Experience Cloud

Salesforce, Spring ’24

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EXPERIENCE CLOUD

Salesforce Experience Cloud lets you create branded digital experiences to share information and collaborate with people who are key to your business processes, such as customers, partners, or employees. Whether you call it a portal, help forum, support community, or something else, an Experience Cloud site is a great place to connect with the important folks in your life.

You can create multiple sites within your organization for different purposes and transition seamlessly between them. For example, you can use Experience Cloud sites to:

- Drive more sales by connecting your employees with your distributors, resellers, and suppliers
- Deliver world-class service by giving your customers one place to get answers
- Promote an upcoming event and manage social listening, content, engagement, and workflows all in one place

Learn more about the versatile ways that you can use Experience Cloud in the video.

Watch a video

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Understand the Basics of Experience Cloud

Discover how Experience Cloud helps you create digital experiences and branded spaces for your employees, customers, and partners. You can build sites, portals, and forums with the level of customization that you want using little or no code. Or, if you're comfortable using code, you can build them programmatically.

Plan and Prepare for Your Experience Cloud Implementation

Experience Cloud comprises flexible, powerful features that you can combine in multiple ways to deliver the digital experience you need, whether it's a portal, help center, or mobile app. And although it can be tempting to dive right into building, we recommend taking time to think about the combination of features you need to deliver a productive, successful site. We can't cover every planning aspect, but these topics describe some key areas to consider, research, and incorporate as you develop your overall plan.

Set Up and Configure Your Org for Experience Cloud Sites

Before setting up your first Experience Cloud site, complete a few tasks in Salesforce Setup to prepare your org for customer- and partner-facing sites. From enabling digital experiences to selecting the correct org settings, we've got you covered! The steps you take when preparing your org for Experience Cloud sites are the same you take when setting up sites for Commerce Cloud, Financial Services Cloud, Health Cloud, and Work.com.

Build and Customize Your Experience Cloud Site

Choose from several preconfigured templates to create your site. Then customize the site to suit your needs and match your brand.

Create Use-Case Driven Sites

Whether you're creating a site for self-service or one for partner vendors, Experience Cloud has the solution to fit your needs.

Secure Your Experience Cloud Site

You can help keep your Experience Cloud site more secure by enabling clickjack protection, authenticating users, encrypting data, and protecting against malicious resources and vulnerabilities in components using CSP and Lightning Locker. These options allow you to maintain the security of your site while still using the external sources you need. In addition, you can use various settings and permissions to protect your data and your customers' data, and publicly share the site with guest users.

Deploy an Experience Cloud Site from Sandbox to Production

We recommend creating, customizing, and testing your Experience Cloud site in a test environment, such as a sandbox, before deploying it to your production org. When testing is complete, you can use change sets or Metadata API to migrate your site from one org to another. Deciding whether to use change sets or MD API depends on several factors. Some things to consider are the complexity of the changes that you're migrating, your level of comfort with developer tools, and the application lifecycle management (ALM) model that you're using.

Manage Your Experience Cloud Site

Administer, manage, and moderate your Experience Cloud site from Experience Workspaces.

Use Reporting in Experience Cloud Sites

Use reporting to see short-term and long-term trends in various areas of your Experience Cloud site. The preconfigured AppExchange package makes reporting a snap for community managers. You can also give the power of reporting to your members.

Experience Cloud Considerations

Keep the following considerations in mind when creating sites with Experience Cloud.

Understand the Basics of Experience Cloud

Discover how Experience Cloud helps you create digital experiences and branded spaces for your employees, customers, and partners. You can build sites, portals, and forums with the level of customization that you want using little or no code. Or, if you're comfortable using code, you can build them programmatically.

Explore the various parts that make up an Experience Cloud site. Get familiar with Experience Cloud's primary setup areas and terminology.

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What Is Experience Cloud?

With Salesforce Experience Cloud you can build CRM-powered experiences quickly and easily. Experience Builder, Salesforce CMS, Mobile Publisher, and a suite of web apps join to help you create robust, customized sites for your every use case.

Building Blocks of a Site

An Experience Cloud site is composed of several layers that work together. Each layer contributes specific types of content and data. To help you understand how the pieces work together, let's divide the components into major categories and discuss how they influence one another

Find Your Way Around

There are three primary areas where you set up, design, and manage your Aura and LWR Experience Cloud sites: Salesforce Setup, Experience Workspaces, and Experience Builder.

Experience Cloud Resources

Learn more about Experience Cloud with helpful videos, guides, and blog posts. Or hit the trail with modules and projects on Trailhead.

Experience Cloud Glossary

Here are definitions to some key terms and concepts related to Experience Cloud.

Supported Browsers for Experience Cloud Sites

Browser support for Experience Cloud sites varies by the device that you access the site from and the site template.

What Is Experience Cloud?

With Salesforce Experience Cloud you can build CRM-powered experiences quickly and easily. Experience Builder, Salesforce CMS, Mobile Publisher, and a suite of web apps join to help you create robust, customized sites for your every use case.

With Experience Cloud, customers and partners can build digital experience platforms to host marketing and corporate sites, partner portals, support forums, web applications, and more. You can start from a selection of prebuilt templates. Use the Customer Service template to build a self-service experience where your customers can help each other, which increases case deflection and user engagement. Create portals where customers can process insurance claims, access their healthcare information, schedule vaccine appointments, and purchase products from stores. Customers can process warranties and self-service claims on automobiles. Companies can manage inventory and make purchases. Use the Salesforce platform to extend the power of CRM data to partners so that they can manage channel accounts and boost products with marketing campaigns.

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Build Your Site, Your Way

Whether you're an admin, designer, or developer, Experience Cloud makes it easy to work the way you want. You can:

- Create customized sites using no-code, point-and-click tools and prebuilt templates, themes, and components.
- Build custom components, apps, and processes using low-code tools for interactive development and automation.
- Develop customized, enterprise-level sites and portals programmatically. Update sites quickly, using your preferred pro-code development tools such as Salesforce Extensions for VS Code, Salesforce CLI, or your favorite IDE or text editor.

To learn more about the versatile ways that you can use Experience Cloud, watch:

Watch a video

Building Blocks of a Site

An Experience Cloud site is composed of several layers that work together. Each layer contributes specific types of content and data. To help you understand how the pieces work together, let's divide the components into major categories and discuss how they influence one another

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Salesforce Platform

Experience Cloud relies on the elements that you've created in your primary Salesforce org—all the applications that make up the Customer 360 platform, such as Commerce Cloud, Service Cloud, Sales Cloud, and Mulesoft. When you set up your org, you create users, profiles, and records that contain different types of data. You use all that data to power and populate your Experience Cloud site.

Platform Services

You can use platform services built on Salesforce with your Experience Cloud sites. When we say platform services, we mean tools that are built on the Salesforce platform and can be used with many Salesforce products, including Experience Cloud. They aren't tools that necessarily exist within the framework of Experience Cloud. For instance, you can use Flow Builder, Process Builder, or Apex triggers and classes with your site.

Content and Assets

Salesforce CMS (Content Management System) is a Lightning app where you can create, store, and manage all your content. Built on your Salesforce org, it exists outside of your site and provides a shared resource that you can use across multiple apps and sites. From that single location you can pull content into many sites and apps without having to recreate and manage the content.

Security

Your site is often the face of your company, useful for communicating with many types of users. To address complex access needs, you need a tailored approach to security and scale. The security settings are managed in several places, and some affect all sites while others are site-specific. Most settings are found in three separate locations: the Settings tile in Experience Workspaces, user permissions in your Salesforce org, and your overall settings for Experience Cloud in Salesforce Setup.

Presentation

The presentation layer is where all the pieces come together and includes the Experience Builder templates and components. You can choose how your site displays to your audience and address accessibility concerns. Experience Builder components often draw from your Salesforce org to populate data and process actions taken by your users. Your personalization and security settings dictate what your users see and how they can interact with your site.

Analytics

When your site is live, you want to understand how users are interacting with it and how you can improve it. Using the Dashboard and Moderation tiles in Experience Workspaces, you can supervise your content and track user data with reports and dashboards. However, the analytics tools built on Experience Cloud are limited. To fully maintain the health of your site and deeply understand user interaction, we suggest implementing tools like Google Analytics or other third-party scripts.

Find Your Way Around

There are three primary areas where you set up, design, and manage your Aura and LWR Experience Cloud sites: Salesforce Setup, Experience Workspaces, and Experience Builder.

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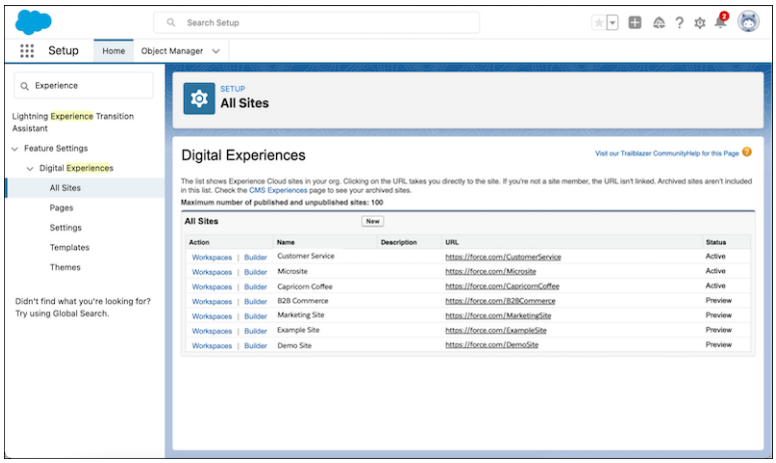
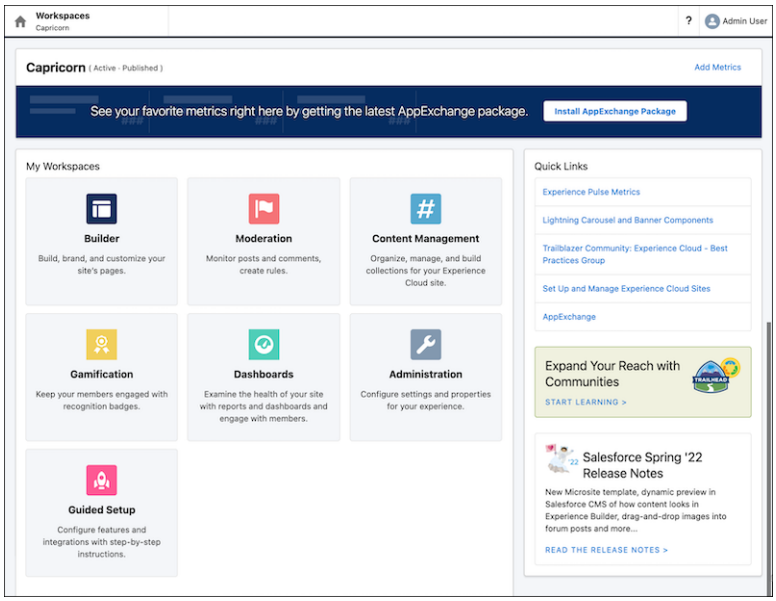
Salesforce Setup

The Salesforce Setup menu contains settings that apply to your Salesforce org. An Experience Builder site is built on top of your existing org and uses your Salesforce data. The Setup menu is where you turn on Experiences, create a site, manage user permissions, and log in to existing sites.



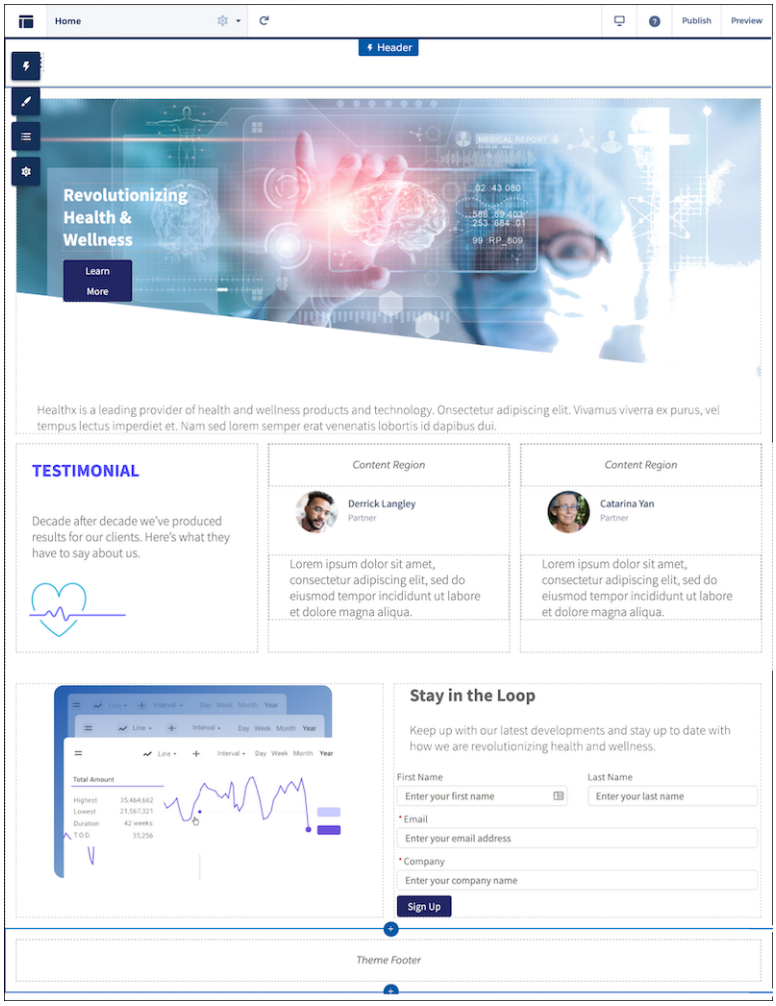
Experience Workspaces

After you create a site, Experience Workspaces is where you access Experience Builder, manage content, configure site settings, and monitor your Experience Cloud site. Community managers can view dashboards for groups, members, feed activity, and license usage and manage the community's reputation system. Moderators can see which items have been flagged for review.



Experience Builder

Use Experience Builder to customize your site. Experience Cloud offers many types of sites, from community portals to online stores. Based on the template you choose, Experience Builder provides a list of pages and components that you can use on those pages. Create themes to fit your custom branding, and when you're ready to go live, publish your site.



Experience Cloud Resources

Learn more about Experience Cloud with helpful videos, guides, and blog posts. Or hit the trail with modules and projects on Trailhead.

Trailhead

Before you create an Experience Cloud site, we recommend going over a few key concepts in Trailhead.

- Expand Your Reach with Experience Cloud (Trail)
- Customize your Experience Cloud Site (Trail)
- Salesforce CMS Basics (Module)
- Experience Cloud Site Strategy (Module)
- Experience Cloud for Newbies (Trailmix)
- Create and Manage Experience Cloud Sites (ADX271) (Trailhead Academy)

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Create, Design, and Manage Experience Cloud Sites

- Learn Experience Cloud
- Experience Cloud Sites Managers Guide (PDF)
- Report on Experience Cloud Sites with AppExchange Packages
- SEO for Experience Builder Sites

Videos

- Who Sees What in Experience Cloud Sites Series
- Experience Cloud Sites and Users in Your Salesforce Org

Limitations, Supported Browsers, and Mobility

- Experience Cloud User Licenses
- Supported Browsers for Experience Cloud Sites
- Access Experience Cloud Sites in the Salesforce Mobile App

Advanced Customizations

- LWR Sites for Experience Cloud
- Experience Cloud Developer Guide
- Experience Cloud Developer Center
- Build a Custom Theme Layout Component for Experience Builder Sites (Project)
- Customize Your Experience Cloud Site (Trail)
- Lightning Aura Components Developer Guide
- Lightning Web Components Developer Guide
- Visualforce Developer Guide
- Visualforce Component Reference
- Salesforce Developers Blog (Scroll to the Blog section)

AppExchange Packages

- Community Management Package for Communities with Chatter
- Community Management Package for Communities without Chatter

Going from Legacy Portals to Experience Cloud Sites

- Create and Manage Partner Portals (PDF)
- Migrating From Portals to Communities (PDF)

The Trailblazer Community

- Experience Cloud
- Community Management

Experience Cloud Glossary

Here are definitions to some key terms and concepts related to Experience Cloud.

Experience Cloud

Salesforce Experience Cloud is a digital experience platform that makes it easy to build beautifully designed, CRM-powered online sites. What was formerly known as Community Cloud is now called Experience Cloud, to better reflect the many types of digital experiences you can create and connect.

Experience Cloud Site

An Experience Cloud site is an online space for connecting with your customers, promoting collaboration, and streamlining key business processes.

- Experience Builder sites, formerly called Lightning communities, are template-based sites that you customize in Experience Builder. These sites are built on one of two frameworks—Lightning Web Runtime (LWR) or Aura.
  - LWR sites are built with the latest LWR-based templates, such as the Build Your Own (LWR) and Microsites (LWR) templates. From Winter '23, new LWR sites are hosted on the enhanced sites and content platform, and they're referred to as enhanced LWR sites.
  - Aura sites are built with our original templates that run on Aura, such as Customer Service, Partner Central, and Customer Account Portal.
- Visualforce sites, previously called Salesforce Tabs + Visualforce sites, are sites that you develop using Visualforce.

For clarity, we use the terms *LWR sites*, *enhanced LWR sites*, *Aura sites*, and *Visualforce sites* where possible to help you identify which features apply to your site. See also Enhanced Sites and Content Platform.

Enhanced Sites and Content Platform

The enhanced sites and content platform is a flexible system that brings together Salesforce CMS and LWR sites. From Winter '23, new LWR sites and CMS workspaces that you create are hosted together on this redesigned platform, which offers partial deployment, site content search, easy content management, and more.

To identify LWR sites that are hosted on the new platform, we use the term *enhanced LWR sites*. And for CMS workspaces, we use the term *enhanced CMS workspaces*.

See What Is the Enhanced Sites and Content Platform?

Experience Builder

Experience Builder is used to design and build LWR and Aura sites using preconfigured templates and Lightning components. Use standard or custom components to create customized site pages without code.

Experience Workspaces

Command central for administering your Experience Cloud site. From Workspaces you can access Experience Builder, manage content, configure site settings, and monitor your site. Community managers can view dashboards for groups, members, feed activity, and license usage, and manage the community's reputation system. Moderators can see which items have been flagged for review.

Community

The old term for what is now known as an Experience Cloud site. The new term better reflects the many types of digital experiences you can create.

Framework

The codebase or technical platform on which your Experience Cloud site is built. You can build a site using one of three frameworks: Lightning Web Runtime (LWR), Aura, and Visualforce.

Template

A predesigned set of solutions that help you quickly build a site that meets specific business needs. Templates are preconfigured with page layouts, components, and business processes designed to address common business scenarios. We have templates for

customer self-service, help centers, and partner relationship management, as well as a build-your-own template that offers common pre-built pages to jump-start a custom site.

External User
Any user logging in to an Experience Cloud site with an Identity license or Experience Cloud license.

Guest User
Any user accessing an Experience Cloud site without logging in. Guest users are always unauthenticated.

Salesforce CMS
The Salesforce Content Management System is a hybrid CMS where you can create, manage, and publish content from a centralized location. In the Digital Experiences app (previously called the Salesforce CMS app), you can share your content to Salesforce endpoints, such as Experience Cloud sites and marketing emails, or to external channels.

CMS Workspace
You use CMS workspaces in the Digital Experiences app to create, organize, and share your content. Each workspace can have its own contributors, translation language settings, channels, content, and folders. See also Enhanced Sites and Content Platform.

CMS Connect
A solution that connects external CMS content to your Experience Builder site for consistent branding, reuse of material, and ease of maintenance.

Supported Browsers for Experience Cloud Sites

Browser support for Experience Cloud sites varies by the device that you access the site from and the site template.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Salesforce Tabs + Visualforce

Salesforce Tabs + Visualforce sites are supported on all desktop browsers that Salesforce supports. These sites are also accessible from the Salesforce app.

Experience Builder Sites

Experience Builder sites such as Customer Service, Partner Central, and Help Center are supported on these browsers.

Desktops and Laptops

Platforms	Apple® Safari®	Google Chrome™	Microsoft® Edge (Windows® 10 Only)	Microsoft® Internet Explorer® 11	Mozilla® Firefox®
Apple® macOS® Desktop	Supports latest stable browser version	Supports latest stable browser version	Not supported	Not supported	Supports latest stable browser version
Microsoft® Windows® Desktop	Not supported	Supports latest stable browser version	Supports latest stable browser version	Ended support on December 31, 2020	Supports latest stable browser version

Note: Support for accessing Experience Builder sites with Internet Explorer 11 ended on December 31, 2020. But there's no difference for site visitors using the browser in the short term. Because Experience Cloud no longer tests new features on Internet Explorer 11, your site can function differently than expected. To let users know they must switch browsers, enable display warnings for unsupported browers. From Setup, in the Quick Find box, enter `Digital Experiences Settings`, click **Settings**, and select **Display warning for unsupported browsers**.

Note: To load Experience Builder with Safari 13.1 or above, disable these settings:

- Block All Cookies
- Prevent Cross-Site Tracking
- Private Browsing
- Block Pop-ups (Pop-up blocking can prevent some pages from opening in a new tab.)

Mobile Devices

Platforms	Apple® Safari®	Google Chrome™	Microsoft® Edge (Windows® 10 only)	Microsoft® Internet Explorer® 11	Mozilla® Firefox®
Android™ Phone and Tablet	Not supported	Supports latest stable browser version	Not supported	Not supported	Not supported
iOS Phone and Tablet	Supports latest stable browser version	Not supported	Not supported	Not supported	Not supported
Windows® 8 Phone	Not supported	Not supported	Not supported	Ended support on December 31, 2020	Not supported
Windows® 10 Phone	Not supported	Not supported	Supports latest stable browser version	Not supported	Not supported

Unsupported Browser Notification

Some unsupported browsers can load the Lightning framework. When users try accessing an Experience Builder site in one of these browsers, they see a notification asking them to update or switch browsers. Other unsupported browsers such as Internet Explorer 10 or below can't load the Lightning framework. If users try accessing a site in one of these browsers, they see a blank page.

If you tested your site in an unsupported browser and everything works as expected, you can disable the default notification. From Setup, in the Quick Find box, enter `Digital Experiences Settings`, click **Settings**, and deselect **Display warning for unsupported browsers**.

Note:

- If you used a WebView to create a mobile site, check that the pop-up window appears the way you like.
- Users don't see the unsupported browser notification on site login pages. If you know that your users are using unsupported browsers to access your site, create Visualforce login pages and use them instead of default site login pages.
- The unsupported browsers setting doesn't apply to Lightning Web Runtime (LWR) sites.

Plan and Prepare for Your Experience Cloud Implementation

Experience Cloud comprises flexible, powerful features that you can combine in multiple ways to deliver the digital experience you need, whether it's a portal, help center, or mobile app. And although it can be tempting to dive right into building, we recommend taking time to think about the combination of features you need to deliver a productive, successful site. We can't cover every planning aspect, but these topics describe some key areas to consider, research, and incorporate as you develop your overall plan.

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Define Your Site Vision and Purpose

Experience Cloud makes it easy to build sites that deliver customer-first experiences—fast! But, before you dive head-first into building your Experience Cloud site, pause for a moment to envision the larger picture of what you want your site to accomplish. What is your website's primary purpose?

Learn About Experience Cloud Frameworks and Templates

Select a framework and template as part of your site planning. The choices you make at the beginning of your site creation process have long-term downstream implications. In particular, consider your business objectives, your technical know-how, and the costs associated with each.

Learn More About Experience Cloud Licenses

Licenses are a gateway to authenticated access to your Experience Cloud sites. So one of the most important steps when planning a site is selecting the right licenses for your use case. These licenses grant access to Experience Cloud sites to customers and partners who can't otherwise log in to your company's Salesforce org: External Identity, External Apps, Customer Community, Customer Community Plus, Partner Community, and Channel Account. A Salesforce account executive can help you understand the difference between the licenses, and help you decide the best ones for your use case. Before that, let's answer some basic questions first.

Who Does What in Experience Cloud?

Experience Cloud sites are typically not developed, designed, and maintained by a single person because these tasks require different skills. Depending on the size of your company and scale of your site, you could have some people handle several roles or a dedicated person for each role.

Define Your Site Structure, Layout, and Design

After you consider your site's vision and purpose and you're familiar with frameworks and templates, you can plan your site's structure, layout, and design.

Map the Customer Journey and Drive Engagement

You defined a site vision that aligns your site with your company's purpose. Now you want to design a site experience that encourages users to visit your site and interact with your content. But to promote customer engagement, you must first understand your customers' needs and create compelling content in to meet those needs.

Plan Your Site's Content Management Strategy

If you're like most organizations, you have a large amount of content, and you need a plan to create, organize, and manage it. Get the right content in front of the right people at the right time with a solid content strategy. Explore the various Salesforce offerings that provide content management solutions for different scenarios.

Plan a Mobile Strategy for Your Site

Over half of customer interactions happen over mobile devices. So having a mobile-responsive site isn't an option anymore, it's a necessity. Before you create a mobile site, ask these questions to help solidify your mobile strategy.

Performance and Scale of Your Experience Cloud Site

With Experience Cloud, you can build a wide range of business-to-consumer (B2C) and business-to-business (B2B) applications. Examples include help forums, self-service portals, partner and channel websites, commerce and ticketing stores, and vaccination and appointment sites. Many of these sites require high user volume and they experience high traffic. We extensively test every standard template, component, and product for performance and scale, but standard capabilities can be extended to build highly customized experiences. Customizations, high user volume, and high traffic, and more can impact a site's performance. Salesforce offers a range of features focused on supporting performance and scale regardless of your site's requirements.

Develop a Security Plan for Your Experience Cloud Site

Salesforce has various security settings and permissions you can use when you're building a site on the Experience Cloud platform. Before you start creating a site, put together a security plan that can help you during the implementation.

Prepare to Promote Your Site and Measure Its Success

Your Experience Cloud site gives you a web presence and helps you connect your business to the people who need it—both inside and outside your company. Generate excitement, awareness, and traffic for your site with a promotional plan, and consider how to measure adoption of your site when it's live.

SEE ALSO:

Video: Implementation Best Practices

Define Your Site Vision and Purpose

Experience Cloud makes it easy to build sites that deliver customer-first experiences—fast! But, before you dive head-first into building your Experience Cloud site, pause for a moment to envision the larger picture of what you want your site to accomplish. What is your website's primary purpose?

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Why Is This Important?

When you're clear about your site's purpose, you take a strategic approach to building and managing your site. And then clarity about your target audience, conversion actions, goals, and measurements naturally follow.

Your investment in this site goes beyond the resources used to build it. Your online presence is typically the first impression of your business that your customers have. A clearly defined purpose is the first step to building a meaningful website that adds value for you and your customers and partners.

Having a clearly defined site purpose also helps you:

- Ensure all members of your team are aligned on the overall goals of the site.
- Determine which framework and template best serve your needs.
- Develop the design of your website, including the layout and which pages and features to include.
- Set up your site for success when you plan your rollout and adoption framework.

- Gather the right people to drive your site to fruition.

What Should You Keep in Mind?

Here are some considerations to help you craft your vision and purpose.

Review Your Objectives: Highlight which key elements of the business the site addresses. Does it lower costs, increase brand awareness, or simplify operations? Are you creating a business flow, such as a registration process or an onboarding process? Here are some objective ideas.

- Improve engagement: Give customers an easy way to interact with your organization whenever and wherever they are. They can search for articles, ask questions, and get crowd-sourced answers.
- Provide self-service: Empower your customers to find solutions to customer-service issues on their own with access to your knowledge base, your service agents, and peer-to-peer support. Provide access to their data in a member portal.
- Improve partner relationships: Collaborate on opportunities and deals to increase you and your partners' revenue stream. Onboard partners quickly by sharing content and training materials.

Consider the Use Cases: Use cases are foundational to your strategy and the user experience. Use cases can help you define, map out, and prioritize how you want your customers to use the site. Define an initial set of use cases and align them with your business objectives. Think of use cases in terms of a prioritization exercise. To get started, think about what's most important for your site to support the experience you want to create. Then, prioritize the use cases by noting which are accelerated growth drivers, top-priority growth drivers, tough wins, and efficiency drivers.

Example: **Self-Service Portal Use Case**

A self-service site is a place where you can help your customers help themselves. Here are some of the use cases for this type of site.

- Account Management—Users can conveniently update their contact information, update their preferences, and sign up for new services.
- Help Portal—Supply knowledge articles that aid in case deflection, customer satisfaction, and agent productivity. Use chatbots or live agents to supply quick responses to questions.
- Support Portal—Provide easy access to customer support and the ability to create and track cases. Pair with a support knowledge base so users can get answers quickly.

What's Next?

After you have a clear vision of where your site is headed and how to get there, you can fill in the blank in this question:

"The purpose of my site is to _____"

Write down your vision and use it as your guiding light as you plan and prepare for site building. And now, full speed ahead to bring your vision to life!

Find Out More

Experience Cloud Site Management Canvas Planning Tool

Show Me How: Best Practices for Adoption in Your Sites

Experience Cloud Site Strategy

Learn About Experience Cloud Frameworks and Templates

Select a framework and template as part of your site planning. The choices you make at the beginning of your site creation process have long-term downstream implications. In particular, consider your business objectives, your technical know-how, and the costs associated with each.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Is This Important?

You can build an Experience Cloud site using one of three frameworks: Lightning Web Runtime (LWR), Aura, or Visualforce. Each framework supports different templates.

The LWR framework uses Lightning Web Components (LWC). LWC offers a platform for developers to build components on a standardized web stack. The LWR framework with LWC creates unparalleled performance and speed. LWR templates include Build Your Own (LWR) and Microsite (LWR). To build a site using an LWR template, you need access to developer resources.

Aura uses a standardized Server-Side JavaScript framework, which helps developers build customizable components. But web practices have changed, improved, and become even more standardized since Server-Side JavaScript's introduction in 2014, paving the way for the evolution to LWR. Aura templates include Customer Service, Partner Central, Help Center, Build Your Own, and Customer Account Portal. Aura templates are mostly low-code. Lightning web components and Aura components can coexist and interoperate on a page.

The Visualforce framework includes a tag-based markup language, similar to HTML, and a set of server-side "standard controllers" that make basic database operations simple to perform. The Visualforce framework supports Salesforce Tabs + Visualforce sites. To create a branded experience using Salesforce Tabs + Visualforce, you need access to developer resources.

Find Out More

- Which Experience Cloud Template Should I Use?
- What Is the Enhanced Sites and Content Platform?

Learn More About Experience Cloud Licenses

Licenses are a gateway to authenticated access to your Experience Cloud sites. So one of the most important steps when planning a site is selecting the right licenses for your use case. These licenses grant access to Experience Cloud sites to customers and partners who can't otherwise log in to your company's Salesforce org: External Identity, External Apps, Customer Community, Customer Community Plus, Partner Community, and Channel Account. A Salesforce account executive can help you understand the difference between the licenses, and help you decide the best ones for your use case. Before that, let's answer some basic questions first.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Is This Important?

Licenses are an investment for your business, so license selection is key. Along with profiles and permission sets, licenses give your customers more or fewer permissions and access to items displayed on your site.

One way to look at your site's relationship with licenses is to see it as an airplane. Each passenger has a different type of ticket (license), and therefore, different levels of access. They're all on the same ride, but each passenger has a slightly different experience based on how much their ticket cost.

Customer Community Licenses get a basic pass, like an economy ticket. Customer Community Plus Licenses get more access, like a business ticket. Partner Community Licenses? They get much more access, like a first-class ticket.

What Should You Keep in Mind?

When you're considering Experience Cloud licenses for your site, start with your site's goals, and then find a license that aligns with them. Define and prioritize your use cases and how they impact your company. After you define your site's goals, the next step is to define the different personas who can access the site. After you define your persona requirements, align the license for each persona. Each persona and set of requirements can require different licenses.

Here are some questions to consider when choosing among the various license types. This list isn't exhaustive, but it's a good starting point.

- Who are your site's users?
- How many users do you expect to access your site?
- Are your site's users logging in to the site to do something, or are they simply browsing and filling out the occasional form?
- How often do you expect users to log in to the site?
- What objects do you expect your users to access, and what type of access do they need, for example, read, write, edit?
- Do your users need access to reports and dashboards?
- Do your users need extra platform capabilities such as API calls, data, and file storage?
- What type of sharing do you want your users to be able to access?
- Do you want your customers or partners to manage their own accounts, such as adding new users for accounts they can access or disabling users?

  In Enterprise, Performance, and Unlimited editions, you can create up to 100 Experience Cloud sites without buying communities licenses. However, you need licenses for some features in Experience Cloud to work. For example, to create sites using the Partner Central template, you must purchase at least one Partner Community license.

  Active, inactive, and preview sites, including Lightning Platform sites, count against this limit. Archived sites don't count against your maximum limit.

Find Out More

Experience Cloud User Licenses

Who Does What in Experience Cloud?

Experience Cloud sites are typically not developed, designed, and maintained by a single person because these tasks require different skills. Depending on the size of your company and scale of your site, you could have some people handle several roles or a dedicated person for each role.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Is This Important?

Experience Cloud accommodates many use cases and customization capabilities. When you create a site, it's important to consider who has the necessary skills for each role to build your team. Assigning a single person to manage all the different facets can become unmanageable if your site is large or complex.

What Should You Keep in Mind?

Before you begin, consider the lifespan of a site and the required skills. First, you design and build the site and then create and add content. You also promote, maintain, and grow the site. Each phase requires different skills that must be accounted for when you create your site. Here's our recommended implementation team and the skills they require. Keep in mind that a single person can fill many of these roles in a small company.

Design and Build Roles and Skills

- Solution Architect— Understands the fundamental structure of the site and how to create it.
- Business Process Analyst— Understands the business requirements and how the site is used. The business analyst has deep knowledge of your company, the problems to solve, and how your site plans to solve them.
- Developer— Although many Experience Cloud features are point and click, when creating a more complex site, a developer trained on the Salesforce platform can set up and customize your site more efficiently.
- User Interface Designer— We offer many tools to customize the look and structure of your site, but without intuitive design they often go to waste. Your designer must have a thorough understanding of web design and your target audience to get the most value for your site.
- User Experience Designer— Working with your UI designer, the UX designer is the voice of the customer. A solid user experience grounded in user research can improve the useability of your site.

Content Creation and Management Roles and Skills

- QA Professional— Before you go live and whenever you update your site, test your changes carefully. It's helpful to have a fresh set of eyes for quality checks. Make sure that the various user types have access to the correct things and that your setup has no security vulnerabilities.
- Content Manager— A single site often uses many different types of content, from images, to videos, to plain text. Make sure that your content is up to date and ready for prime time. If you don't have someone managing your content, it's easy for your site to become dated quickly.
- Digital Engagement Manager— After your site is deployed and available to your users, you want someone to maintain it over time. Make sure that your users are engaging with your content and each other with analytics tools and the moderation tile. Creating an excellent site requires a significant amount of work, but maintaining your site after going live is the true key to success.

Find Out More

Managers, Moderators, and Admins Working Together

Best Practices for Adoption in Your Sites

Define Your Site Structure, Layout, and Design

After you consider your site's vision and purpose and you're familiar with frameworks and templates, you can plan your site's structure, layout, and design.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Is This Important?

Planning your site's structure, layout, and design before you begin building it helps you prioritize what to launch. You can narrow the scope of your site and set clear milestones for launching it. A plan in place makes building your site faster and easier.

What Should You Keep in Mind?

User Experience:

Think of your site as a product that you design for your users. To find out what your users want and expect from your site, consider conducting a user experience initiative that includes research and interviews. Integrate your findings with any personas and journeys that you built, and then plan your site's structure, layout, and design. If possible, involve user experience and user interface designers.

Structure and Information Architecture:

Your site's structure depends on how you organize its information. Consider your users' expectations and needs. What intuitive paths can they take to find content? How can you organize the content to match these paths and make content easy to find? If you conducted user experience research, refer to your findings.

Organize your planned site content into labeled categories. Labeled categories help you structure your site's navigation system and menu. Make the labels concise, meaningful, and not too broad or too specific. For example, you can group business location, hours of operation, staff, and mission statement in a category labeled About Us. This category can become an item in your navigation menu. The top-level categories that you come up with can become the top-level labels in your navigation menu. And then you can add informational subcategories to each top-level menu.

Page Layout:

Using the categories you devised for your site structure, decide how to organize the pages and subpages that contain your content. Title your pages intentionally and order them according to your information architecture so that users can easily find them through the navigation menu or search. You can adjust your navigation as you develop pages. Make sure to match primary pages with top-level menu categories, and match subpages with subcategories.

Begin to design your pages by using the Experience Cloud templates, which are preconfigured with page layouts. Available templates include layouts designed for use cases such as hosting a partner website or help center, or providing customer service.

Customize your pages with content and features that are important to your users. For example, add sections to your site based on the questions that came up the most for your customers during user experience research. To prioritize what your users need, work closely with user experience and user interface designers, if possible.

You can define audiences and then associate them with page variations that you create and customize. Only the users in those audiences can see page variations so that the content is personalized for them. For example, you define an audience as users who live on the West Coast of the United States. Create a variation of your home page with photographs of the Pacific Ocean and coastal landscapes. Then apply the West Coast audience to the page so that only those users can see it. Other users see the default page.

Page Structure and Components:

Consider the specific components and structure of each type of page. If possible, work with your user experience designers to create wireframes—sketches of a page's features and component configuration. You can solicit early feedback on your wireframes and ensure that you're incorporating users' needs as you design. You can also use one of our templates to sketch out a site in Experience Builder, and have people look at the site in the builder in preview mode.

Some web design features are consistent and standardized. For example, page headers often include a company's name or logo in the top right, a search bar in the top left, and a menu bar across the middle. Users are familiar with these conventions, so keep them in mind when you design.

Incorporate your brand. Consider where to place your organization name, and consider the colors, fonts, and images to employ. These design components contribute to your brand image. Keep your branding consistent across pages and subpages, from your homepage, to a forum, to an FAQ page, and more.

Find Out More

Manage Your Site's Pages and Their Properties in Experience Builder

Edit Pages and Components in Experience Builder

Personalization with Audience Targeting in Aura Sites

Map the Customer Journey and Drive Engagement

You defined a site vision that aligns your site with your company's purpose. Now you want to design a site experience that encourages users to visit your site and interact with your content. But to promote customer engagement, you must first understand your customers' needs and create compelling content in to meet those needs.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Is This Important?

Engagement describes just how involved your customers and partners are with your site. How often do they visit the site? How long do they stay? What do they do on the site?

Improve customer engagement and satisfaction by understanding the customer experience. The customer experience is a combination of two factors:

- User personas represent specific types of customers. Think of your personas as fictional characters with real-world responsibilities, goals, and challenges.
- Customer journeys map how your customers use your products and services. Identify what your customers want to accomplish and how they feel at each stage of their experience.

When you understand what your users need, you can design a site that helps them accomplish their goals.

Tip: As you go through this process, define specific outcomes to measure success: improved customer retention, reduced support costs, faster conversions, and so on. Then you can measure improvements as you make them.

What Should You Keep in Mind?

To begin mapping the customer journey, first develop the characteristics of your user personas. To start the process, answer some questions.

- What roles do the top two or three users have?
- What are their responsibilities, challenges, goals, and motivations?
- What do they want to accomplish on your site?

You can then start asking some questions about the customer journey to detail the sequence of customers' key activities on the site. Where possible, seek input from your support, sales, and marketing teams.

- To meet their goals, what type of content do your customers need?
- Are customers looking at your content for informational or learning purposes?
- Are they accessing the site using desktop or mobile devices?
- What do they do when they access the site?
- Which interactions are most important?

Ideas for Promoting Engagement

Obviously, the best way to engage users is to have a site that meets their needs. Let's look at some examples.

Example: Let's say you want to create a compelling product registration experience for new customers. Consider creating a home page with a vivid product image in the background and a prominent call-to-action registration button. Provide links to product information and customer testimonials.

Example: If your site is a self-service help portal, you want to create an experience that helps users solve a problem or learn more about your product or services. In this case, to improve engagement, consider making the portal available from the home page of your corporate website with an easily identifiable icon that links to the self-service portal. Also consider providing as much publicly available self-service content as possible on your site. Because public, or unauthenticated, content is discoverable through search engines, it encourages users to visit, stay, and explore your site. When they're on your site, consider guiding visitors to the most relevant content with a quick-start topic or a search bar where they can enter key terms.

Plan Your Site's Content Management Strategy

If you're like most organizations, you have a large amount of content, and you need a plan to create, organize, and manage it. Get the right content in front of the right people at the right time with a solid content strategy. Explore the various Salesforce offerings that provide content management solutions for different scenarios.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Is This Important?

If you create content, you need a content strategy, or a plan for the types of content that you want to create for your site. Define the business goals you want your content to achieve and identify the content that best meets these goals. Also think about how you manage your content: how you organize content assets, when and where to publish, and when to refresh or replace your content.

Being strategic about the content you create and deploy lets you extend the reach of your content, refines content workflows, and improves customer interactions and experiences.

What Should You Keep in Mind?

Let's take a quick look at what to consider when developing a strategy, and the Salesforce tools that can help you manage your content.

Develop a Content Strategy

- Plan—Identify your audience and goals.
  - What do you want your content to do? For example, drive sales, build brand awareness, or promote engagement.
  - How does your audience engage with content? What formats do they like, for what content?
- Audit—Understand where you are today. Take note of the resources you have and what's working (or not) right now.
  - What content do you have for different stages of the customer journey?
  - What content can you reuse?
  - Where are there gaps?
  - Is existing content easy to find?
  - What content management system (CMS) are you using? Is there just one, or do you need to coordinate multiple systems?

Note: As you plan and audit, you're likely to find that your content falls into categories such as:

- Customer-facing content: Blog posts, social media posts, and so on
- Digital assets for branding and web design
- Help and support documentation, knowledge articles

    - Internal documents: Sales decks, spec sheets, market research

- Map—Define customer journeys. Consider how you sequence information for maximum customer benefit.
  - How is your content linked together?
  - What is the customer experience like across various channels?
- Build—Build the right content and define your processes.
  - What types of content do you need?
  - How can you plan for content reuse?
  - How are you organizing content and managing versions?
  - How do you store resources and assets?
  - How often do you plan on updating your content?
- Activate—Distribute content to the right audiences and channels.
  - How can you put your content where your audience is?
  - Do you have an editorial calendar? A social media calendar?
  - How can you drive people to the content that you're creating?
  - How do you manage content lifecycles?
- Measure—You know what they say: if you want to manage it, measure it.
  - What metrics can you use for different content types? For example, visitor counts, likes, search traffic, or downloads.
  - Which content is turning into leads, sales, or closed deals?
  - What reports are you running, at what cadence?
  - How can you continue to optimize over time?

Salesforce Content Management Tools

Here are some Salesforce tools that can help you with a variety of content scenarios.

- Salesforce CMS—Our hybrid CMS system lets you author and maintain all your experience-related content inside Salesforce, then serve that content anywhere, inside or outside Salesforce. Your teams can create content in a centralized location and distribute it either to a Salesforce-powered experience (built with Experience Builder or Commerce Page Designer) or to another system.
  - Create, manage, and reuse articles, news, blogs, banners, and images from a central location.
  - Use our headless APIs to deliver content to a third-party site, experience, or mobile app.
  - Organize content into workspaces and provide control over who can create and access content.
  - Create collections and use topics to organize content.
  - Support multiple languages.
- CMS Connect—Using a CMS other than Salesforce? No problem! Embed content from an external CMS into your Experience Builder site for branding consistency, reuse of material, and ease of maintenance.
- Salesforce Files and Libraries—Salesforce Files and Libraries provide a system for organizing, sharing, and controlling access to content within Salesforce. When you share Salesforce Files with related records, you can keep your documents with your CRM data and carry access control over, too.
  - Store files privately or share with records, groups, or users.
  - Set access permissions to reflect the record's access settings and configure security settings for file upload and download.

  - Use content deliveries and public links to share documents with people outside your organization.
  - See and organize document versions.
  - Use Libraries to organize your files into folders and control access to libraries.
  - Store headers and logo images inside Salesforce as asset files, which can be used for components or Experience Cloud sites.
- Salesforce Knowledge—A knowledge base is a collection of articles with information about your products and services. This self-service model improves customer satisfaction while deflecting cases, lowering costs, and increasing support agent productivity.
  - Write, edit, publish, and archive articles from one system.
  - Provide information to internal, partner, customer, or public audiences.
  - Control access to articles based on permissions.
  - Provide support articles in multiple languages.
  - Includes version control and version comparison.
  - Set up approval processes for quality control.
  - Classify and find articles using topics and data categories.
  - Extend functionality with Apex code.

Find Out More

Developing a robust strategic content strategy can be a fairly involved process, but we have a couple of excellent guides to help you through it.

- Content Strategy Development
- Content Operations and Management
- Salesforce CMS
- CMS Developer Guide
- Create, Share, and Organize Files
- Salesforce Knowledge

Plan a Mobile Strategy for Your Site

Over half of customer interactions happen over mobile devices. So having a mobile-responsive site isn't an option anymore, it's a necessity. Before you create a mobile site, ask these questions to help solidify your mobile strategy.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

What Should You Keep in Mind?

Use these questions as a starting point to help you focus.

- What is the main goal of your mobile app?
- Who is the main audience for your app?
- What micro moments are you creating for your customers and partners?
- What resources does your new mobile app require?
- Do you need just a mobile site, or do you want a mobile app distributed through the App Store or Google Play?

- Do you want to enrich your mobile experience with native capabilities, such as push notifications and biometric login?
- How well can your site work on slow network connections?
- How can you adjust your site design to account for smaller screens on mobile devices?

Find Out More

Mobile Publisher for Experience Cloud

Performance and Scale of Your Experience Cloud Site

With Experience Cloud, you can build a wide range of business-to-consumer (B2C) and business-to-business (B2B) applications. Examples include help forums, self-service portals, partner and channel websites, commerce and ticketing stores, and vaccination and appointment sites. Many of these sites require high user volume and they experience high traffic. We extensively test every standard template, component, and product for performance and scale, but standard capabilities can be extended to build highly customized experiences. Customizations, high user volume, and high traffic, and more can impact a site's performance. Salesforce offers a range of features focused on supporting performance and scale regardless of your site's requirements.

For some sites, we suggest enabling performance and scale optimizations to ensure that your site meets your performance needs. Work with your Salesforce representative to identify whether your site requires further configurations.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

Why You Should Evaluate Your Site

Site patterns determine which performance optimization tools are most beneficial. Do site visitors view or create content? Does your site support a high volume of users or a high amount of traffic? Does your site use many roles? Salesforce has created performance tools to address the impact of these different site patterns and more.

For examples of Experience Cloud site types and the traffic and transaction patterns most likely to affect performance, see Which Performance Tools Do I Need Based on My Experience Cloud Site?

What Should You Keep in Mind?

Consider using performance tools if your site has these attributes.

- You expect a large number of site users
- You expect a high amount of traffic or transactions
- Your site requires many roles
- You're customizing the standard Salesforce experience
- You're using additional services at scale

How Can You Improve Performance and Scale?

This table outlines the issues most likely to affect site performance and scale and shows the tools to use.

Optimization Tools	Content Delivery Network (CDN) for Digital Experiences	Experience Cloud License Type	Account Role Optimization (ARO)	High-Volume Creation Using Micro-Batching	Lightning Web Runtime (LWR)	Apex Caching	Progressive rendering	Page Optimizer	Scale Testing
Performance Impact									
High volume of users		✅	✅						
High traffic	✅			✅	✅	✅	✅	✅	
Heavy transaction load				✅					✅
Many roles		✅	✅						
Heavy Customizations					✅		✅	✅	✅
Additional Services used at scale									✅

Find Out More

- Serve Your Experience Cloud Site with the Salesforce Content Delivery Network (CDN)
- Experience Cloud User Licenses
- Account Role Optimization
- High-Volume Creation Using Micro-Batching
- LWR Sites for Experience Cloud
- Progressive Rendering
- Page Optimizer
- Apex Caching on Salesforce CDN for Digital Experiences

Develop a Security Plan for Your Experience Cloud Site

Salesforce has various security settings and permissions you can use when you're building a site on the Experience Cloud platform. Before you start creating a site, put together a security plan that can help you during the implementation.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Is This Important?

The security of the data you store in Salesforce is critical to the integrity of your business. Beyond data, security includes authentication, public unauthenticated access, and cookie management.

What Should You Keep in Mind?

Making a detailed and specific plan for your data security needs is an essential step to creating a safe and secure site for your customers and partners. Ask these questions before you start your implementation.

Data Security and Encryption:

- How much access to different objects in Salesforce do you want to give to your site's users?
- Is this access different for authenticated users versus unauthenticated users?
- What external organization-wide sharing settings do you need so you can restrict the default access level for an object's records?
- What field-level security settings do you need so that you can restrict users from seeing certain fields?
- What object permissions must you specify for users to create, read, edit, and delete records for each object?
- Do you want to encrypt data elements, such as standard or custom fields or files?
- Does your Salesforce org already have an encryption policy for its internal users?

Access:

- Do you want your users to sign in to the site, only browse as guest users, or both?
- Which default object permissions, if any, do you want to apply to the guest user profile?
- Which system permissions do you want to remove from the guest user profile?
- Which Visualforce pages and Apex controllers do your guest users need access to?
- Do you want guest users to see other members of your site?
- Do you want to use nicknames to protect the identity of your site's members?

Authentication:

- Do you want your users to self-register?
- Do you want site users to authenticate using an external identity provider (single sign-on)?
- Do you need configurations for third-party authentication providers, such as Facebook or LinkedIn?
- Do you want to build integrations between your site and custom branded apps, such as mobile or desktop apps?

Cookies:

- Do you need end-user cookie consent management?

Find Out More

- Who Sees What in Experience Cloud
- Show Me How: External Sharing

- Trailhead: Protect Your Salesforce Data
- Trailhead: Share CRM Data with Your Partners
- Show Me How: Single Sign-on
- Show Me How: Self Registration
- Show Me How: Cookie Consent Management
- Develop Secure Sites: Authenticated and Guest Users

Prepare to Promote Your Site and Measure Its Success

Your Experience Cloud site gives you a web presence and helps you connect your business to the people who need it—both inside and outside your company. Generate excitement, awareness, and traffic for your site with a promotional plan, and consider how to measure adoption of your site when it's live.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Is This Important?

You want to create a good site that creates value for your business and your customers. Start by having a solid plan for site rollout and measuring what success looks like for your company.

First define your site purpose and vision and map the customer journey and drive engagement.

What Should You Keep in Mind?

All your hard work to plan and build your site culminates with a site launch! When you plan for a successful site rollout, consider how to:

- Promote your site internally and externally.
- Measure adoption success based on key performance indicators and business goals.

Promote:

Get the word out to your internal audience and external customers when your site goes live or has new offerings. A promotional plan helps you gather your thoughts, tie back to your site vision and purpose, and prepare for communicating the growth of your site over time.

Create a promotional and marketing plan for every phase of growth.

- Generate excitement and promote your site internally by letting employees know that you're launching.
- Use existing promotional channels such as other websites, social media, Slack, YouTube, and email to communicate with customers.
- Consider creating a 2–3 minute video to generate excitement and direct traffic to your site.

Measure:

As part of your engagement and adoption planning, think about how you can measure success.

- Choose success metrics that are important to your site's purpose and tie them to your overall business goals and key performance indicators.
- Think about which business processes are important and what you're looking to improve.
- Consider how to measure your return on investment with Salesforce or third-party analytics tools.

Define how to measure success for your business and use case. Here are some examples of use cases.

- For a self-service help portal, success could include an increase in site traffic along with a decrease in customer service calls and support costs.
- For an account management portal, measure how many new customers sign up and how many customers you retain within a time.
- Consider asking your site visitors to periodically take a customer satisfaction (CSAT) survey. Ask them directly how they feel about your site, and evaluate the responses and scores over time to identify trends.

Check out this video to learn more about promoting your site, and measuring its success.

Watch a video

Find Out More

Show Me How: Best Practices for Adoption in Your Sites (English Only)

Set Up and Configure Your Org for Experience Cloud Sites

Before setting up your first Experience Cloud site, complete a few tasks in Salesforce Setup to prepare your org for customer- and partner-facing sites. From enabling digital experiences to selecting the correct org settings, we've got you covered! The steps you take when preparing your org for Experience Cloud sites are the same you take when setting up sites for Commerce Cloud, Financial Services Cloud, Health Cloud, and Work.com.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Enable Digital Experiences

Enabling digital experiences is the first step to creating an Experience Cloud site, whether you're building a community, portal, help center, or website. You also need to enable digital experiences when setting up Commerce Cloud, Financial Services Cloud, Health Cloud, and Work.com.

Configure Digital Experiences Settings

Manage settings that apply to all sites built on Experience Cloud.

Configure a Custom Domain for Your Experience Cloud Site

To provide a branded experience for users who access your external-facing Salesforce content, serve your Experience Cloud sites on a domain that you own. With a custom domain, your users access your external-facing Experience Cloud site and its functionality through your branded URL, such as https://www.example.com. Also, with the many-to-many relationship between sites and custom domains, you can serve your external-facing content to meet your branding needs. For example, you can serve content from multiple Experience Cloud sites on one parent website, or serve multiple sites on one domain through custom paths. Because you can serve multiple sites on one domain, custom domains simplify the management of your domains and your corresponding network allowlists. And even if your Salesforce-hosted site URL changes due to a My Domain change, your custom domain remains constant, reducing the number of updates required.

Find Your Way Around Experience Workspaces

Experience Workspaces is your one-stop shop for building, setting up, and monitoring your Experience Cloud site. Access Builder and Administration workspaces to manage your site's setup and branding. Community managers can view dashboards for groups, members, feed activity, and license usage, and manage the community's reputation system. Moderators can see which items have been flagged for review.

Administer Your Experience Cloud Site

After creating your Experience Cloud site, take care of administrative tasks such as adding members, securing your data, defining what records are shown in your site and to whom, and enabling other features such as SEO.

Access Experience Cloud Sites in the Salesforce Mobile App

Accessing Experience Cloud sites from the Salesforce mobile app depends on several factors, including the type of template used to create the site and the licenses and permissions of site users.

Enable Other Salesforce Features in Experience Cloud Sites

Experience Cloud offers a platform to expose Salesforce features and functionality to site members. For example, enable Salesforce Knowledge so customers can view knowledge articles in your site. Enable case feeds to facilitate discussions over customer cases. There's also Chatter Questions, direct messages, Question-to-Case, and field service data.

Enable Digital Experiences

Enabling digital experiences is the first step to creating an Experience Cloud site, whether you're building a community, portal, help center, or website. You also need to enable digital experiences when setting up Commerce Cloud, Financial Services Cloud, Health Cloud, and Work.com.

Note: After you enable digital experiences, you can't disable it. If your org's access to Experience Cloud is suspended for non-payment, all your sites are deactivated, including the ones in Preview. When Experience Cloud is re-enabled, all sites are inactive. You can activate them, but you can't return to the Preview state.

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **Digital Experiences** > **Settings**.
2. Select **Enable Digital Experiences**.
   Your digital experiences domain is shown. It includes your My Domain name in the format `MyDomainName.my.site.com` for production orgs.
3. Click **Save**.

   Warning: In Salesforce orgs created before February 8, 2024, enabling digital experiences automatically extends access to external members. Records previously accessible to Roles and Subordinates are available to Roles, Internal and Portal Subordinates. Opening up access to the site and portal subordinates could expose your org's data to external users. To secure your sites, use the Convert External User Access Wizard to help ensure that no records or folders are shared with external users. For more information, see Use the Convert External User Access Wizard.

   In orgs created on February 8, 2024 or later, access is secure by default. Records shared with the Roles and Internal Subordinates group through sharing rules or other mechanisms remain accessible only to internal users.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To enable digital experiences:
- Customize Application

If you have the Create and Set Up Experiences permission, you can now create experiences.

- In Experience Builder sites and Lightning Experience, the App Launcher lets members switch between their Salesforce org and experiences that they're a member of.

- In Salesforce Tabs + Visualforce sites and Salesforce Classic, the global header lets users switch between their Salesforce org and experiences that they're a member of.

SEE ALSO:

Can I use the same domain name for my Salesforce Sites and my Experience Cloud Sites?

Who Can See What in Experience Cloud Sites

Enable the Global Header for Salesforce Tabs + Visualforce Sites

Enable the App Launcher in Experience Builder Sites

Configure Digital Experiences Settings

Manage settings that apply to all sites built on Experience Cloud.

1. From Setup, enter `Digital Experiences` in the Quick Find box, then click **Digital Experiences** > **Settings**.
2. Make your changes and save.

Setting	Description
Experience Management	
Enable Experience Workspaces	Use Experience Workspaces to manage your sites. This setting is on by default, but you can disable it.
Assign new records created by guest users to the default owner	When enabled, all new records created by guest users are assigned to a default record owner. If no default record owner is chosen, the default record owner is the site's owner.
Display warning for unsupported browsers	When enabled, users are asked to update or switch browsers when they access an Aura site with an unsupported browser. Display warnings are available by default in Lightning Web Runtime (LWR) sites.
Enable ExperienceBundle Metadata API	Provides access to the ExperienceBundle Metadata API, which allows text-based programmatic migration and creation of Aura sites. LWR sites use ExperienceBundle by default.
Role and User Settings	
Number of customer roles	You can have up to three roles. If you specify one customer role and then decide to increase the number of roles later, the increased number of roles isn't applied to existing customer accounts.
Number of partner roles	When you enable the first external user on a partner account, a user role hierarchy is created

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To change digital experience settings:

- Customize Application

Setting	Description
	for that account. The three roles are Partner User, Partner Manager, and Partner Executive. The role hierarchy rolls up to the account owner (typically, the channel manager). When you create contacts on the partner account and convert them to external users, assign one of these roles to them. If you specify one partner role and then decide to increase the number of roles later, the increased number of roles isn't applied to existing partner accounts.
Allow editing of the Partner Account field on opportunities and leads	Select to allow partner users to edit the Partner Account field.
Enable Partner Super User Access	Granting super user access to users with Partner Community licenses lets them access more data and records, regardless of sharing rules and org-wide defaults. Super users can access data owned by other site users who have the same role or a role below them. Super user access applies only to cases, leads, custom objects, and opportunities. External users have access to these objects only if you expose them using profiles or sharing and add the tabs to the portal.
Enable report options for external users	Select this option to give external users with Partner Community or Customer Community Plus licenses and the "Run Reports" permission, access to report options on the run report page.
Let customer users access notes and attachments	Select to let customer users access notes and attachments on accounts and contacts.
Allow customer users to change case statuses	Let users with Customer Community Plus licenses change their case status in Visualforce sites.
Allow users to see contacts that haven't been enabled for partner or customer accounts	Let users see contacts from private accounts that they have read access to when the contact is associated with the parent record of their own contact record.
Require unique usernames for partners in this org	Orgs created after Winter '19 automatically contain username uniqueness at the org level.
Allow using standard external profiles for self-registration, user creation, and login	Each external license type is associated with a default profile in the org. Enable this setting to let external users self-register and log in with the default external profile. Salesforce best practice is to clone the default profile and add all the permissions needed to the cloned profile.
Hide first and last name fields in SOAP API for site users, when making API calls from within a site with nicknames enabled	This setting applies to SOAP API when used in an Aura controller that is invoked from a Lightning component on an Experience Cloud site.
Hide badges from guest users in Experience Builder sites	Hide badges used in gamification from guest users in Aura sites.
Moderation Rule Settings	

Setting	Description
Moderation applies to all feed posts regardless of where they are visible	Apply moderation flags and rules to all feed posts, including those visible across multiple sites. When this setting is disabled, moderation applies only to site-specific feed posts.
Moderation rules can be configured for internal users' feed posts on records	Apply moderation rules to internal users' feed posts on records that might be visible across multiple sites.
Salesforce Mobile Settings for Experiences	
Support links to Visualforce pages from site pages made using Visualforce in the mobile app	Keep the Apex prefix in Experience Cloud site URLs so links between Visualforce pages resolve in Salesforce. Enabling this setting keeps the Apex prefix in all of your Experience Cloud site URLs.
New User Email Settings	
Link expires in [x] days	Select how many days you'd like an activation email to remain active.
Account Relationship Settings	
Enable Account Relationships	Enable to show Account Relationship objects and their associated sharing rules. After you enable this option, you can't disable it in your org.
External Account Hierarchy Settings	
Enable External Account Hierarchy	Enable to show External Account Hierarchy objects. After you enable this option, you can't disable it in your org.
Embedded Login	
Apply Login Page Type to Embedded Login	Applies the site's login page type (default, Login Discovery, Experience Builder, or Visualforce) to its Embedded Login implementations.
Block Redirect to Unknown URL	For the site's Embedded Login implementations, blocks redirects to unknown URLs that are provided in the state parameter of the OAuth response. Redirects are allowed only when the URL is in the same host or domain as the site or is allow-listed in the Embedded Login salesforce-allowed-domains meta tag.
Sharing Sets	
Create a sharing set	
Convert Site Member Access	
Convert Site Member Access	

Grant Super User Access to a Partner User

Partner super users can get insights into the records of other partner users who are at their role level or below them in the account role hierarchy. Super users can access records according to their level of permissions. For example, if a manager with full access to cases is granted Super User Access, then they can view and edit cases of other managers and their direct reports. A different manager who has read-only access to cases can only view the cases of other managers and their direct reports, even as a Super User.

Grant Portal Super User Access to Customer Users

Enable portal super user access so that users with Customer Community Plus licenses in your sites can access more records and data.

Create a Sharing Set for Experience Cloud Site Users

Give Experience Cloud site users access to records using sharing sets. A sharing set grants site users access to any record associated with an account or contact that matches the user's account or contact. You can grant access to records via access mapping, which defines access for each object in the sharing set. Access mappings support indirect lookups from the user and target record to the account or contact. For example, grant site users access to all cases related to an account that's identified on the user's contact records. A sharing set applies across all sites that a user is a member of. Record access granted to users via a sharing set isn't extended to their superiors in the role hierarchy.

External Account Hierarchies Considerations

Account records owned by users with roles in child accounts that are part of an external account hierarchy share data with the parent accounts in that hierarchy.

Use the Convert External User Access Wizard

In Salesforce orgs created before February 8, 2024, when you enable digital experiences, records previously accessible to Roles and Subordinates become available to Roles, Internal and Portal Subordinates. You can use the Convert External User Access wizard to not share records or folders with external users.

Grant Super User Access to a Partner User

Partner super users can get insights into the records of other partner users who are at their role level or below them in the account role hierarchy. Super users can access records according to their level of permissions. For example, if a manager with full access to cases is granted Super User Access, then they can view and edit cases of other managers and their direct reports. A different manager who has read-only access to cases can only view the cases of other managers and their direct reports, even as a Super User.

A few things to consider before you grant super user access to users.

- Select the **Enable Partner Super User Access** setting in your Digital Experience settings before granting access to individual partner users. To disable super user access, deselect **Enable Partner Super User Access**. If you re-enable this feature, all users who were assigned super user access previously get super user access again.
- Partner super user access applies only to cases, leads, custom objects, and opportunities.
- Partner super users have access based on their user permissions.
-

Partner Super Users with Role	Can Access Data Owned By or Shared With
Partner Executive	– All partner users and partner super users in the same role – Manager and User roles below them in the hierarchy

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To enable Partner Super User Access:

- Customize Application

Partner Super Users with Role	Can Access Data Owned By or Shared With
Partner Manager	– All partner users and partner super users in the same role – User roles below them in the hierarchy
Partner User	All partner users and partner super users in the same role (User roles only)

- Use this information to grant super user access to users with Partner Community licenses.

1. View the contact record for the user on the partner account.
2. If you're using Salesforce Classic, click **Manage External Account**, then choose **Enable Super User Access**, and click **OK**.
3. If you're using Lightning Experience, click the dropdown menu and select **Enable Super User Access**.

You can grant Portal Super User access to users with Customer Community Plus licenses.

Grant Portal Super User Access to Customer Users

Enable portal super user access so that users with Customer Community Plus licenses in your sites can access more records and data.

The Portal Super User permission lets users with the Customer Community Plus license do the following on your accounts:

- View, edit, and transfer cases to other Customer Community license users
- Create cases for contacts
- View and edit all contacts, whether communities-related or not
- View account details when they're the contact on a case
- Run reports on all contacts, whether portal enabled or not

Note: Requires Reports tab to be added to your site and the Run Reports permission.

Note: You can give users with Partner Community licenses Partner Super User access on page 31 directly from their contact record, giving more access to more objects to partner users.

Add the Portal Super User permission to a permission set and assign it to Customer Community Plus users. The permission set gives Customer Community Plus users access to their account and view and edit permission on the account cases and contacts without permission to manage other external users. When Customer Community Plus users with the Portal Super User permission create contacts, the ownership of those contacts defaults to the channel manager associated with the user's account.

1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.
2. Either create or clone a permission set.
3. In the App Permissions section, add the Portal Super User permission.
4. Click **Save**.
5. Assign the permission set to your Customer Community Plus users by clicking **Manage Assignments** and then adding the appropriate users.

Create a Sharing Set for Experience Cloud Site Users

Give Experience Cloud site users access to records using sharing sets. A sharing set grants site users access to any record associated with an account or contact that matches the user's account or contact. You can grant access to records via access mapping, which defines access for each object in the sharing set. Access mappings support indirect lookups from the user and target record to the account or contact. For example, grant site users access to all cases related to an account that's identified on the user's contact records. A sharing set applies across all sites that a user is a member of. Record access granted to users via a sharing set isn't extended to their superiors in the role hierarchy.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To create or update sharing sets:
- Customize Application

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **Digital Experiences** > **Settings**.
2. In the Sharing Sets related list, click **New** to create a sharing set, or click **Edit** to edit a sharing set.
3. In the Sharing Set Edit page, fill in the **Label** and **Sharing Set Name** fields. **Label** is the sharing set label as it appears on the user interface. **Sharing Set Name** is the unique name used by the API.
4. Enter a description.
5. Select the profiles of the users to whom you want to provide access.

   Note: You can have one sharing set per profile only.

6. Select the objects you want to grant access to. You can use sharing sets with these objects.
   - Account (Account sharing sets can control access to Contract, Entitlement, and OrderItem objects.)
   - AdvAccountForecastFact
   - AdvAcctForecastSetPartner
   - AntiCorruptionInitSum
   - Assessment
   - AssessmentQuestion
   - AssessmentQuestionAssignment
   - AssessmentQuestionResponse
   - AssessmentQuestionSet
   - Asset
   - AuthApplicationAsset
   - AuthApplicationPlace
   - AuthLocationAccessSchedule
   - Award
   - BusinessLicense
   - BusinessLicenseApplication
   - BusinessMilestone
   - BusRegAuthTypeDependency
   - Campaign
   - Case

- Claim
- ClaimCoverage
- ClaimRecoveryDocumentEnvelope
- CommissionSchedule
- ComplaintCase
- Contact
- CourseOffering
- CourtAction
- Custom Objects
- CustomerProperty
- DisclsReportingPeriod
- DivrsEquityInclSum
- DocumentTemplate
- DocumentTemplateClause
- EconomicPerformanceSum
- EmpBenefitSummary
- EmployeeDemographicSum
- EmployeeDevelopmentSum
- EnrolleeBenefit
- Examination
- FinancialDeal
- FinancialDealParty
- FinancialDealProduct
- FulfillmentOrder
- GeneratedDocument
- GoalDefinition
- GovtFinancialAsstSum
- Individual
- IndividualApplication
- InfoAuthorizationRequest
- InsurancePolicy
- Interaction
- InteractionSummary
- Knowledge (Sharing for Knowledge is available only when the Knowledge standard sharing org preference is enabled.)
- Lead (Contact Salesforce Customer Support to enable.)
- LoyaltyProgramPartner
- MfgProgramCpntFrcstFact
- MfgProgramForecastFact
- MfgProgramVariantFrcstFact
- MultipartyInfoAuthRequest

- OmniProcessAsmtQuestionVer
- Opportunity
- Order
- OrderSummary
- OrgIncidentSummary
- PartnerFundAllocation
- PartnerFundClaim
- PartnerFundRequest
- PartnerMarketingBudget
- PartyIncome
- PaymentRequest
- PersonEducation
- PersonExamination
- PersonLifeEvent
- Polygon
- PreliminaryApplicationRef
- ProcessException
- Producer
- ProducerCommission
- PublicComplaint
- PublicProgram
- RebateMemberProductAggregate
- RebateProgram
- RebateProgramMember
- RecordAlert
- RegulatoryCodeViolation
- RegulatoryTrxnFee
- RevenueTransactionErrorLog
- SalesAgreement
- SecuritiesHolding
- ServiceAppointment
- ServiceContract
- SocialContributionSum
- TaxDisclosureSummary
- TrainingCourseParticipant
- TrnCourse
- UnitOfMeasureConversion
- User
- WorkOrder
- WorkerCompCoverageClass

The Available Objects list excludes:

- Objects with an org-wide sharing setting of Public Read/Write
- Custom objects that don't have an account or contact lookup field

Note: Sharing sets for contacts, cases, and opportunities don't automatically grant access to these objects' parent accounts. To grant access, include the account in the sharing set as well.

7. In the Configure Access section, click **Set Up** or **Edit** next to an object name to configure access for the selected profiles, or click **Del** to remove access settings for an object.

   Note: Objects with **Set Up** in the Action column aren't configured for high-volume user access. Until you configure an object, high-volume users have limited or no access to its records.

8. Grant access based on an account or contact lookup.
   - To determine the account or contact lookup on the user, select a value in the User dropdown list.
   - To determine the account or contact lookup on the target object, select a value in the Target Object field.

   For example, to grant access to all cases associated with an account identified on the user's contact record, select `Contact.Account` and then `Account`.

   If you created a user from a contact to multiple accounts, you can grant access to all records with a lookup to any accounts related to that contact. Select `Contact.RelatedAccount` and `Account` respectively, and make sure that the relevant account-contact relationships are active.

   Note: Both selected fields must point to either an account or contact. For example, `Contact.Account` and `Entitlement.Account` both point to an account.

9. Choose an access level of Read Only or Read/Write. (If the object's organization-wide sharing setting is Public Read Only, then only Read/Write is available.)
10. Click **Update**, then click **Save**.

After creating a sharing set, create share groups to give internal users access to records created by high-volume site users.

Note: Share groups functionality isn't available to users with Customer Community Plus and Partner Community licenses.

Learn more about site-specific sharing in this video.

Watch a video

Use Share Groups to Share Records Owned by High-Volume Experience Cloud Site Users

Share groups allow you to share records owned by high-volume Experience Cloud site users with authenticated internal and external users.

Use Share Groups to Share Records Owned by High-Volume Experience Cloud Site Users

Share groups allow you to share records owned by high-volume Experience Cloud site users with authenticated internal and external users.

High-volume users are limited-access Experience Cloud site users, intended for orgs with many thousands to millions of external users. Because high-volume users don't have roles, performance issues associated with role hierarchy calculations are eliminated. Use a share group to share records owned by high-volume site users.

Note: You can't use share groups to share records owned by high-volume users with guest users. Instead, use guest user sharing rules. See Create Guest User Sharing Rules in Salesforce Help for more information.

Share groups apply across Experience Cloud sites and are associated with sharing sets.

Let's look at a quick video that describes how share groups work: Who Sees What in Communities: Community-Specific Sharing.

To set up share groups:

1. From Setup, enter `Settings` in the `Quick Find` box, then select **Digital Experiences** > **Settings**.
2. Click the name of the sharing set you want to associate your new share group.
3. Click the Share Group Settings tab.
4. Click **Activate** to turn on the share group.

   Activating the share group can take a while. You receive an email when the process finishes.

   Note: Deactivating a share group removes *all* other users' access to records owned by high-volume users. An email isn't sent to you when the deactivation process finishes.

5. Click **Edit** to add users to the share group. You can add both internal users from your org as well as external users from the same parent account as the high-volume user.
   a. From the Search dropdown, select the type of member to add.
   b. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
   c. Select members from the Available Members box, and click **Add** to add them to the group.
   d. Click **Save**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To share records owned by high-volume Experience Cloud site users to other users:

- Customize Application

External Account Hierarchies Considerations

Account records owned by users with roles in child accounts that are part of an external account hierarchy share data with the parent accounts in that hierarchy.

Note: This feature is available in orgs with Partner or Customer Community Plus licenses.

When using an external account hierarchy, be aware of these considerations:

- Child account data is shared with the highest role at each level within the external account hierarchy.
- If Grant Access Using Hierarchies is enabled on a custom object, data shared with or owned by users is visible to the roles above those users. If Grant Access Using Hierarchies is disabled, data shared with or owned by a user isn't visible to users in roles above them.
- You can add up to five hierarchical levels in an external account hierarchy. Contact your Salesforce account executive if you need more levels.
- You can use an external account hierarchy only for business accounts, not person accounts.
- External account hierarchies are incompatible with account role optimization (ARO).
- Internal owners of child accounts that participate in an external account hierarchy can't manage external users in the account that they own. They lose access to the records owned by those users.
- Accounts used in an external account hierarchy can't be merged with another account.
- An external account hierarchy must have at least one role. If a user attempts to delete the last role in an account that belongs to an external account hierarchy, the user gets an error.
- The hierarchy can contain either a partner account or a customer account, but not both.
- You can't use a customer or partner account in more than one active external account hierarchy.
- You can have up to 100,000 external account hierarchy records per org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To change digital experience settings:
- Customize Application

Use the Convert External User Access Wizard

In Salesforce orgs created before February 8, 2024, when you enable digital experiences, records previously accessible to Roles and Subordinates become available to Roles, Internal and Portal Subordinates. You can use the Convert External User Access wizard to not share records or folders with external users.

Note: In orgs created on February 8, 2024 or later, records shared with the Roles and Internal Subordinates group through sharing rules or other mechanisms remain accessible only to internal users. You aren't required to use the Convert External User Access Wizard to secure access.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and then select **Digital Experiences** > **Settings**.
2. Click the **Convert Site Member Access** link.
3. Select the checkboxes next to the sharing rules that you want to convert to Roles and Internal Subordinates. If there are no sharing rules to convert but you want to convert the access level for folders, proceed to the following step.
4. Click **Next**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To use the Convert External User Access Wizard:
- Customize Application

5. Select the checkboxes next to the folders whose access levels you want to change to Roles and Internal Subordinates.

   The wizard doesn't convert folders that are accessible to all users or accessible to public groups. You must manually update the access levels on those folders.

   A particular folder can display on multiple rows in the wizard, for example a row for each Role, Internal and Portal Subordinates category to which a folder is shared.

6. Click **Next**, then click Save to apply your changes.

The Convert External User Access Wizard doesn't convert access for these features or sharing mechanisms:

- Manual sharing
- Apex managed sharing
- Public groups
- Queues
- List views

For information on manually updating access to the Roles and Internal Subordinates category, see Considerations for the Convert External User Access Wizard.

Considerations for the Convert External User Access Wizard
Keep these considerations and limitations in mind when using the Convert External User Access Wizard.

Considerations for the Convert External User Access Wizard

Keep these considerations and limitations in mind when using the Convert External User Access Wizard.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: In Salesforce orgs created on February 8, 2024 or later, records shared with the Roles and Internal Subordinates group through sharing rules or other mechanisms remain accessible only to these internal users. You aren't required to use the Convert External User Access Wizard to secure access.

In orgs created before February 8, 2024, you must use the Convert External User Access Wizard to secure access for external users.

Features Covered by the Convert External User Access Wizard

The wizard affects the following features in your Salesforce org:

Sharing Rules

The Convert External User Access wizard can convert any owner-based or criteria-based sharing rules that include the Roles, Internal and Portal Subordinates to include the Roles and Internal Subordinates instead.

The Roles and Internal Subordinates data set category allows you to create sharing rules that include all users in a specified role plus all users in roles below that role, excluding any site roles.

Note: After running the Convert External User Access wizard, you must recalculate the sharing rules to apply the changes. From Setup, in the Quick Find box, enter `Sharing Settings`. On each object's sharing rule section, click **Recalculate**, then click **OK**.

The Roles, Internal and Portal Subordinates data set category is only available in your organization after you create at least one role in the role hierarchy.

The Roles and Internal Subordinates data set category is only available in your organization after you create at least one role in the role hierarchy and enable digital experiences.

Folder Sharing

The Convert External User Access wizard also enables you to automatically convert the access levels of any report, dashboard, or document folders that are accessible to Roles, Internal and Portal Subordinates to a more restrictive access level: Roles and Internal Subordinates. This helps prevent external users from accessing folders. Using the wizard is more efficient than locating various folders in Salesforce and setting their access levels individually.

The wizard doesn't convert folders that are accessible to all users or accessible to public groups. You must manually update the access levels on those folders.

Features Not Covered by the Convert External User Access Wizard

The wizard doesn't convert access for the following features or sharing mechanisms, but you can follow these recommendations to manually secure external users' access to your org's data.

Manual Sharing

Remove Roles, Internal and Portal Subordinates from the Share With list of your manual shares, and add Roles and Internal Subordinates instead.

To identify manual shares that are shared with Roles, Internal and Portal Subordinates, use this SOQL query:

```
Select Id, UserOrGroupId from AccountShare where UserOrGroupId IN (SELECT Id FROM Group

WHERE Type = 'RoleAndSubordinates') AND RowCause = 'Manual'
```

Replace `AccountShare` with the share object that you're querying.

Apex Managed Sharing

Update your Apex code so that it creates shares to the Role and Internal Subordinates group. Because this conversion is a large-scale operation, consider using batch Apex.

Public Groups

Review public groups that contain Roles, Internal and Portal Subordinates members. Remove these members and replace with Role and Internal Subordinates as required.

To identify public groups that contain Roles, Internal and Portal Subordinates members, use this SOQL query:

```
Select Id, GroupId, UserOrGroupId from GroupMember where GroupId in (SELECT Id FROM
Group WHERE Type = 'Regular') AND UserOrGroupId in (SELECT Id FROM Group
WHERE Type = 'RoleAndSubordinates')
```

Queues

Review queues that contain Roles, Internal and Portal Subordinates members. Remove these members and replace with Role and Internal Subordinates as required.

To identify queues that contain Roles, Internal and Portal Subordinates members, use this SOQL query:

```
Select Id, GroupId, UserOrGroupId from GroupMember where GroupId in (SELECT Id FROM
Group WHERE Type = 'Queue') AND UserOrGroupId in (SELECT Id FROM Group
WHERE Type = 'RoleAndSubordinates')
```

List Views

Update list views to be shared with Role and Internal Subordinates instead of Roles, Internal and Portal Subordinates.

Configure a Custom Domain for Your Experience Cloud Site

EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions. Also available with Marketing Cloud Account Engagement (Pardot) in **Professional** Edition.

Applies to: LWR, Aura, and Visualforce sites

To provide a branded experience for users who access your external-facing Salesforce content, serve your Experience Cloud sites on a domain that you own. With a custom domain, your users access your external-facing Experience Cloud site and its functionality through your branded URL, such as https://www.example.com. Also, with the many-to-many relationship between sites and custom domains, you can serve your external-facing content to meet your branding needs. For example, you can serve content from multiple Experience Cloud sites on one parent website, or serve multiple sites on one domain through custom paths. Because you can serve multiple sites on one domain, custom domains simplify the management of your domains and your corresponding network allowlists. And even if your Salesforce-hosted site URL changes due to a My Domain change, your custom domain remains constant, reducing the number of updates required.

You can set up a custom domain to serve your sites at any time. When you set up a custom domain as you build your Experience Cloud sites, your visitors use your branded custom domain from the start. This approach can improve your SEO and eliminate future effort to update hard-coded links and change user behavior.

To learn more and set up a custom domain, see Custom Domains.

If you serve your site content on a custom domain, we also highly recommend that you use a content delivery network (CDN) to optimize your content and site performance. For more information, see Content Delivery Networks (CDNs) and Salesforce . If you set up a custom domain in a Professional Edition org with Marketing Cloud Account Engagement (Pardot), that domain must use the Salesforce CDN.

SEE ALSO:

- Experience Cloud
- Custom Domains
- Serve Your Experience Cloud Site with the Salesforce Content Delivery Network (CDN)

Find Your Way Around Experience Workspaces

Experience Workspaces is your one-stop shop for building, setting up, and monitoring your Experience Cloud site. Access Builder and Administration workspaces to manage your site's setup and branding. Community managers can view dashboards for groups, members, feed activity, and license usage, and manage the community's reputation system. Moderators can see which items have been flagged for review.

Note: You can customize your site at any time, but if you plan on making major changes, we recommend deactivating the site first.

If Experience Workspaces isn't enabled in your org, enable it in **Digital Experiences** > **Settings** . Experience Workspaces is enabled by default for all Experience Cloud sites created after Spring '17.

Important: The options available in Experience Workspaces are based on your site template selection and preferences. That's what's happening when some options in the following list don't appear in your site. To display all sections, go to **Administration** > **Preferences**, and select **Show all settings in Experience Workspaces**.

Experience Workspaces includes the following workspaces.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management:

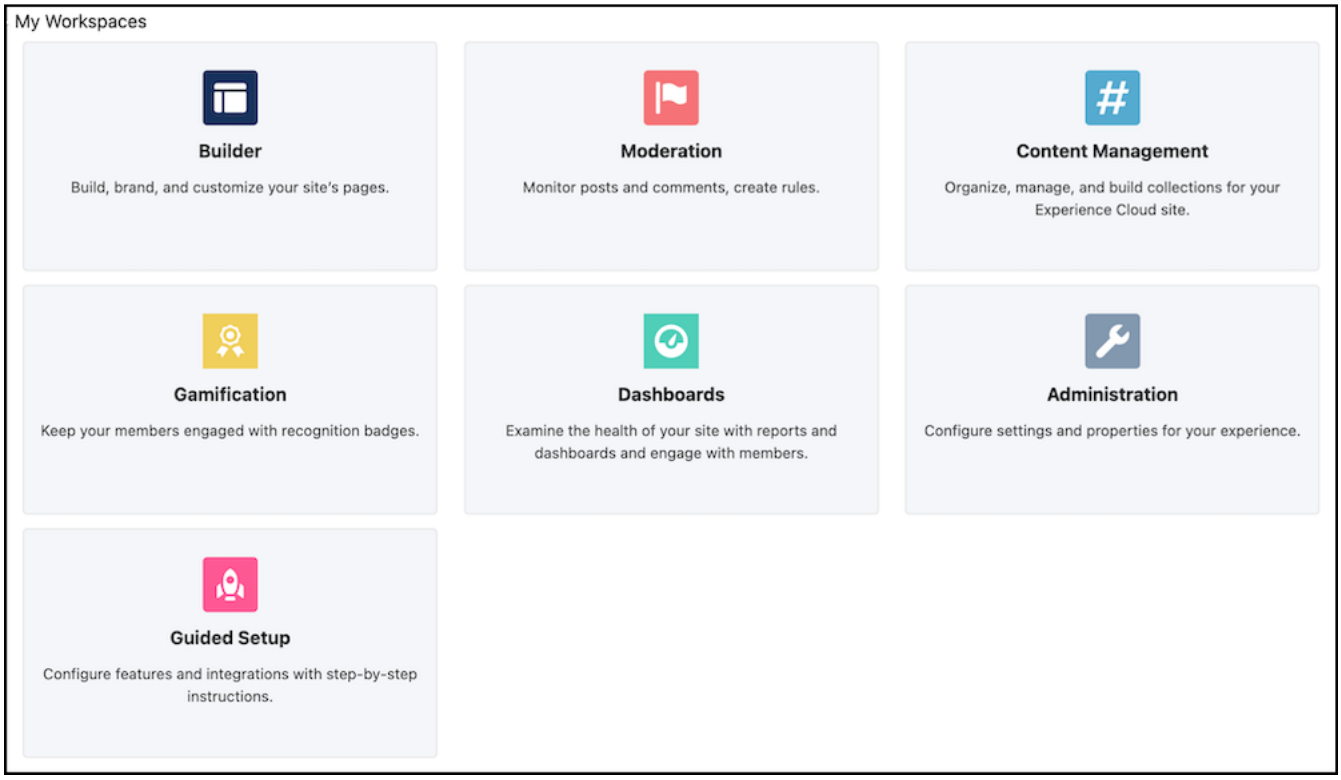
- Access Experience Management OR Manage Experiences OR Create and Set Up Experiences
- AND is a member of the site

To access moderation rules and criteria:

- Manage Experiences OR Create and Set Up Experiences
- AND is a member of the site

To customize administration settings or use Experience Builder:

- Create and Set Up Experiences
- AND is a member of the site



Builder

Experience Builder lets you brand and design your pages. Create and customize pages, modify or add Lightning components, customize the site's navigation menu, and manage page-level settings.

Moderation

From the Home tab in Moderation, view your site's home page dashboard and reports for flagged posts, comments, messages, and files. From the Rules tab, administrators can set up moderation rules and content criteria for the community.

Note: If your home page still displays a message to install the Salesforce Experience Management package, your administrator hasn't mapped a dashboard yet.

Content Management

Add CMS content to your site and manage your site's Topics and Recommendations from the Content Targeting workspace. Create a navigation menu and showcase popular topics in your site from the Topics tab. Drive engagement from the Recommendations tab. Dynamically render headers, footers, banners, CSS, JavaScript, and other CMS content on your pages.

Gamification

Use gamification tools to keep your site members engaged, like Recognition Badges and Reputation.

Dashboards

View dashboards and reports for your site. The administrator sets up dashboards that display in the Reporting tabs. Monitor activity and take immediate action in your site from the Engagement tab using Insights.

Administration

From the Administration workspace, you can update the basic setup of your site. Configure preferences, manage membership and site contributors, set reputation levels and points to reward members for activity in the feed. Configure tabs, select branding properties to apply, and customize your site's login experience. Determine which pages are available to your site, customize email templates, and configure URL redirects. You can also create your own app with Rich Publisher Apps, or get one from AppExchange.

Guided Setup

Configure features with Guided Setup. It walks you through setting up visibility, processes, workflows, record types, layouts, and assignment rules for Salesforce features. Each setup step gives easy-to-follow directions and navigable links to setup pages.

Important: If you're an administrator and accidentally remove yourself from a site, you can't access the Administration settings in Experience Workspaces. To add yourself back to the site or to make other membership updates, use the API.

Note: If you set clickjack protection for your site to the level for the most protection, pages in some workspaces, including Administration, appear as blank pages. To avoid this problem, use the recommended setting. If you encounter this issue, in Setup, enter `Custom URLs` in the Quick Find box, and select **Custom URLs**. Click the label for the site (not the Site.com link), and reset the clickjack protection level to the recommended setting.

Configure Settings in Your Administration Workspace

Configure settings in your administration workspace, and enable other optional features in your Experience Cloud site such as user nicknames, guest access, private messages, direct messages, content flagging, and reputation levels.

Streamline Customer Support with Customer Insights

Customer Insights informs support agents working in the Service Console whether the customer has looked at the pertinent documentation. It also shows if the customer has filed a case before calling support. As a result, agents don't suggest articles that a customer has accessed or open duplicate cases, decreasing customer frustration and improving support.

Update Your Experience Cloud Site's Name, Status, and Description

Manage your Experience Cloud site name, description, status, and template all from one location.

Key Concepts in Page Redirection in Aura and LWR Sites

Page redirects help maintain the discoverability and SEO equity of your sites in Experience Cloud. Learn some of the key concepts and considerations before you set up page redirection in your Aura and Lightning Web Runtime (LWR) sites.

Configure Settings in Your Administration Workspace

Configure settings in your administration workspace, and enable other optional features in your Experience Cloud site such as user nicknames, guest access, private messages, direct messages, content flagging, and reputation levels.

To use these settings, Chatter must be enabled in your org.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Change the desired settings.
   - General
     - Show nicknames instead of full names in your site. Enabling nickname display allows more privacy and protects member identities. This protection is especially helpful in a public site where unregistered visitors can access member profiles.
     - Enable Chatter messages, which let members have secure private conversations with other Chatter users. To expose Chatter messages for external users, administrators must also enable the Chatter tab in sites using the Salesforce Tabs + Visualforce template.
     - Enable direct messages, which allows members to have secure private conversations in sites built using the Customer Service template.
     - Optimize cached images for guest users on all devices. Resize images for faster loading on all devices. This feature is available when you use Salesforce's CDN for Digital Experiences.
     - Let guest users view asset files and CMS content available to the site. Asset files include images associated with topics, recognition badges, site branding, and account branding. If public access is enabled in Experience Builder at the page or site level, this preference is automatically enabled. To ensure that guest users can view CMS collections on your LWR site's public pages, also enable Allow guest users to access public APIs.
     - Use custom Visualforce error pages, if you want authenticated users to see your custom branded Visualforce error pages.
     - Show all settings in Workspaces that are hidden by default based on how you set up your site. Enabling this setting overrides the dynamic navigation provided in Experience Workspaces.
   - Experience Management
     - Allow members to flag posts, comments, or files for moderation on page 797. Members can flag items that contain inappropriate language or sensitive information.
     - Enable Upvotes and Downvotes to allow members to participate in evaluating the worth of a question or answer. Up and down voting is enabled by default in sites created as of Winter '18 and later.
     - Enable Reputation on page 843 to allow community managers to set up a point system that rewards users who participate in the site. Administrators set up corresponding reputation levels that users see on their profile.
     - Enable knowledgeable people on page 843so you can discover who's knowledgeable on topics and endorse people for their knowledge on a topic.
   - Files
     - Set the maximum size in MB for uploaded files.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

- Specify the types of files that can be uploaded.

4. Click **Save**.

These additional optional features can be found in Setup and other areas of Experience Workspaces.

- Assign Permission to Verify Answers for Your Company to allow selected members to mark an answer as company verified.
- Assign Post Pinning Permission to allow selected members to pin a critical post to the top of a group or topics feed.
- Assign a Default Experience to a User Profile to associate that profile with a specific Experience Cloud site. Notification emails about site-agnostic objects, like cases, accounts, and opportunities, take on the default site's branding. Links in the emails take users to the default site—no more news from nowhere.
- Add Rich Publisher Apps to Your Feeds to enhance your feeds with items that are unique to your business process.

SEE ALSO:

Show Nicknames Instead of Full Names in an Experience Cloud Site

Give Secure Access to Unauthenticated Users with the Guest User Profile

Use Custom Visualforce Error Pages for Authenticated Users

Enable Members to Flag Items in Your Experience Cloud Site

Enable Reputation in Your Experience Cloud Site

Limit Files in Your Experience Cloud Site

Streamline Customer Support with Customer Insights

Customer Insights informs support agents working in the Service Console whether the customer has looked at the pertinent documentation. It also shows if the customer has filed a case before calling support. As a result, agents don't suggest articles that a customer has accessed or open duplicate cases, decreasing customer frustration and improving support.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Set Up Customer Insights

Enable Customer Insights in your org and then set it up for each Experience Builder site you have.

Considerations When Using Customer Insights

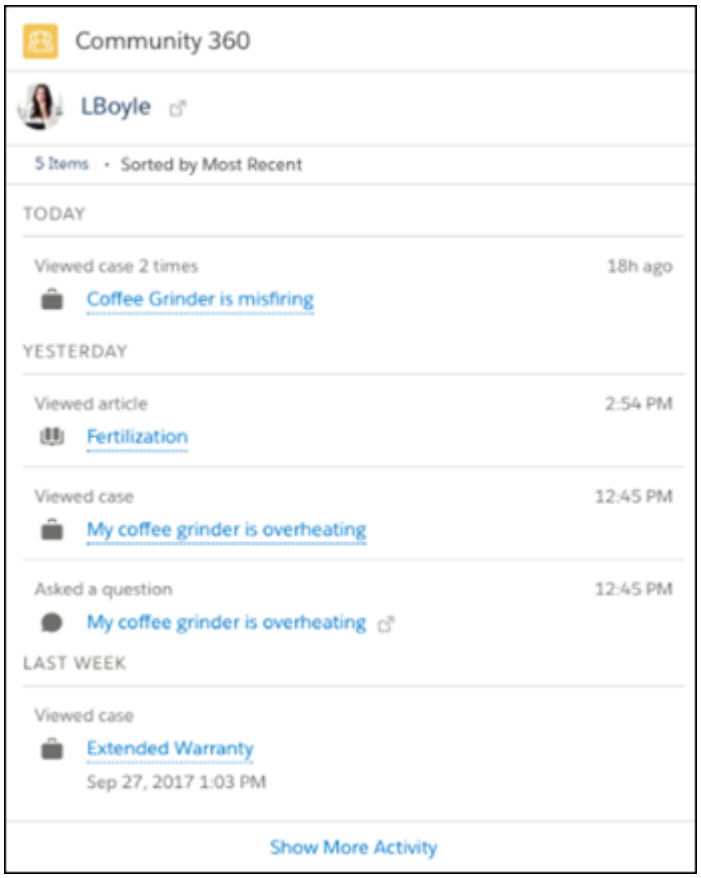
When you enable Customer Insights in your org, you're allowing data to be gathered from site members and stored in Salesforce. Here are some things to keep in mind when using Customer Insights.

Set Up Customer Insights

Enable Customer Insights in your org and then set it up for each Experience Builder site you have.

1. Open Experience Workspaces.
2. Select **Administration** > **Preferences**.
3. Select **Gather Customer Insights data**.
4. Click **Save**.
5. Assign the **View Customer Insights** profile permission to the customer support profiles that require it.
6. If you're using Salesforce console in Lightning Experience, open Lightning App Builder and simply drag the Customer Insights component to any case or contact page layout.
7. If you're using Salesforce console in Salesforce Classic, add the Customer Insights component by placing its Custom Console Component on the contact or case page layout. We recommend placing the component in the left sidebar, stacked, with a 400 pixel width.

   Your support agents see if the customer has opened a case, and which articles have been viewed in a site directly in the Service Console app.



Note:

- Customer Insights checks the following: assets, contracts, cases viewed, articles viewed, article votes, posts made, posts viewed, custom objects, orders, products, and tasks.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Customer Insights in a site:

- Access Experience Management OR Manage Experiences

  AND

  Is a member of the site

To edit profiles:

- Manage Profiles and Permission Sets

  AND

  Customize Application

To create and save Lightning pages in Lightning App Builder:

- Customize Application

- Customer Insights data is stored in the `NetworkUserHistoryRecent` object. API access to the object is limited to users with the "Modify All Data" permission.
- Customer Insights isn't available in sandbox environments.
- Articles viewed through the Case Deflection component aren't listed on the Community 360 component that can be added to the contact layout.

SEE ALSO:

Add Console Components to Page Layouts in Salesforce Classic

Considerations When Using Customer Insights

When you enable Customer Insights in your org, you're allowing data to be gathered from site members and stored in Salesforce. Here are some things to keep in mind when using Customer Insights.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Customer Insights gathers and stores page views of logged-in site members. Agents can view activity on articles, assets, contracts, custom objects, discussions, orders, products, and tasks.
- When you enable Customer Insights, you are authorizing data to be gathered from all logged-in site members. You can't exclude specific profiles from being tracked.
- Only Salesforce users with the View Customer Insights profile permission see the Customer Insights data.
- Customer Insights isn't supported in sites created using the Salesforce Tabs + Visualforce template.
- Customer Insights is only available for business accounts, not person accounts.
- Customer Insights doesn't track Salesforce for Android and Salesforce for iOS activity.
- If Customer Insights is enabled and **Data Protection and Privacy** is turned on, privacy settings must be complete for information to stay updated. To avoid missing information, make sure you:
  - Set up the Individual object with the fields you want to track.
  - Add the **Individual** field to the Contacts page layout.
  - From the Individual object, create records for the users you want to track with Customer Insights.
  - Connect user accounts with their Individual records. From a Contact record, find the **Individual** field, and search for the associated user.

  For more information on data protection and the Individual object, see Set Up Tracking and Storage of Certain Data Privacy Preferences.

Update Your Experience Cloud Site's Name, Status, and Description

Manage your Experience Cloud site name, description, status, and template all from one location.

You can change your site name and URL after the site is activated, but users aren't redirected to the new URL. So be sure to inform your members before changing the name or URL.

1. Open Experience Workspaces.
2. Click **Administration** > **Settings**.
3. Edit your settings as needed.
   - Select next to the site you want to change, and make your changes. You can change your URL from this page. However, if you've already activated your site, users aren't redirected to the new URL.
   - Manage the status of your site.
   - Change the template.

SEE ALSO:

Change Your Experience Cloud Site Template

Experience Cloud Site Statuses

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Key Concepts in Page Redirection in Aura and LWR Sites

Page redirects help maintain the discoverability and SEO equity of your sites in Experience Cloud. Learn some of the key concepts and considerations before you set up page redirection in your Aura and Lightning Web Runtime (LWR) sites.

Internal Redirects

To redirect users away from one Experience Builder site page to another page on the same site, create an internal redirect. To configure internal redirects for a site that exists on multiple domains, create redirect entries with the corresponding path prefixes for all of the domains. For example,

```
MyDomainCommunity/s/source, /target
/CustomDomainCommunity/s/source, /target
```

Keep the following in mind when creating an internal redirect:

- The source URL is the Experience Builder site page that you want to direct your users away from.
- The target URL is the page in the same Experience Builder site that you want to redirect your users to.
- For the source and target URLs, include everything after the domain name.

External Redirects

You can also set up external redirects, which redirect users to or from a page outside of your Aura or LWR site. Keep the following in mind when creating external redirects:

- To create an external redirect add the source and target URLs to a CSV file.
- The source URL is the page that you want to direct your users away from.
- The target URL is the page that you want to redirect your users to.

Static and Dynamic Redirects

Static page redirects point a user from one URL to another. You essentially tell Salesforce where to send a user based on the URL they were trying to reach. Let's say your users are trying to reach `www.mysite.com/homepage`. However, you've replaced the site with `www.mysite.com/home-page`. At that point, you create a redirect from the first site to the second.

Dynamic URL redirect rules use a pattern to identify a URL and automatically redirect a user to a new URL based on that pattern. Dynamic rules are especially helpful when you create user-friendly URL slugs for custom objects and your product and category pages in Salesforce B2C Commerce stores. Keep these points in mind when creating dynamic redirect rules:

- Only LWR sites support dynamic redirect rules.
- There's a limit of 100 dynamic redirect rules per org.
- Redirect rules require a source and a target.
- You can use dynamic redirect rules for internal and external redirects.

When using dynamic rules, the system compares the URL that the customer enters to the source URL. If the patterns match, then the customer is redirected to the target URL.

Here's the availability of static and dynamic redirect rules in Aura and LWR sites.

	Aura		**LWR**	
	Static	**Dynamic**	**Static**	**Dynamic**
Redirects **from** registered custom domain URLs previously hosted outside Salesforce	Yes	No	Yes	Yes
Redirects **to** URLs hosted outside Salesforce	Yes	No	Yes	Yes
Redirects between site pages hosted on Salesforce domains	Yes	No	Yes	Yes
Redirects that include query params in source and target URLs	Yes	No	Yes	Yes

Note: Dynamic redirects don't work for URLs that start with `/secur`, end with `.css`, or have `lastmod=`.

Redirect Users to Your Aura and LWR Site Pages

Set up page redirects on your Aura and Lightning Web Runtime (LWR) sites in Experience Cloud. To set up URL redirects from a page in your site to an external target, add the source and target URLs to a CSV file and then import the file in the Administration workspace.

To delete or deactivate existing redirects, use the Lightning Platform REST API to interact with the SiteRedirectMapping object. Don't import a blank CSV file from the URL Redirects page.

Keep these points in mind when importing CSV files:

- The redirects go live as soon as you upload them successfully.
- Importing a new CSV file overwrites the existing redirect file.
- The CSV file of redirects has a 4-MB file size limit.
- In Aura sites, variables and wildcards in the URLs aren't supported, so provide the exact URL string.

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

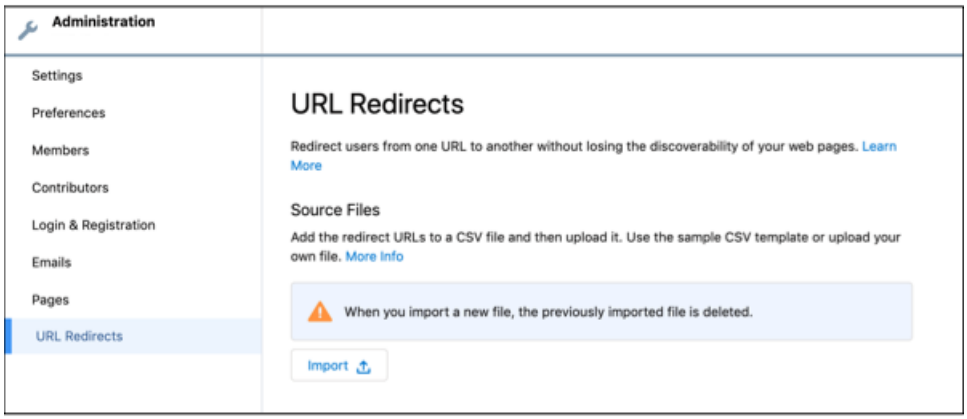
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



1. In Experience Workspaces, go to **Administration** > **URL Redirects** > **Import**.
2. If you plan to add URL redirects without replacing existing redirect rules, first export your existing redirects as a CSV file.

3. Add the new URLs to the file you downloaded, and then import the CSV file again. If the file size is 10,240 bytes or smaller and uploads successfully, a summary of your most recent import appears on the URL Redirects page. If the file size exceeds 10,240 bytes, or if the total number of URLs previously imported is more than 100, an email notifies you of the import status.

Example: **CSV for Internal Redirects**

In this example, `https://MyDomainName.com/TargetSite/s/account/001RM000005Su9JYAS/acme` redirects to `https://MyDomainName.com/TargetSite/s/newaccount/001RM000005Su9JYAS/acme`.

This example outlines the format to use when redirecting from one Experience Builder site page to another page in the same site.

```
/source, /target
/TargetSite/s/account/001RM000005Su9JYAS/acme, /newaccount/001RM000005Su9JYAS/acme
```

If a source URL's page is still available to users, internal redirects from that URL occur only if a user navigates to the source URL by using their browser. If a user clicks an available source URL through a site page, such as Global Search Results or Top Articles, the user is directed to that URL instead and isn't redirected to the target URL.

CSV for External Redirects in Aura Sites

Go to your site's Administration workspace, and under Pages click **Go to Site.com Studio.** Then see Creating URL Redirects in Site.com for more information.

In this example, `https://MyDomainName.com/case/oldCaseLocation` redirects to `https://MyDomainName.com/TargetSite/s/case/500RM000003UjsEYAS/my-case-2`.

This example outlines the format to use when creating external redirects. For the source URL, include everything after the domain name. For the target URL, include everything after /s.

```
/source, /target
/case/oldCaseLocation, /case/500RM000003UjsEYAS/my-case-2
```

CSV for Dynamic URL Redirect Rules in LWR Sites

A URL comprises path segments that are separated by a "/". For example, `/path/to/source` has three path segments: path, to, and source. An asterisk (*) denotes a wildcard that can match any text on the source side. If you use a variable in the source URL, you must also use it in the target URL.

A simple example of a dynamic redirect rule is `/path/to/source, /path/to/target`. Let's look at a sample CSV file that includes this rule, where (product) is a variable:

```
/source, /target
```

```
/prod/pid/(productId), /product/(productId)
```

A customer enters the URL `https://www.my.company.salesforce.com/prod/pid/`***`prd-123`***

In this case, the `prod/pid/prd-123` part of the URL matches the `/prod/pid/(product)` source.

So the customer is redirected to the target `https://www.my.company.salesforce.com/product/`***`prd-123`***.

Consider a scenario that uses a wildcard for redirects. If you add the rule:

```
/path/*/category, /categories/category-abc-slug
```

.

And the customer enters `https://www.my.company.salesforce.com/path/id/category`.

Then the source `/path/id/category` part of the URL matches the `/path/*/category` source, and as a result, the customer is redirected to `https://www.my.company.salesforce.com/path/categories/category-abc-slug`.

You can use multiple variables and multiple wildcards, but only one variable and wildcard per path segment.

Administer Your Experience Cloud Site

After creating your Experience Cloud site, take care of administrative tasks such as adding members, securing your data, defining what records are shown in your site and to whom, and enabling other features such as SEO.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Experience Cloud Site Setup Checklist

Building an Experience Cloud site is the result of research, mapping of goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for site.

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

Configure the default login, logout, password management, and self-registration options for your site. Or customize the behavior with Apex and Visualforce or Experience Builder (Site.com Studio) pages. You can also use dynamic URLs to brand your pages at run time.

Manage Site Membership

Learn how to create external members and add them to your site.

Delegate Site Administration to an External User

Delegate the administration of your site to an external user to increase your site's capacity for growth and reduce bottlenecks. External administrators can add, update, and disable members, and they can reset passwords and manage user permissions.

Experience Cloud Site Statuses

Experience Cloud sites can have one of these statuses: preview, inactive, active, and archived.

Manage Site Emails and Notifications

Manage the emails that are sent out from your Experience Cloud site, and which notifications your members see.

Experience Cloud Site Setup Checklist

Building an Experience Cloud site is the result of research, mapping of goals, and defining your audience. At the same time, you must have all your ducks in a row so the actual implementation process is seamless. You know your org best, but use this general checklist to help you organize what you need for site.

Have you considered everything on these lists?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

Before You Begin:

Gather your branding assets:

- [ ] High-resolution image of your company logo
- [ ] Color scheme (or an image to upload to automatically generate one)
- [ ] Image to use as a header

- [ ] Thumbnail images (385x385 pixels), if you're using Featured Topics

In your internal Salesforce org:

- [ ] Enable Digital Experiences. Choose a unique URL that works for your business, because you can't change it after it's been set.
- [ ] Set up email templates for any communication between the community and its members (welcome email, resetting password email, and so on).
- [ ] Enable any Service Cloud features you plan to use in the community, such as Salesforce Knowledge and Embedded Chat.
- [ ] Review profiles and add permission sets as needed.
- [ ] Set up Web-to-Case.

If you're using Salesforce Knowledge:

- [ ] Review your data categories.
- [ ] Enable feed tracking for your Knowledge article types.

As You're Making Your Site:

In your internal Salesforce org:

- [ ] Add members.

Configure the Guest User Profile (access using Experience Builder):

- [ ] Give read and create permissions for the case object.
- [ ] If using Salesforce Knowledge, give guests access to your data categories.

In Experience Workspaces:

- [ ] Set up navigational topics and subtopics, and associate articles to each topic.
- [ ] Set up featured topics and associated images.
- [ ] Download the latest Salesforce Communities Management from the AppExchange.
- [ ] Set up moderation criteria and rules.
- [ ] Enable and set up reputation.

In Experience Builder:

- [ ] Customize your community to match your company's branding.
- [ ] Add standard and custom Lightning components to customize their design and content.

After Making Your Site

- [ ] Set up an internal Chatter group for feedback, and invite people to take a test drive while the site is still in preview mode.
- [ ] Incorporate their feedback, and then publish your site.
- [ ] Seed the site with some initial content: welcome posts, groups, and relevant or fun articles.
- [ ] Archive your site on page 92 if you no longer need it.

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

Configure the default login, logout, password management, and self-registration options for your site. Or customize the behavior with Apex and Visualforce or Experience Builder (Site.com Studio) pages. You can also use dynamic URLs to brand your pages at run time.

By default, each site comes with default login, logout, password management, and self-registration pages. Salesforce also includes associated Apex controllers that drive this functionality under the hood. You can use Experience Builder or Visualforce to create custom branding and change the default behavior.

Warning: When you customize a login page or any page that includes fields with sensitive or confidential information with Experience Builder, we recommend that you use only standard components built by Salesforce or components that you built, customized, or vetted. Use of third-party components and code libraries on a page that includes fields with sensitive or confidential information can increase your risk for security vulnerabilities.

Brand Your Identity Experience

Create a branded identity experience by customizing the design of the pages users see when they log in to your site, verify their identity, reset passwords, and self-register.

Set Up Dynamic URLs with Experience Workspaces

You set up dynamic URLs for your login experience from the Login & Registration page of the Administration workspace. Create dynamic URLs by including a placeholder that resolves at run time. Implement the dynamic URLs for the logo and right-frame content on the pages used to log in, verify identity, reset passwords, and self-register.

Redirect Users to a Custom Logout URL

When your customers log out, they're directed to your site login page by default. To redirect them to a different location, such as your company website or a Visualforce page, specify a custom logout URL.

Customize Your Forgot Password and Reset Password Pages

You can customize your Forgot Password and Reset Password pages from the Administration workspace. You can also create custom password management pages in Visualforce.

Configure Your Self-Registration Page

After you decide which page type is best for your company, set up self-registration from the Login & Registration page in Experience Workspaces.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Brand Your Identity Experience

Create a branded identity experience by customizing the design of the pages users see when they log in to your site, verify their identity, reset passwords, and self-register.

After you implement your sites' identity processes, bring it all together with your own branded design. For example, you can change the colors of your background and login buttons, insert your own logos, and customize the layout of your pages. You can also change the branding of your pages based on who the user is and where they're logging in from. Depending on your site's needs, you can choose which settings apply to which pages, or create custom branding for each type of page.

For example, you're in charge of the Experience Cloud site for your coffee business. You want to create a branded experience by customizing the pages users see when they log in, verify their identity, reset passwords, and self-register. So you configure your pages to display your company's logo and set up a background image that shows the cozy atmosphere of your coffee shop. Now whenever existing users log in to your site, verify their identity, or reset passwords, they're presented with your logo and custom background image. And new users see your branded design when they self-register. Your branded identity experience makes the look and feel of your site memorable to your customers and keeps them coming back for more.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Professional**, **Enterprise**, **Unlimited**, and **Developer** Editions

Brand Your Pages from the Administration Workspace

Salesforce Customer Identity gives you a point-and-click way to brand the pages that prompt users to log in to your site, verify their identity, reset passwords, and self-register. If you've set up login flows, they also use these branding settings.

Brand Your Experience Builder Pages

Each Experience Cloud template comes with its own set of pages for login, identity verification, password resets, and self-registration. You can use Experience Builder to customize your login experience to match your brand.Experience Builder pages are available after you publish your site.

Create a Custom Login Discovery Page

To set up passwordless login with an email address or phone number, create a custom Login Discovery page. With this configuration, your users can self-register and log in with an email address or phone number. Set up your page in Experience Workspaces, and customize your login process with Apex.

Customize the Apex Login Controller

Salesforce provides an easy way to customize your login process using the Login Discovery Page, which lets you implement passwordless login. However, if you want even more control over your login process, you can modify the Apex login controllers and use customized Visualforce pages.

Brand Your Pages from the Administration Workspace

Salesforce Customer Identity gives you a point-and-click way to brand the pages that prompt users to log in to your site, verify their identity, reset passwords, and self-register. If you've set up login flows, they also use these branding settings.

For convenience, you can use the sample logos and backgrounds we provide by downloading this file: `https://www.salesforceidentity.info/ExternalIdentityAssets.zip`. Or use your own.

Note: You can brand Aura site pages from the Login & Registration page. If you used the Login & Registration page to brand pages for an LWR site before Summer '23, those configurations still apply and can be edited from the Login & Registration page. For LWR sites that weren't branded from the Login & Registration page before Summer '23, see Brand Your Experience Builder Pages.

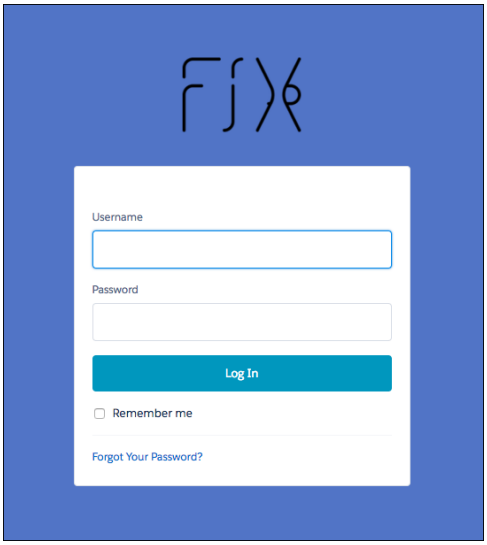
The branding options you set here apply to all types of pages for logging in, verifying identity, resetting passwords, and self-registration, except Experience Builder pages.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.
2. Next to your site name, click **Workspaces**.
3. Select **Administration**, and then select **Login & Registration**.
4. To upload a logo from a file, take these steps.
   a. For Logo Type, from the dropdown, select **File**.
   b. For Logo File, click **Choose File**, then browse your local drive to upload a file

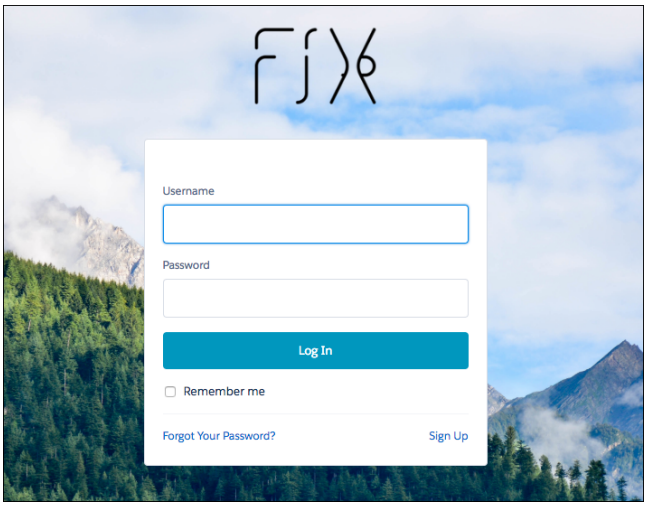
   Instead of uploading a file, you can enter a URL where you store your branding assets. This URL can use a dynamic value to determine which logo appears at run time. The URL contains the expid placeholder `{expid}`, for example, `https://www.my-cms.com/{expid}/logo.png`. When customers click a link to log in, how the login page looks depends on the expid value indicated in the login URL.
5. For Background Type, select an option to customize the background. Background Type, select **Color**, and select your color.
   a. To use a solid color, from the dropdown, select **Color**, then select a color or enter a hexadecimal value.
   b. To use an image or color gradient, from the dropdown, select **Image URL**, and then enter a URL to an image.

   The Image URL can also use a dynamic value to determine which background image appears at run time.
6. For Login Button, select a color or enter a hexadecimal value. The color applies to these buttons.
   - The **Log In** button on the login page
   - The **Verify** button on the identity verification page
   - The **Continue** button on the reset password page
   - The **Sign Up** button on the self-registration page
7. (Optional) For Right Frame URL, enter a URL to display content in an iframe to the right of the login form on the login page. For example, use the right frame URL to display a branded image or topical announcements.
8. For Footer Text, enter any text, such as a copyright, to display at the bottom of your pages.
9. Save your settings.
10. To view your changes, open your site URL.
    a. From Administration, select **Settings**, and copy the URL for your site.
    b. From your browser, open a new private (incognito) window, and paste the URL in the address bar.

    Here's an example of how the login page looks with branding options set on the Login & Registration page. The logo is displayed above the login form and the background and Log In button each use custom colors.



Here's an example of the same login page using a background image instead of a solid color.



Brand Your Experience Builder Pages

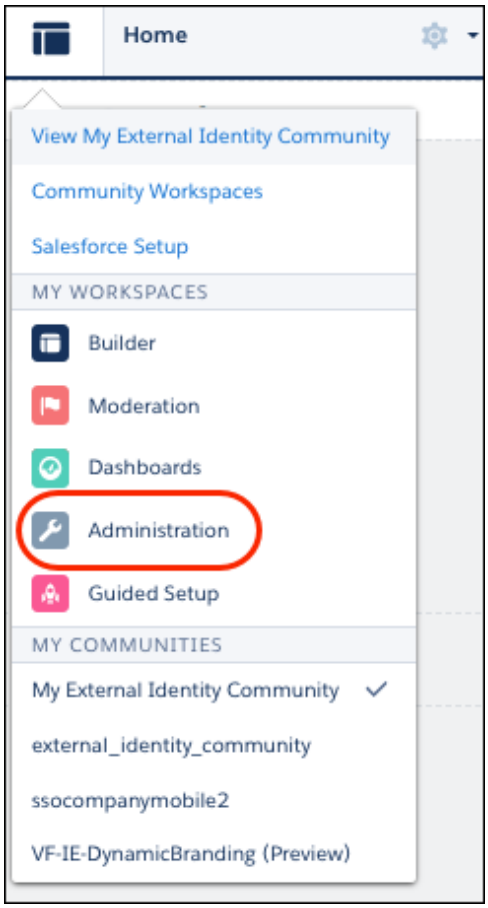
Each Experience Cloud template comes with its own set of pages for login, identity verification, password resets, and self-registration. You can use Experience Builder to customize your login experience to match your brand.Experience Builder pages are available after you publish your site.

When you brand your site from Experience Builder, the branding settings on the Login & Registration Page of the Administration workspace are ignored.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.
2. Next to your site, click **Builder**.
3. To get the Experience Builder pages that come with your Experience Cloud site template, publish your site. In the top right, click **Publish**.

   If you see a notification to activate experiences, ignore it. You activate the site later on.

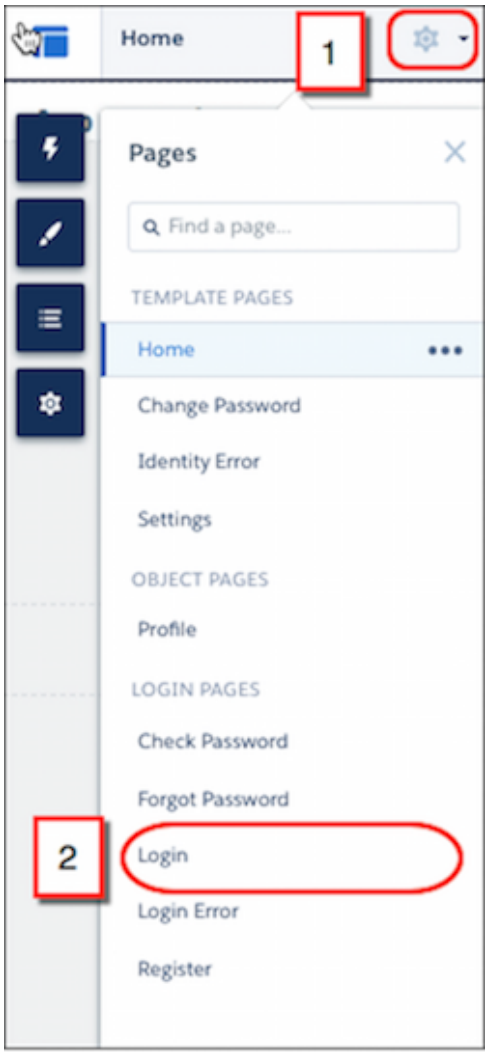
4. Return to the Administration workspace. In the top left, click , and then select **Administration**.



5. Select **Login & Registration**.
6. For each page type, such as login, identity verification, password resets, and self-registration, find the Experience Builder page that comes with your template.

   For example, to select an Experience Builder page for login, for Login Page Type, select **Experience Builder**, and then select **login** from the page picker.
7. Save your changes.
8. Return to Experience Builder. At the top of Workspaces, select **Administration**, then select .
9. At the top of Builder, click the dropdown next to Setup, and then select your page type.

   For example, to select the login page, click the dropdown (1) and then select **Login** (2).



Your login page now appears in Experience Builder.

10. From here, you can further brand your page with Experience Builder. For more information, see Manage Your Site's Pages and Their Properties with Experience Builder.

For more information on the page types you can brand to customize your authentication experience, see these resources.

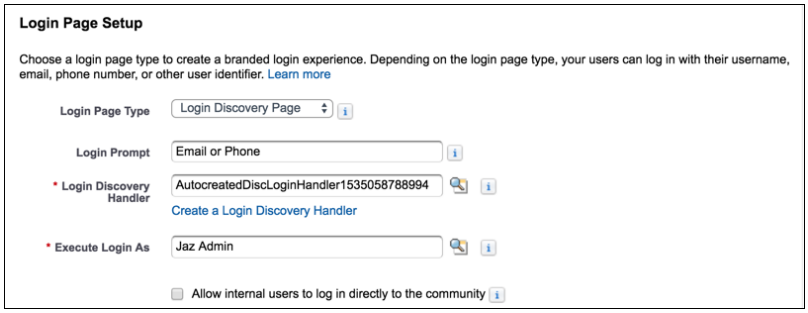
- Customize Login, Logout, and Password Management Pages
- Self-Registration
- Passwordless Login

Create a Custom Login Discovery Page

To set up passwordless login with an email address or phone number, create a custom Login Discovery page. With this configuration, your users can self-register and log in with an email address or phone number. Set up your page in Experience Workspaces, and customize your login process with Apex.

When you create your Login Discovery page in Experience Workspaces, Salesforce generates a LoginDiscovery handler. You can customize the LoginDiscovery handler later.

1. From Setup, in the Quick Find box, enter `All Sites`, and select **All Sites**.
2. Next to your site name, click **Workspaces**.
3. In the Workspaces page, select **Administration**, and then select **Login & Registration**.
4. Under Login Page Setup, for Login Page Type, select **Login Discovery Page**.



5. (Optional) For Login Prompt, enter the text that you want to appear as the prompt on your login page.

   For example, enter `Email Address or Phone Number`. You can localize the login prompt with a custom label. Use the `$Label` global variable, for example, `$Label.loginPrompt`.

6. For Login Discovery Handler, leave the field blank and click **Create a Login Discovery Handler**. Salesforce auto-generates the Apex handler on save. You modify the code later.
7. For Execute Login As, select a Salesforce admin with the Manage Users permission to run the handler.

   Execute Login As provides the context in which the Login Discovery handler runs. By assigning a user to the handler, operations performed by the handler are easily traced back to the login process. In production, you typically create a system user for the Execute Login As user.

8. If **Allow employees to log in directly to the site** is selected, deselect it.

   The Login Discovery Page doesn't support org employees logging in to the site directly. However, you can customize the handler to redirect users to an IdP. For employees, you can set up Login Discovery with My Domain. From your My Domain Authentication Configuration settings, set the login page type to Discovery.

9. Save your settings.

   Salesforce generates a default login discovery handler and populates the Login Discovery Handler field with its name. This handler accepts an email address or phone number from the login page and emails or texts a verification code to the user. If the user's email or phone number isn't verified, the user is prompted for a password.

Customize the Apex Login Controller

Salesforce provides an easy way to customize your login process using the Login Discovery Page, which lets you implement passwordless login. However, if you want even more control over your login process, you can modify the Apex login controllers and use customized Visualforce pages.

You can use these steps to customize the login process for Default, Experience Builder, and Visualforce Pages. If you're using the Login Discovery Page to implement passwordless login programmatically, see Email or Phone Number Registration with Passwordless Login.

For more information on Login Pages, see Login Page Types.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create and edit Visualforce pages:
- Customize Application

To edit Apex classes:
- Author Apex

  AND

  Customize Application

1. From Setup, in the Quick Find box, enter *Apex Classes*, and then select **Apex Classes**.
2. Next to `CommunitiesLoginController`, click **Edit**.
3. Add the following code.

```
global PageReference forwardToCustomAuthPage() {
       String startUrl = System.currentPageReference().getParameters().get('startURL');

        return new PageReference(Site.getPathPrefix() + '/SiteLogin?startURL=' +
EncodingUtil.urlEncode(startURL, 'UTF-8'));
    }
```

4. If you created a custom login page, replace `SiteLogin` with the name of your Visualforce page.
5. Click **Save**.
6. Click **Edit** next to `CommunitiesLandingController`.
7. Add this code.

```
public PageReference forwardToCustomAuthPage() {
       String startUrl = System.currentPageReference().getParameters().get('startURL');

        return new PageReference(Site.getPathPrefix() + '/SiteLogin?startURL=' +
EncodingUtil.urlEncode(startURL, 'UTF-8'));
    }
```

8. If you created a custom login page, replace `SiteLogin` with the name of your Visualforce page.
9. Click **Save**.
10. From Setup, enter *Visualforce Pages* in the Quick Find box, then select **Visualforce Pages**.
11. Click **Edit** next to `CommunitiesLogin`.
12. In the first line of code, add the following:

```
action="{!forwardToCustomAuthPage}"
```

13. Click **Save**.
14. Click **Edit** next to `CommunitiesLanding`.
15. In the first line of code, add the following:

```
action="{!forwardToCustomAuthPage}"
```

16. Click **Save**.

Set Up Dynamic URLs with Experience Workspaces

You set up dynamic URLs for your login experience from the Login & Registration page of the Administration workspace. Create dynamic URLs by including a placeholder that resolves at run time. Implement the dynamic URLs for the logo and right-frame content on the pages used to log in, verify identity, reset passwords, and self-register.

Set up dynamic branding from the Experience Workspaces Login & Registration page. You can add custom login pages to your site regardless of the template that you used to create the community.

The dynamic URL contains the *`expid`* placeholder for your logo and right-frame content. For example, the dynamic URL `https://www.my-cms.com/{expid}/logo.png` controls the logo displayed on your pages. The dynamic URL `https://www.my-cms.com/{expid}/index.php` controls the right-frame content displayed on your pages. The right-frame URL displays the contents of the URL in an iframe. At run time, for the logo and right-frame content, the external site replaces the dynamic URL with the brand specified by the expid value (for example, coffee) in the query parameter.

The brand that appears at run time depends on the expid dynamic URL that you specify on the Login & Registration page. For example, given the dynamic URL, `https://www.my-cms.com/{expid}/logo.png`, the Fix Coffee logo appears when the login URL is `https://fix.my.site.com/?expid=coffee`.

You deliver different brands, or user experiences, based on how the expid query parameter gets set in your implementation. You can set it in a URL that you send to your site users in an email. Or you can set the URL on a login button. You can also set the query parameter programmatically with the `setExperienceId` method of the `System.Site` class.

In addition to using dynamic branding for the login process, you can use it to brand the user's experience during the entire user session. To do so, instruct the site to store the expid value in the user's browser. When stored, you can retrieve it as long as the user's logged in to the site.

When specifying your logo and right-frame URLs, keep in mind these considerations.

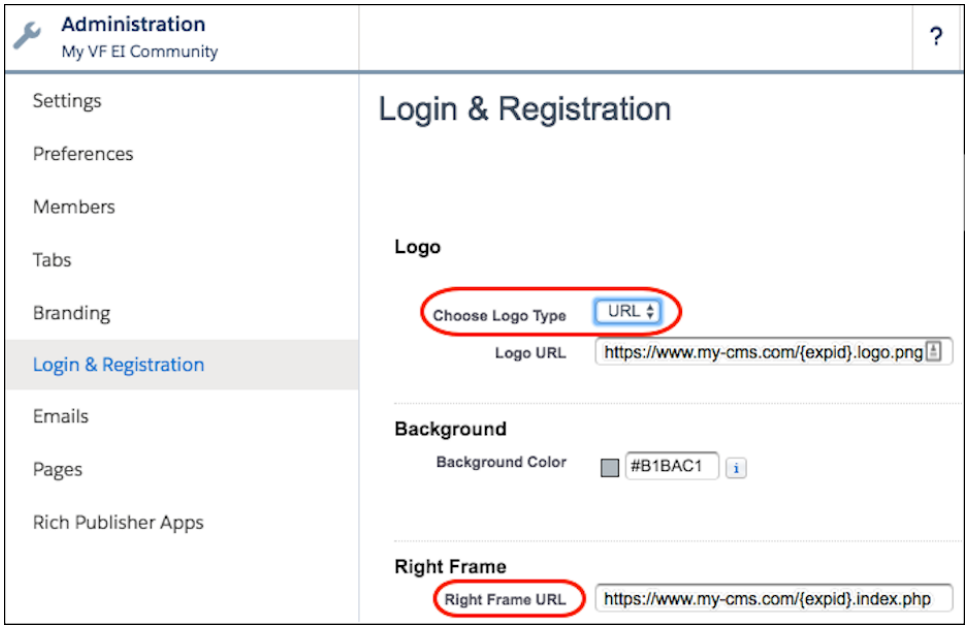
- Most browsers don't allow mixing the `http://` and `https:// protocols` on the same page.
- The URL for your right-frame content must use the same protocol as your site. Your resource and test or demo servers must also use the same protocol.

Generally, we recommend using `https://` for your logo and right-frame URLs. However, in local and test environments, `http://` can be more flexible.

To set up dynamic URLs for your logo and right-frame content, take these steps.

1. From Setup, in the Quick Find box, enter *`All Sites`*, and select **All Sites**.
2. To access Experience Workspaces, next to your site name, click **Workspaces**
3. Select **Administration**, and then select **Login & Registration**.
4. To set up dynamic branding for your logo, take these steps.
   a. For Logo Type, select **URL**.
   b. For the Logo URL field, enter a dynamic URL. For example, `https://www.my-cms.com/{expid}/logo.png`.

5. To set up dynamic branding for your right-frame content, for Right Frame URL, enter a dynamic URL. For example, `https://www.my-cms.com/{expid}/index.php`.



Redirect Users to a Custom Logout URL

When your customers log out, they're directed to your site login page by default. To redirect them to a different location, such as your company website or a Visualforce page, specify a custom logout URL.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.
2. Next to your site name, click **Workspaces**.
3. Select **Administration**, and then select **Login & Registration**.
4. Under Logout Page URL, enter a complete URL to a webpage or a Visualforce page.

SEE ALSO:

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Customize Your Forgot Password and Reset Password Pages

You can customize your Forgot Password and Reset Password pages from the Administration workspace. You can also create custom password management pages in Visualforce.

Note: You can select a Visualforce page as your custom Forgot Password or Reset Password page for Aura sites only. If you used a Visualforce page as your custom Forgot Password or Reset Password page for an LWR site before Summer '23, the site still uses the Visualforce page. However, if you change the LWR site's Forgot Password or Reset Password page to another page type, you can't go back to using the Visualforce page.

To use a custom Experience Builder Forgot Password page, first publish your login page in Experience Builder.

For your Forgot Password Page, you can select from these page types.

- Default Page—A simple page with basic styling that serves as a starting point for your customizations.
- Experience Builder Page—Use the Experience Builder design tool to quickly create a page that matches your company's theme. To access the Experience Builder Page, you must first publish your site.
- Visualforce Page—Use a custom Visualforce page.

For your Reset Password Page, you can use a Default Page or a custom Visualforce Page. Experience Builder Pages aren't supported.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**
2. Next to your site name, click **Workspaces**.
3. Select **Administration**, and then select **Login & Registration**.
4. Under Password Pages, for Forgot Password, select a page type.
   - To use the Default Page, select **Default Page**.
   - To use the Experience Builder Page, select **Experience Builder Page**, then click and select **Forgot Password**.
   - To use a custom Visualforce Page, select **Visualforce Page**, then click and select a Visualforce page.
5. For Reset Password, select a page type.
   - To use the Default Page, select **Default Page**
   - To use a custom Visualforce Page, select **Visualforce Page**, then click and select a Visualforce page.
6. Save your settings.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

7. To view your changes, open your site URL in a private (incognito) browser and click the Forgot Password link, then follow the prompts to reset your password.

SEE ALSO:

Customize Code for Lightning Components on Login Pages

Set Up Dynamic URLs with Experience Workspaces

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

Configure Your Self-Registration Page

After you decide which page type is best for your company, set up self-registration from the Login & Registration page in Experience Workspaces.

Note: If you want even more control over self-registration, and you're familiar with Apex, you can customize your self-registration page and process by modifying the Apex controller. The customizations you make to this controller override the Login & Registration page settings. For steps, visit Customize the Self-Registration Apex Controller.

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**.
2. To access Experience Workspaces, next to your site name, click **Workspaces**.
3. From Experience Workspaces, select **Administration**, and then select **Login & Registration**.
4. Under Registration Page Configuration, select **Allow customers and partners to self-register**. If users attempt to register with a duplicate username, they receive an error message that their request can't be completed, but administrators aren't notified.
5. Select the self-registration page type.
   a. To use the Default Page, select **Default Page**. You can customize the default page with Visualforce. For steps, see Modify the Default Self-Registration Page.
   b. To use the Experience Builder Page, select **Experience Builder Page**, click , and then select **Register**. For more information on using Experience Builder to customize your page, see Manage Your Site's Pages and Their Properties in Experience Builder .
   c. To use the Visualforce Page, select **Visualforce Page**, click , and then select a custom Visualforce page.
   d. To use the Configurable Self-Reg Page, select **Configurable Self-Reg Page**. Then visit Use the Configurable Self-Reg Page for Easy Sign-Up for detailed configuration steps.
   e. To use the Experience Builder Page, select **Experience Builder Page**, click , and then select **Register**. For more information on using Experience Builder to customize your page, see Manage Your Site's Pages and Their Properties in Experience Builder

   Tip: If you're trying out various page types, select the Default Page and save to clear your selections before choosing another page type.
6. For more control over your self-registration process, we sometimes recommend disabling the standard Aura and Lightning Web Runtime (LWR) self-registration components. Select **Disable the standard components for self-registration on Aura and LWR sites** if your use case fits one or more of these scenarios.
   - You selected the Default, Visualforce, or Configurable Self-Reg page types.
   - You selected the Experience Builder page type and you want full control over the user information that your self-registration Apex controller can collect. After you disable the standard component, create a custom component for your use case.
   - You selected the Experience Builder page type and you don't want to use the standard self-registration component that comes with your site type.

If you want to use the Experience Builder standard component that comes with your site type, leave this setting deselected to avoid breaking your flow.

7. For Profile, select the profile you want to assign to new users.
   a. Assign a cloned version of a standard site profile as the default for self-registration. For example, assign a cloned version of the External Identity User profile. Avoid using a standard site profile as the default.
   b. Use a restrictive profile as the default. If needed, open up access using permission sets or sharing rules.
8. For Account, follow the corresponding step based on your use case.
   a. To save new users as contacts of a business account, click , and then select the account you want to use.
   b. To save new users under individual person accounts, leave the Account field blank.
9. Save your settings.
10. Test your self-registration process.

SEE ALSO:

Customize Code for Lightning Components on Login Pages
Set Up Dynamic URLs with Experience Workspaces
Customize the Self-Registration Apex Controller
Configure Person Accounts for Self-Registration
Use Apex to Configure Self-Registration in Batches for High-Volume Sites
Use the Configurable Self-Reg Page for Easy Sign-Up
Create a Custom Identity Verification Page
Best Practices and Considerations When Configuring Self-Registration

Manage Site Membership

Learn how to create external members and add them to your site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Create Experience Cloud Site Users
Create site users to access Experience Cloud sites.

Add Members to Your Experience Cloud Site
Use profiles and permission sets to manage site membership during the setup process. Adding a profile or permission to a site's membership gives access to the site to users with that profile or assigned the permission set.

Use Custom Visualforce Error Pages for Authenticated Users
If you have customized Visualforce error pages, you can have those pages display for authenticated Experience Cloud site users.

Create Experience Cloud Site Users

USER PERMISSIONS	
To create or edit Customer Community Plus or Partner Community users:	Manage External Users Note: Avoid using the Manage User permission for the sole purpose of logging in to a site as a user because it also grants administrator access to make organizational changes.
To create or edit only Customer Community Plus users:	Manage Customer Users Important: When creating customer users, the account that the new contact is associated with must have an account owner that is assigned a role.
To create, edit, and delete profiles:	Manage Profiles and Permission Sets
To log in as a partner or customer user:	Manage External Users OR Manage Customer Users Important: The Manage Customer Users permission is on by default for standard users created before Summer '18. AND Edit on Accounts Note: This permission isn't needed if the person logging in has a higher role than the partner or customer user they're logging in as.

EDITIONS
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
Applies to: LWR, Aura, and Visualforce sites

Create site users to access Experience Cloud sites.

1. If you're creating a partner user, ensure that the account has been enabled as a Partner Account.
   a. In Lightning Experience, click the action dropdown, and then from the account detail page, select **Enable as Partner**.
   b. In Salesforce Classic, on the account detail page, click **Manage External Account** > **Enable as Partner**.
2. On the account's contact related list, view or add the contact record for the person that you want to add to a site. When you create a partner or customer user, Salesforce creates a user record in your org with some details pre-populated from the contact record.
   a. In Lightning Experience, on the contact detail page, click the actions dropdown, and then select **Enable Partner User** or **Enable Customer User**.
   b. In Salesforce Classic, click **Manage External User** and either **Enable Partner User** or **Enable Customer User**.

3. Edit the user record, and assign the appropriate user license: Partner Community for partners and Customer Community or Customer Community Plus for customer users.
4. Select the appropriate profile and role for the partner or customer user.
5. If you haven't activated the site to add the external user to, deselect **Generate new password and notify user immediately** so that users don't receive a password before activation.
   - If you opt to notify the user immediately but the user isn't a member of any active site, Salesforce doesn't send the email.
   - You can send a welcome email with the login information by selecting the **Send welcome email** option when you activate a site.
   - If you don't send a welcome email when you activate the site, you must manually send this information to the user.
6. Save your work.

Take a look at how you can create external users.

Watch a video

Considerations for Creating Experience Cloud Site Users

All users who log into an Experience Cloud site must have a record in Salesforce. Their record is created either as a person account or as a contact connected to a customer or partner business account. External users are enabled from the contact record as a customer or partner user, depending on your business relationship.

SEE ALSO:

Delegate Site Administration to an External User

Experience Cloud User Licenses

Add Members to Your Experience Cloud Site

How do external Experience Cloud site members get login information?

Reset an External User's Password for Experience Cloud Sites

Experience Cloud User Licenses

Upgrade Experience Cloud User Licenses

Partner User Roles

Customize Email Sent from Experience Cloud Sites for Email Verification

Considerations for Creating Experience Cloud Site Users

All users who log into an Experience Cloud site must have a record in Salesforce. Their record is created either as a person account or as a contact connected to a customer or partner business account. External users are enabled from the contact record as a customer or partner user, depending on your business relationship.

- All Experience Cloud site users who log in to a site must have an assigned Experience Cloud user license. View your available user licenses in **Setup** > **Company Settings** > **Company Information**.
- When creating any external user, the account that the new contact is associated with must have an account owner that is assigned a role in Salesforce.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

- The **Log in to Experience as User** action is available from the actions list on the contact record in Lightning Experience. In Salesforce Classic, click **Manage External User** to access the **Log in to Experience as User** button.
- You can only configure the **Log in to Experience as User** action on the contact layout in Lightning Experience. After you enable a partner or customer user in Salesforce Classic, **Log in to Experience as User** is available on the contact record, even if it's been removed from the contact layout.
- To troubleshoot issues or ensure that the site is configured appropriately, on the contact detail page, select **Log in to Experience as User**. Unless you have a higher role than the partner or customer user that you're logging in as, you must have Edit permission on Accounts to log in as a partner or customer user. A new browser window opens, and you're logged in to the community on behalf of the external user.
- When you log in as an external user, you see the behavior that the external user sees. For instance, external users see only the site dropdown menu if they have access to more than one active site. If external users have access to only one active site and they view another site in preview, the users don't see the dropdown menu in the preview site.
- When logged in as another user, an admin or support user can't authorize OAuth data access for the user. For example, if an admin logs in as another user, the admin can't authorize OAuth access for third-party applications to user accounts. This restriction includes single sign-on.
  - When multi-factor authentication (MFA) is enabled for a site, admins can't use the login to access the site. See Implement Multi-Factor Authentication.
- Users and administrators can only log in to sites that they're members of. To allow a user to log in using Experience Cloud sites, make internal and external users members of the site. If they aren't a member, and attempt to log in, they see a site membership error.
- Create a user profile to assign to your external users. By default, Salesforce prevents you from creatingExperience Site users with standard profiles. Assign user licenses using profiles.
- Customer or partner users can't directly log in to Salesforce. They must use an Experience Cloud site to access your Salesforce data. To add a customer or partner user,add their user profiles as a member of an Experience Cloud site.
- Customer Users don't see the Notes & Attachments related list on accounts or contacts. Site users can't own accounts enabled for sites.
- As it is with internal users, external users can't be deleted. If you no longer want an external user to have access to a site, deactivate the user.
- When you search in your Salesforce org for site user records, sometimes finding them can be difficult. The reason is when you create a site user through **Create External User** from a contact record, the new user record is assigned to a site's unique network ID. Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Because the user record is associated with a site network ID, global search doesn't return results for that record. The workaround is to create user records in the internal org, and then associate the records to a site. You can associate an internal User record to a community by linking the internal record to a contact record. After you create the link, you can find the user record through global search. The user record's network ID is now associated with the internal org.
- Users with the Delegated External User Administrator profile and Manage External Users or Manage Customer User permissions can't select profiles for new users unless the profiles are added to the Assignable Profiles list. These profiles are added when setting up the delegated external administrator. For more information, see Delegate Site Administration to an External User.

Check out this quick video about how Experience Cloud sites live in an org, the differences between Experience Cloud licenses, and how Salesforce accounts and site users are associated with one another.

Watch a video

Add Members to Your Experience Cloud Site

Use profiles and permission sets to manage site membership during the setup process. Adding a profile or permission to a site's membership gives access to the site to users with that profile or assigned the permission set.

Add a profile or permission set to a site's membership. Using profiles and permission sets, you can:

- Grant or remove access for groups of users. After you add a profile or permission set, all users assigned to that profile or permission set become members of the site.
- Enforce a membership policy. New users added to a profile or permission set that is already associated with a site automatically gain access.

Note:

- If you add a permission to a permission set that is being used to grant membership to a site, the site members also get access to the permissions unrelated to site membership. Salesforce recommends checking if a permission set is used in any site's membership list before adding new permissions to it.
- You can't use permission set groups to add membership to a site, only permission sets.

Permission sets allow added flexibility for adding members. You can grant site access to a subset of users from the same profile, without needing to clone the profile.

You can add Standard, Chatter, and partner profiles to sites. Chatter customers, from private groups with customers, can't be added to sites even if they're assigned permission sets that are associated with sites.

Note: Profiles and permission sets associated with sites can't be deleted from Salesforce. Remove the profiles or permission sets from the sites first.

1. Open Experience Workspaces.
2. Click **Administration** > **Members**.
3. To add members using profiles:
   a. To filter profiles, select a profile type from the dropdown menu. To search for a specific profile, enter a search term and click **Find**.

      Search returns profiles for the selected filter.

      Note: Search results include profiles that are already part of the site.

   b. Select the user profiles you want to allow access to your site. To select multiple profiles, press CTRL.
   c. Click **Add**. To remove a profile, select it and click **Remove**.

      If you remove a profile from a site, users with that profile lose access to the site, unless the users are assigned permission sets or other profiles that are still part of the site. Their posts and comments still appear.
4. To add members using permission sets:
   a. To search for a specific permission set, enter a search term and click **Find**.
   b. Select the permission sets you want to allow access to your site. To select multiple permission sets, press CTRL.
   c. Click **Add**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

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

5. Click **Save**.

   If the site is `Active` and welcome emails are enabled, users with the profiles or permission sets you added receive a welcome email. If the welcome email is sent is sent to an external user who hasn't logged in to a site yet, it includes a username and a change password link.

When the site is `Active`, welcome emails are sent and the site is discoverable by members. When a site is in `Preview` status, only members with the login URL can view the site. If a site is `Inactive`, only users with the "Create and Set Up Sites" permission can access it through the All Sites menu, regardless of membership.

There are other options for granting access to your site:

- Enable self-registration so that external users can register on their own
- Enable authentication providers, such as Facebook, so that external users can log into the site without creating an account

For more information about these additional options, see Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site.

With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

Set Custom Site Roles

Experience Cloud site members are typically assigned the role of partner, customer, or employee. However, you can create custom roles for users that replace standard ones. You can also choose to display the member's company name in place of a role.

Reset an External User's Password for Experience Cloud Sites

An external user's password can be reset either by the user or by the administrator of the org hosting the site.

How do external Experience Cloud site members get login information?

External users get their login credentials in welcome emails from an Experience Cloud site.

How do I update Experience Cloud site membership using the API?

If you aren't a member of an Experience Cloud site, you can't access Experience Workspaces to update administration settings, including membership. As an alternative, you can use the API and Data Loader to add yourself and others to a site.

Assign a Default Experience to a User Profile

Assign a default experience to a user profile to associate that profile with a specific community, portal, or site. Any links in the notification lead back to the default experience—no more news from nowhere.

Membership Processing Best Practices

Processing membership when many members are added in a single transaction can result in significant lockout times. Limiting the number of users per transaction can speed up processing time. Follow these best practices to minimize the impact of processing times on members.

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites

Enable the Global Header for Salesforce Tabs + Visualforce Sites

Set Custom Site Roles

Experience Cloud site members are typically assigned the role of partner, customer, or employee. However, you can create custom roles for users that replace standard ones. You can also choose to display the member's company name in place of a role.

Note: Custom site roles can only be assigned to authenticated users. This feature is not available for unauthenticated or guest users.

To create custom roles Experience Cloud sites:

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**. Click **Workspaces** for the site you'd like to access.
2. Under **Administration**, click **Members**.
3. Under **Site Role**, select **Custom**.
4. Enter the new name you want to use instead of the role name. You can replace any or all of the names. You can even remove a role by deleting the role name.
5. Click **Save**.

Reset an External User's Password for Experience Cloud Sites

An external user's password can be reset either by the user or by the administrator of the org hosting the site.

In either case, when someone initiates a reset of an external user's password, an email is sent to the user with a link to reset the password. Password reset links expire immediately after users click them, or after 24 hours if unused. When users click the link, they're required to reset their password before proceeding.

If a user-initiated password reset request can't be processed, users receive an email telling them why. Password reset requests fail if a user's account is temporarily or permanently locked due to too many unsuccessful login attempts or if the request was sent outside approved login hours, IP ranges, or network locations.

SEE ALSO:

Create Experience Cloud Site Users

How do external Experience Cloud site members get login information?

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

How do external Experience Cloud site members get login information?

External users get their login credentials in welcome emails from an Experience Cloud site.

When you enable a contact as a customer user or partner user, they don't receive their login credentials until you add them to an Experience Cloud site with welcome emails enabled. If welcome emails are disabled for the site, the external user doesn't receive credentials, and you must manually send them. To do so, from Setup, enter `Users` in the Quick Find box, select **Users**, select the checkbox next to the user's name, and then click **Reset Password**. An email containing the user's username and a link to reset the password is sent to the user. The link in this email expires after 24 hours.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

Create Experience Cloud Site Users

Reset an External User's Password for Experience Cloud Sites

How do I update Experience Cloud site membership using the API?

If you aren't a member of an Experience Cloud site, you can't access Experience Workspaces to update administration settings, including membership. As an alternative, you can use the API and Data Loader to add yourself and others to a site.

Tip: You can also use other data loaders to update your Experience cloud site membership.

1. Get the `networkId` for your Experience Cloud site.

   From Setup, enter `Digital Experiences` in the `Quick Find` box, select **All Sites**, and then right-click your Experience Cloud site URL and select **Inspect**. The `data-networkId` property provides your `networkId`.

2. Get the `profileId` or `permissionsetId` you want to add.

   From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles** or **Permission Sets**. Click on the profile or permission set that you want to add. The ID is the last part of the URL.

   For example, at `ExperienceCloudSitesSubdomainName.my.site.com/00aa11bb22`, the ID is `00aa11bb22`.

3. Create a .csv file with columns for `networkId` and `parentId`. For `parentId`, list the `profileId` or `permissionsetId` you want to add.
4. Open Data Loader and select the **Network Member Group** object. Specify the location of the .csv file you created and complete the Data Loader steps.

After you successfully add members using Data Loader, the members can access Experience Workspaces from the **Workspaces** link on the **All Sites** page in Setup.

Note: In order to access Experience Workspaces, the member must also have Create and Set Up Experiences or Manage Experiences permission.

SEE ALSO:

Insert, Update, or Delete Data Using Data Loader

Assign a Default Experience to a User Profile

Assign a default experience to a user profile to associate that profile with a specific community, portal, or site. Any links in the notification lead back to the default experience—no more news from nowhere.

Assign a **Default Experience** value in Setup through Profiles.

1. In Setup, enter `Profiles` in the `Quick Find` box, then click **Profiles** in your results.
2. Click the name of the profile you want to change.
3. In the Default Experience section, click **Edit**.
4. Select an experience from the **Experience** list.
5. Click **Save**.
   All members who are assigned the user role are associated with the selected default experience. When they receive email notifications about network-agnostic objects, like accounts, cases, and opportunities, links in the notification emails lead back to the default experience. When they receive their new-user email or notifications about password resets, links in those messages also lead back to their default experience.

EDITIONS

Available in: Lightning communities, portals, and sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign a default experience to a user profile:

- Chatter Enabled

  AND

  Create and Set Up Experiences

Membership Processing Best Practices

Processing membership when many members are added in a single transaction can result in significant lockout times. Limiting the number of users per transaction can speed up processing time. Follow these best practices to minimize the impact of processing times on members.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Plan Ahead of the Go Live Date

A few things to keep in mind when planning to add or remove members to a site or portal:

- The number of members that are added or removed affects the processing time. The more members that are processed, the more time it takes to complete the process. When processing over a million users, the processing time can take hours.

  Note: Governor limits ensure that only 10 million users are processed at a time. Attempting to process more than 10 million at a time results in an error.

- When processing members, the site or portal is locked and admins can't make more changes to it. New Experience Cloud site members aren't able to access the site until processing is complete, but existing members still have access. Plan for a maintenance window and communicate as necessary with your members.
- To get an approximate estimate of the processing time, test the deployment in a sandbox environment with a similar setup before deploying in production.
- Schedule membership updates for a time when traffic in the site is known to be low.

Organize Members into Smaller Groups

Organizing members into smaller groups cuts down on processing time. The following strategies can help reduce the number of members being processed at a time:

- Membership processing adds both active and inactive members of a profile or permission set to the portal or site. Remove inactive members from profiles and permission sets if you don't need to track them.
- Go live with high-priority members first. Then add the rest of the group in order of priority.

- Add profiles and permission sets in small batches. For example, if you're adding 10 million members, put them into buckets of 1 million per profile or permission set.
- Removing profiles or permission sets from the portal or site takes longer than adding them. Make sure that those profiles or permission sets are required before you add them so you don't have to remove them later.

Other Considerations

When processing members:

- Don't add and remove profiles or permission sets at the same time.
- Don't add or remove users from profiles or permission sets while membership is processing.
- Don't allow user self-registration while membership is processing.

Contact Salesforce Customer Support for further assistance.

Use Custom Visualforce Error Pages for Authenticated Users

If you have customized Visualforce error pages, you can have those pages display for authenticated Experience Cloud site users.

To assign or customize your Visualforce error pages, in Experience Workspaces, click **Administration** > **Pages** and click **Go to Force.com**. The **Error Pages** section lists your current page selections.

When **Use custom Visualforce error pages** is selected, users who are logged in to the Experience Cloud site see your custom Visualforce error pages. When **Use custom Visualforce error pages** isn't selected, users logged in to the site see the default Visualforce error pages. Guest users who aren't logged in to the site always see the custom Visualforce error pages, regardless of whether you select the checkbox.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Select **Use custom Visualforce error pages**, then click **Save**.

SEE ALSO:

Assign Salesforce Site Error Pages

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Delegate Site Administration to an External User

Delegate the administration of your site to an external user to increase your site's capacity for growth and reduce bottlenecks. External administrators can add, update, and disable members, and they can reset passwords and manage user permissions.

Keep these considerations in mind when delegating an external user as a site administrator.

- You can grant delegated external user administration to users with Partner Community, Customer Community Plus, Gold Partner, Enterprise Administration, or Customer Portal Manager licenses.

  Note: These permissions are automatically enabled when a user is granted the "Delegated External User Administration" permission. They aren't automatically disabled if the "Delegated External User Administration" permission is disabled.

  - The "Portal Super User" permission for users with profiles using Customer Community Plus licenses
  - The "View Roles and Role Hierarchy" permission for all users

- Custom fields aren't visible to a delegated external user administrator when they view user detail records in Salesforce Classic or Lightning Experience.
- To access the account that they're managing, users with the "Delegated External User Administrator" permission require Read access or greater.
- Delegated admins with Customer Community Plus licenses can remove the Role field from the Users compact layout to edit members.

1. From Setup, in the Quick Find box, enter `Profiles`, and then select **Profiles**.
2. Select a profile with a supported license and clone it, or click a custom profile.
3. Click **Edit**.
4. Select **Delegated External User Administrator**.
5. Click **Save**.
6. In the Delegated External User profiles related list, click **Edit**.
7. Select the profiles that you want the delegated external user administrator to manage.
8. In the Delegated External User Permission Sets, click **Edit**.
9. Select the permissions that you want the delegated external user administrator to manage.
10. Save your work.

External administrators can enable or disable a user or reset passwords from the Experience Cloud site that they belong to by clicking **Manage External User** > **View Partner User** on the contact's record. To ensure that the delegated external user administrator is set up for success, check that:

- Accounts and contacts are available on your delegated administrators site. The Account and Contact tabs are set to Default On. Optionally, field-level security and page layouts only display the account and contact fields you specify.
- Delegated external user administrators have "Create" and "Edit" permissions on contacts so that they can create and update contacts related to their account.
- Delegated external user administrators can assign all the permissions in the permission sets that you want them to manage.
- If delegated external administrators require access to personally identifiable information, such as usernames and aliases, select the **View Concealed Field Data** permission on the delegated external user administrator profile.
- These buttons are added to the **Salesforce Mobile and Lightning Experience Actions** section on the Contact page layout.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets

- **Disable Partner User**
- **Disable Customer User**
- **Enable Partner User**
- **Enable Customer User**
- **View Partner User**
- **View Customer User**

Give External Users Access to Manage Other Accounts

Authorize external users to manage permission sets for other users, reset passwords, activate, deactivate, or add members to other accounts. With the Account Switcher component, external users can easily access the other accounts.

Delegate Account Management to an External User

Give external users the power to manage account members and account brand information. Administrators, internal users, and partner users with the Delegated External User Administrator permission can create and edit a member, reset a member's password, and activate or deactivate a member. They can also upload brand logos and save company information for co-branded email templates to partner users, and create marketing campaigns, deal notifications, and websites.

SEE ALSO:

Create Experience Cloud Site Users

Grant Super User Access to a Partner User

Manage Personal User Information Visibility for External Users

Deactivate Users

Add Salesforce CRM Data to LWR or Aura Sites

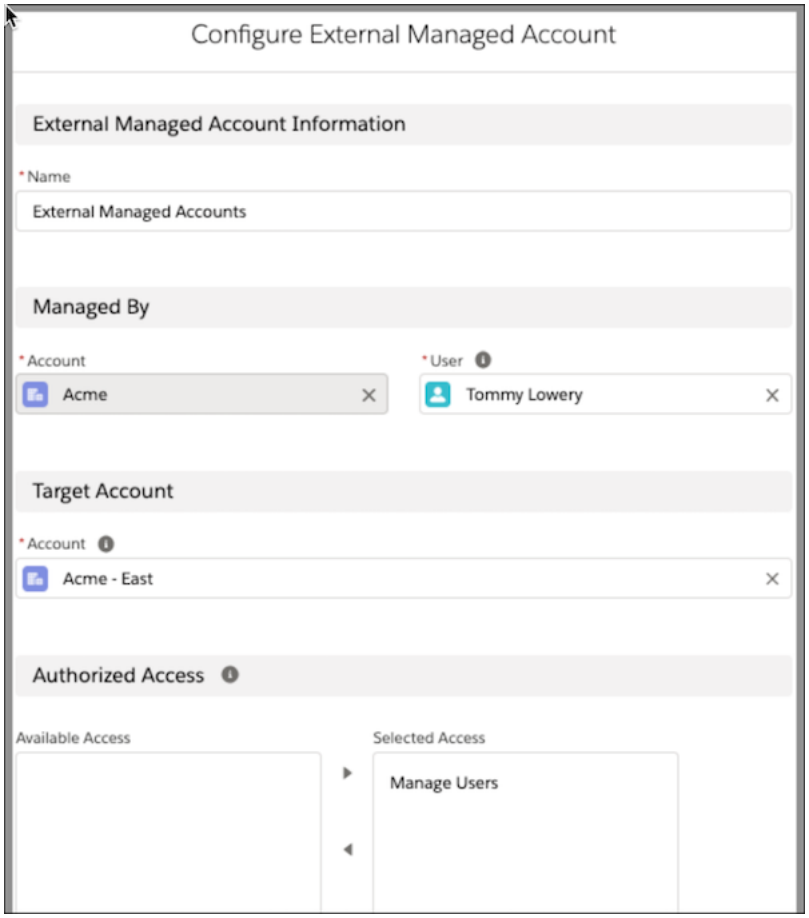
Add Tabs to Your Salesforce Tabs + Visualforce Site

Delegate Account Management to an External User

Give External Users Access to Manage Other Accounts

Authorize external users to manage permission sets for other users, reset passwords, activate, deactivate, or add members to other accounts. With the Account Switcher component, external users can easily access the other accounts.

Configure an external managed account to allow an external user to manage another account. An external managed account designates a managing user, the target account that they can manage, and the type of access they're authorized to on the target account.



EDITIONS

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, and delete profiles:

- Manage Profiles and Permission Sets

To view accounts:

- Read access on Accounts

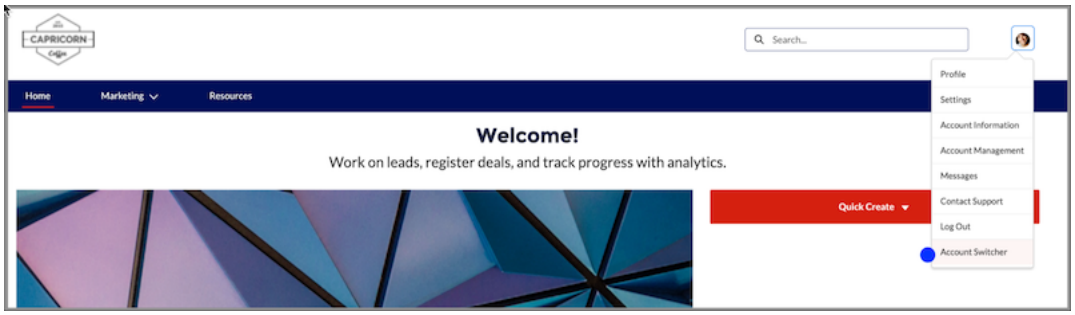
To manage other external users:

- Delegated External User Administrator permission

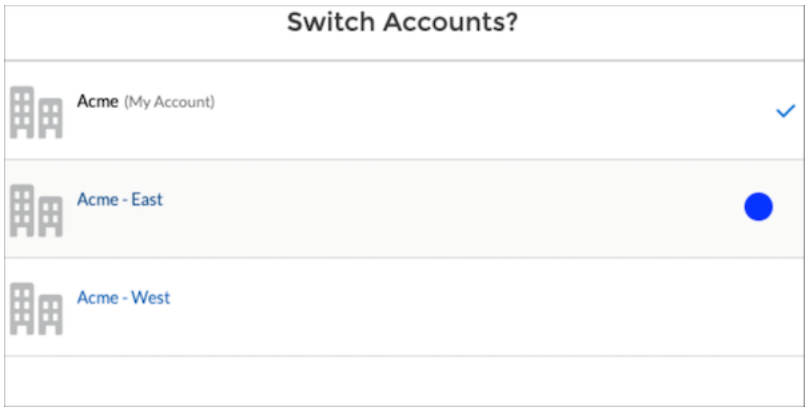
To access Target account information:

- Read access to the Target account.

After the managing user receives access to an account, the Account Switcher component gives them easy access to their target accounts. When using the Account Switcher component, the managing user can switch from their account to the target account's site by clicking their user profile and selecting Account Switcher.



A Switch Account window opens and a list of all their target accounts appears. A blue check mark indicates the account that the managing user is on. (My Account) indicates the account of the managing user.



After clicking a target account name, managing users are automatically redirected to the target account's site.

If you're using other components that track account IDs, you can use the `{!CurrentUser.effectiveAccountId}` as the Account Id value. This value shows the data of the account that is being switched to. For example, the Related Record list component shows the Members list on the Account Management page and uses `{!CurrentUser.effectiveAccountId}` by default in the Parent Record Id field. When a managing user uses the Account Switcher component to access a target account, the information on the Account Management page switches to the context of the target account.

You can also drive new behavior based on the account switcher by creating custom components by using `{!CurrentUser.effectiveAccountId}` as the Account Id value

1. Add the External Managed Account related list to the Account page.
   a. From the Object Manager, in the Quick Find box, enter `Account`.
   b. Select **Account** > **Page Layouts** > **Account Layout**.
   c. Click the **Related List** button, and drag the External Managed Account related list to the page.
   d. Go to the External Managed Account related list, and click the wrench icon to open the related list properties menu.
   e. Under Columns, add **Authorized Access** to the Selected Fields box, and click **OK**.
      Access is only available for Experience Builder sites.
   f. Save your changes.
2. Configure the external managed account.
   a. From the user's account record, scroll down to the External Managed Accounts related list.
   b. Click **Configure**.
   c. In the User field, enter the user's name. This user can switch between their account and the target account and view all contacts associated with the account.
   d. In the Target Account field, enter the name of the account that's being managed and switched to.
3. Authorize the managing user to reset passwords, add members, and activate or deactivate members of the target account, add Manage Users access.
   a. Grant the managing user Delegated External User Administrator permission. For more information on granting this permission, go to Delegate Site Administration to an External User on page 79.
   b. Under Authorized Access, add **Manage Users** to the Selected Access box.
   c. Save your changes.
4. Access the target account from a portal or site's user profile menu. If you're using the new customizable user profile menu, add the Account Switcher menu item. Otherwise, it appears by default.
   a. Go to Experience Builder, and click the user profile menu at the top of the screen.
   b. Click **Edit User Profile Menu**.
   c. Click **+ Add Menu Item**.
   d. In the Type field, select **Event**.
   e. In the Event field, select **Account Switcher**.
   f. Click **Save Menu**.

Create the Account Switcher User Permission Set

Create a permission set that allows an external user to switch to a different account from their account.

Create the Account Switcher User Permission Set

Create a permission set that allows an external user to switch to a different account from their account.

Available in: Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable Digital Experiences and create or change custom fields:
- Customize Application

To create, customize, or publish an experience AND to create stores and administer store settings:
- Create and Set Up Experiences
- View Setup and Configuration

To create, edit, and delete profiles or permission sets:
- Manage Profiles
- Permissions Sets

To assign permission sets:
- Assign Permissions Sets

The Account Switcher component allows external users to manage members from other accounts. External users with this permission can also make purchases on behalf of other accounts.

You can customize other components that use Account Switcher to drive business logic by using `{!CurrentUser.effectiveAccountId}` as the attribute value for account Id.

1. From Setup, in the Quick Find box, enter `Permission Sets`, and then select **Permission Sets**.
2. Under Permission Sets, click **New**.
3. Name the permission set `Account Switcher User`.
4. From the License dropdown menu, select a **Customer Community Plus** or **Partner Community** license.
5. Click **Save**.
6. Under Object Settings, select **Account**.
7. For all Account fields, select **Read Access**.
8. Click **Save**.
9. To add this permission to the external user who is managing an account, scroll down to Systems, and click **System Permissions**.
10. Click **Edit**, and select **Account Switcher User**.
11. Save your changes.

Delegate Account Management to an External User

Give external users the power to manage account members and account brand information. Administrators, internal users, and partner users with the Delegated External User Administrator permission can create and edit a member, reset a member's password, and activate or deactivate a member. They can also upload brand logos and save company information for co-branded email templates to partner users, and create marketing campaigns, deal notifications, and websites.

To allow external users with Delegated External User Administrator permission to access member and brand information, add the **Account Brand** and **Members** related lists to the Accounts detail page.

1. Select the icon of the account that you're managing, and select **Account Management**.

EDITIONS

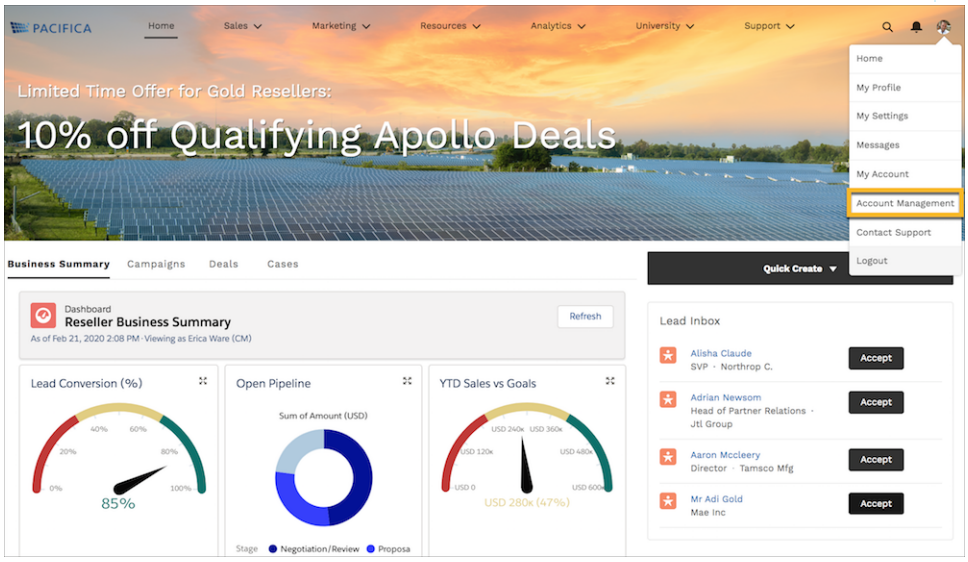
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets

To administer other members of the same site, as an external user:
- Delegated External User Administrator



Allow External Users to Manage Partner Members

In addition to administrators and internal users, partner users with the Delegated External User Administrator permission can activate, deactivate, create, and edit members. They can also reset member passwords.

Allow External Users to Manage Partner Brands

In addition to administrators and internal users, partner users with the Delegated External User Administrator permission can update and access partner brand information. They can also create co-branded emails, marketing campaigns, websites, and apps for channel sales from information uploaded to the Branding tab.

SEE ALSO:

Allow External Users to Manage Partner Members

Allow External Users to Manage Partner Brands

Allow External Users to Manage Partner Members

In addition to administrators and internal users, partner users with the Delegated External User Administrator permission can activate, deactivate, create, and edit members. They can also reset member passwords.

To allow partner users with the Delegated External User Administrator permission to manage other members, add the **Members** related list to Accounts page layout.

Note: To simplify the member creation process, configure a light user creation form for the delegated administrator to use. Go to **Setup** > **Object Manager** > **User** > **Member Page Layouts** to customize which fields are included on the Member page. You can remove Language and Locale Settings and Chatter from the form. Values for removed fields default to the settings of the delegated administrator. If your delegated admin is entering values other than their own in the Locale and Language and Chatter settings, leave them on the form.

1. Select the icon of the account that you're managing, and select **Account Management**.
2. From Account Management, select the **Members** tab to access a list of site members.

EDITIONS

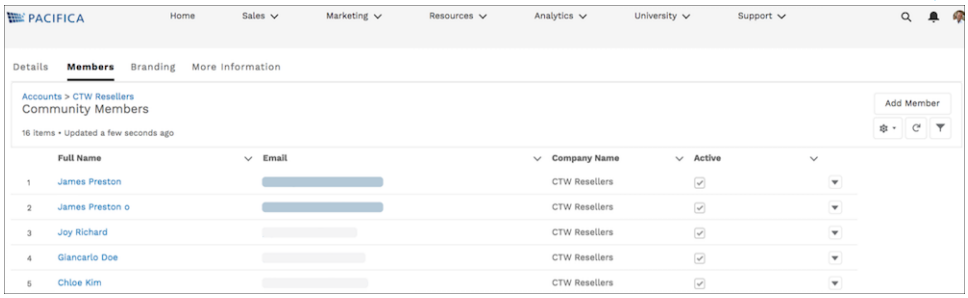
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

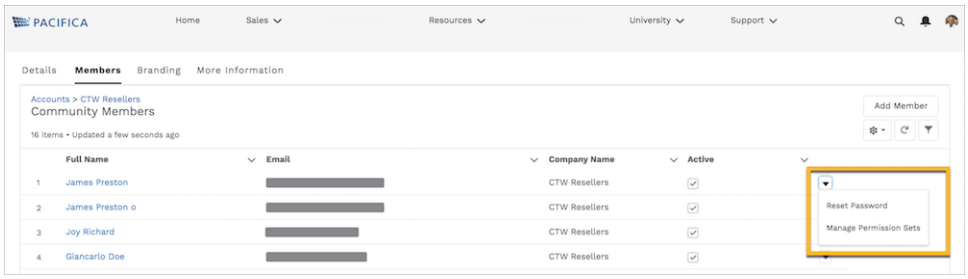
USER PERMISSIONS

To manage external users:
- Manage External Users

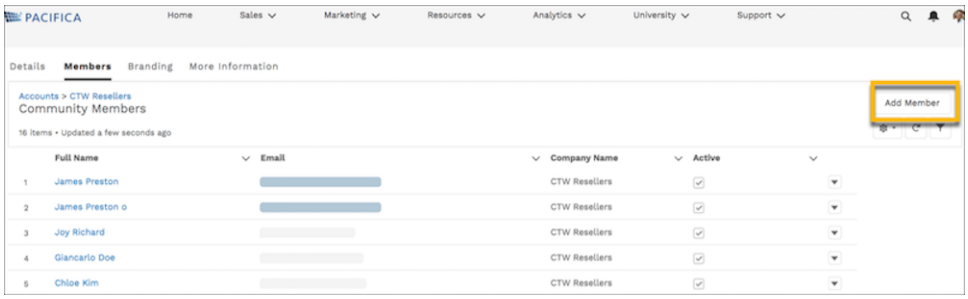
To create, edit, and delete profiles:
- Manage Profiles and Permission Sets



3. To reset a members password or manage their permission sets, select an option from the dropdown arrow on the member's row.



4. To activate or deactivate a member, select or deselect the box in the Active column.
5. To add a member to an account, click **Add Member**.



Allow External Users to Manage Partner Brands

In addition to administrators and internal users, partner users with the Delegated External User Administrator permission can update and access partner brand information. They can also create co-branded emails, marketing campaigns, websites, and apps for channel sales from information uploaded to the Branding tab.

To allow partner users with the Delegated External User Administrator permission to manage brands, add the **Account Brand** related list to the Accounts page layout.

1. Select the icon of the account that you're managing, and select **Account Management**.
2. To access the Account Brand Detail page, select the **Branding** tab.

EDITIONS

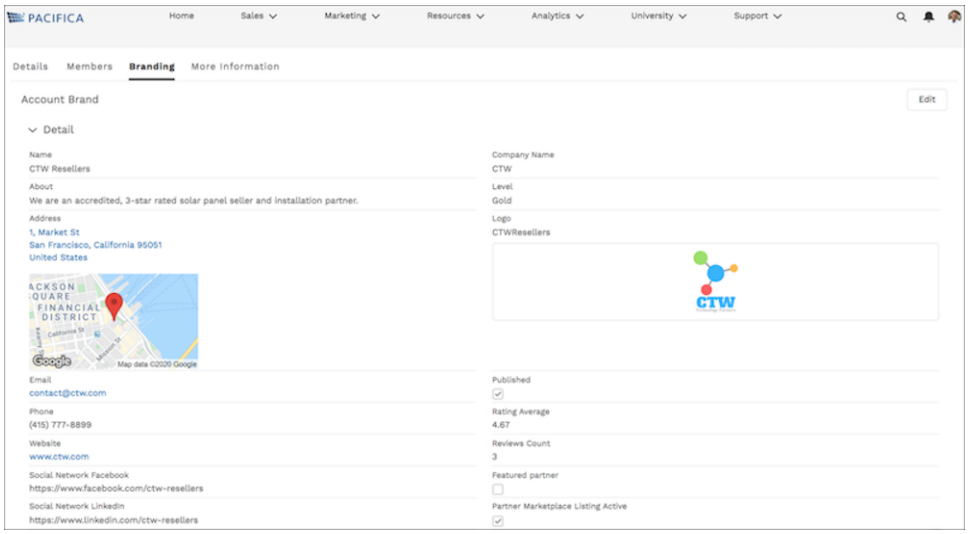
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets



Note: When you merge accounts with brands, the brand information associated with the primary account is retained. Brand information associated with the secondary account is moved to the Recycle Bin, even if there isn't brand information for the primary account.

3. To add account brand details, click **New**.
4. To update Account Brand details, click **Edit**.
5. To create co-branded emails or templates using information from the Account Brand page, use the merge fields under Sender Brand. These merge fields pull information directly from the Account Brand page. Users must have access to Account Brand to use the Account Brand merge fields, otherwise the merge fields are unresolved.

Experience Cloud Site Statuses

Experience Cloud sites can have one of these statuses: preview, inactive, active, and archived.

Status	Description
`Preview`	Customization of the Experience Cloud site isn't complete, and the site has never been activated. Once you activate an Experience Cloud site, you can't go back to `Preview` status. Users with Create and Set Up Experiences can access sites in `Preview` status if their profile or permission set is associated with the site. They can also share a link to these sites with users whose profiles or permission sets are associated with the site. The link for sharing a `Preview` site is located in Experience Workspaces, under Administration. No welcome emails are sent even if `Send welcome email` is selected. Note: If your org's access to Experience Cloud is suspended for non-payment, all your sites are deactivated, including the ones in Preview. When Experience Cloud is re-enabled, all sites are inactive. You can activate them, but you can't return to the Preview state. Preview sites count against the maximum number of sites you can have in your org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Status	Description
`Inactive`	The Experience Cloud site was previously `Active` but was deactivated. You may want to deactivate a site if you need to: • Add or remove members • Add, remove, or change the order of tabs • Change the color scheme • Change the site URL When you deactivate an Experience Cloud site , it no longer appears in the dropdown menu. Users with Create and Set Up Experiences can still access the setup for `Inactive` sites regardless of membership. If members try to access `Inactive` sites using a direct link, they see an error page. Welcome emails are sent if `Send welcome email` is selected or if the user's email settings are not enabled. Inactive sites count against the maximum number of sites you can have in your org.
`Active`	The Experience Cloud site is active and available to members. Welcome emails are sent to new members if `Send welcome email` is selected. Active sites count against the maximum number of sites you can have in your org.
`Archived`	• You can only archive inactive sites. If your site is in Preview, you must activate and then deactivate the site before archiving it. • When you archive a site, – The site's URL is unavailable to all users, including admins. – Instead of the site, users see a Site under maintenance page. – You can't access the site's Experience Builder or Workspaces. – The site doesn't count against your org's maximum 100 unarchived site limit.

Deactivate Your Site

Deactivate your site when you add or remove members; add, remove, or rearrange tabs; change the color scheme; or change the URL.

Archive a Site

Archive an inactive site so that users can no longer access it.

Unarchive a Site

Unarchive an archived site so that users can access it.

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites

Activate Your Site

Deactivate Your Site

Share a Link to Your Experience Cloud Site

Activate Your Site

Activate your site to make it accessible to members. The result of activation differs somewhat depending on whether you have a Salesforce Tabs + Visualforce site or a Lightning site.

- Salesforce Tabs + Visualforce: Activating the site makes the site URL active and enables login access for members. If welcome emails are enabled when you activate, a welcome email is sent to all members. If any of those users are new users, their welcome email includes their username and password.
- Lightning sites: Activating the site sends out a welcome email to all members. Activation is also required to successfully set up SEO for Lightning sites. To make the URL active and enable login access for members, publish the site.

Note: If your organization has enabled enhanced domains, site traffic is routed through a Salesforce content delivery network (CDN) partner. The partner is Akamai. Contact Salesforce Customer Support to opt out of the Salesforce CDN.

To activate a site:

1. From Setup, enter `Digital Experiences` in the global search box. Select **Sites**.
2. Open Experience Workspaces.
3. Click **Administration** > **Administration**.
4. Click **Activate**.
5. Click **OK**.

   Note: To ensure your contributors can access Experience Builder and Workspaces in an inactive community, enable the "Modify All Data" permission.

SEE ALSO:

Experience Cloud Site Statuses

Customize Salesforce Tabs + Visualforce Sites

Deactivate Your Site

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Deactivate Your Site

Deactivate your site when you add or remove members; add, remove, or rearrange tabs; change the color scheme; or change the URL.

Note: If a community license is removed from your org, members can still access sites associated with that license. To ensure security, deactivate sites that you wish to discontinue.

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**.
2. Click **Workspaces** next to the site you want to deactivate.
3. Click **Administration** > **Settings**.
4. Click **Deactivate**.

   After your site is inactive and offline, only users who have the Create and Set Up Experiences permission can access it. All other users see a Site Under Construction page.

SEE ALSO:

Experience Cloud Site Statuses

Activate Your Site

Customize Salesforce Tabs + Visualforce Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Archive a Site

Archive an inactive site so that users can no longer access it.

1. Open the Digital Experiences app from the App Launcher.

   Note: To update visibility and tab settings for profiles you want to have access to the Digital Experiences app and the All Sites page, see Enable Access to the Digital Experiences App.

2. Click **View All** in All Sites.
3. Click the name of the site you want to archive.
4. On the site detail page, click **Archive**.
5. Click **Archive** again.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

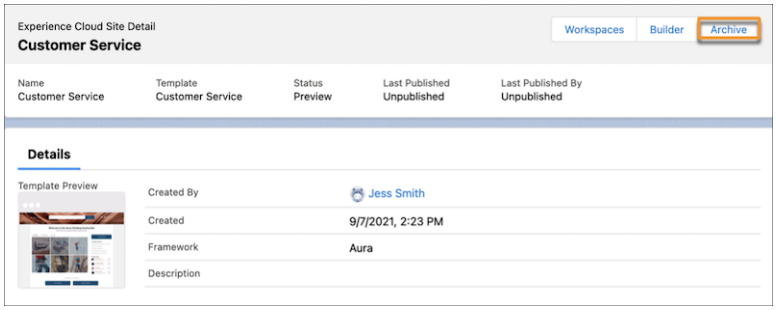
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To archive an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences



Your site is archived. If you change your mind, you can unarchive it.

Considerations for Archiving a Site

Before you archive a site, consider what types of sites can be archived, and the impact that archiving might have on users.

Considerations for Archiving a Site

Before you archive a site, consider what types of sites can be archived, and the impact that archiving might have on users.

- You can only archive inactive sites. If your site is in Preview, you must activate and then deactivate the site before archiving it.
- When you archive a site,
  - The site's URL is unavailable to all users, including admins.
  - Instead of the site, users see a Site under maintenance page.
  - You can't access the site's Experience Builder or Workspaces.
  - The site doesn't count against your org's maximum 100 unarchived site limit.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Unarchive a Site

Unarchive an archived site so that users can access it.

1. Access the Digital Experience app using the App Launcher.
2. Note: To update visibility and tab settings for profiles you'd like to have access to the Digital Experience app and the All Sites page, see Start Using Salesforce CMS.

   Click **View All** in All Sites.
3. Click the name of the site you'd like to unarchive.
4. On the site detail page, click **Unarchive**.
5. Click **Unarchive** again.

Your site is archived. If you change your mind, you can unarchive it.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

You must have at least one active community license in your org to use this feature.

USER PERMISSIONS

To unarchive an Experience Cloud site:

- Create and Set Up Experiences

Manage Site Emails and Notifications

Manage the emails that are sent out from your Experience Cloud site, and which notifications your members see.

Enable Notifications in Experience Builder Sites

With Global Notifications, your members receive messages wherever they're working, whether in their sites or in their apps. Members receive notifications on any screen—mobile, tablet, and desktop. This functionality is available in Experience Builder sites based on Customer Service (Napili), Partner Central, and any Lightning Bolt solutions.

Troubleshooting Steps If Site Members Don't Receive Welcome Emails

When you create a site, publish it, and then activate it, you expect site members to receive a welcome email that gives them access to the new site. Take these troubleshooting steps if site members don't receive welcome emails.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Customize Email Sent from Experience Cloud Sites for Email Verification

You can customize email sender information and Chatter email branding. You can also customize email templates, such as templates for welcoming new members and resetting members' passwords. Customize email templates in the user interface or with Visualforce.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

1. From Setup, in the Quick Find box, enter `All Sites`, and then select **All Sites**. Next to your site, click **Workspaces**.
2. Click **Administration**, and then select **Emails**.
3. Enter custom values for the email sender's name and address to replace the default values.

   If you change the sender's email address, we send a verification email to the new address. The change is pending, and we continue to use the existing address while we await verification. The requested address doesn't take effect until you click the confirmation link in the email. If verification is already pending for a new email address and you specify a different new address, we retain the latest value and use that value for verification.

   If you enter a custom value for the sender's address and you have enabled mail relay, your Chatter emails use the relay.

4. Customize the content that appears in the footer of Chatter emails.

   Welcome emails contain login information for external members. If you don't select this option, you must send username and password information directly to the user who's registering for your site. All Chatter emails display the Chatter logo and Salesforce information by default unless you replace them with your logo and information. If you previously customized the logo or footer text and want to restore the default values, use the API to set these fields to `null`.

   a. To replace the default Chatter logo, choose a logo. The logo must be an existing document in the Documents tab and must be marked Externally Available Image. Images of 150 x 50 pixels on a transparent background work best.

   b. To replace the default footer text, enter up to 1,000 characters. The default text includes the Salesforce name and physical address. We recommend including your physical address to comply with applicable anti-spam laws.

5. To send email to users when they're added to the site, select **Send welcome email**.

   Welcome emails contain login information for external members. If you don't select this option, you must send username and password information directly to the user who's registering for your site.

   Salesforce sends welcome emails when:

   - A site changes from Preview status to Active status. An inactive site doesn't receive emails unless the associated org has a default portal or if the user's profile is part of an active portal.
   - An admin adds a profile or permission set to an active site.
   - A user of an active site is assigned a profile or permission set.

   You can set the duration that the link provided in the welcome email is valid.

   a. From Setup, in the Quick Find box, enter `Digital Experiences`, and then click **Digital Experiences** > **Settings**.

   b. Change the link expiration duration under New User Email Settings and save your work.

   If a profile or permission set is part of multiple sites, users with that profile or permission set receive a welcome email from each site. The first email contains login credentials, but emails from subsequent sites simply contain a link to the site.

6. To send email to users when they receive a one-time password, for One-Time Password, look up and select the email template, `Communities: One-Time Password Email`.

   This one-time password email message isn't enabled by default. If you don't select this option, Salesforce sends a generic message for identity verification.

   Salesforce sends verification emails whenever users are required to confirm their identity.Salesforce also sends emails with one-time passwords for device activation when users log in from an unfamiliar browser, app, or IP address. This use case isn't covered by the One-Time Password email template. To customize emails sent for device activation, use the Device Activation Verification email template.

   - An external user attempts to log in to your site with an email address.
   - An external user attempts to register a mobile or U2F device.
   - An external user changes their email address.

7. To select an email template for Forgot Password, Change Password, Case Comment, User Lockout, One-Time Password, Old Email Address Change Verification, New Email Address Change Verification, Device Activation Verification, Self-Registration Micro-Batch Error, or One-Time Password For Headless Forgot Password Flow, click . Then select an email template from the list.

   Note: Password reset links expire after 24 hours.

   You can customize the default email templates.

   Note: When you customize the contents of a default email template, use the `{!Community_Url}` merge field to populate the URL for the current site. This field ensures that emails have the correct URL to direct users to the appropriate site. The `{!Community_url}` merge field isn't available for the User Lockout template.

8. Save your changes.

Emails that are sent as a result of approvals and workflows, and changes to unscoped objects, like cases, are sent based on-site membership. For example, if a workflow triggers an email, all the recipients are grouped based on-site membership and then one email is sent to each group. If the user is a member of multiple active sites, the email comes from the oldest active site.

Note: Objects that you can see whether you're in a site or your internal Salesforce org are called unscoped objects. Unscoped objects include records like opportunities, accounts, cases, and the like.

Another way to customize site emails is to use these fields on the API Network object.

- `CaseCommentEmailTemplateId`—ID of the email template used when submitting a comment on a case.
- `ChangePasswordEmailTemplateId`—ID of the email template used when notifying users that their password has been reset.
- `ChgEmailVerNewEmailTemplateId`—ID of the email template used when notifying users that their email address has been changed. This template is sent to the new email address.
- `ChgEmailVerOldEmailTemplateId`—ID of the email template used when notifying users that their email address has been changed. This template is sent to the old email address.
- `DeviceActEmailTemplateId`—ID of the email template used when users log in from an unrecognized browser, app, or IP address. The email contains a one-time password that users enter to verify their identity.
- `EmailFooterLogoId`—ID of the Document object that displays as an image in the footer of the site Chatter emails.
- `EmailFooterText`—Text that displays in the footer of site Chatter emails.
- `EmailSenderAddress`—Read only. Email address from which site emails are sent.
- `EmailSenderName`—Name from which site emails are sent.
- `ForgotPasswordEmailTemplateId`—ID of the email template used when users forget their password.

- `LockoutEmailTemplateId`—ID of the email template used when users try to reset their password after locking themselves out of their site from too many login attempts.
- `NewSenderAddress`—Email address that has been entered as the new value for `EmailSenderAddress` but hasn't been verified yet. After a user has requested to change the sender email address and has successfully responded to the verification email, the `NewSenderAddress` value overwrites the value in `EmailSenderAddress`. This value becomes the email address from which site emails are sent.
  - If verification is pending for a new email address, and you set `NewSenderAddress` to null, the verification request is canceled.
  - `NewSenderAddress` is automatically set to null after `EmailSenderAddress` has been set to the new verified address.
  - If verification is pending for a new email address, and you specify a different new address for this field, only the latest value is retained and used for verification.
- `OptionsSendWelcomeEmail`—Determines whether a welcome email is sent when a new user is added to the site.
- `VerificationEmailTemplateId`—ID of the email template used when users must verify their identity, for example, when they log in without a password or from a new device.
- `WelcomeEmailTemplateId`—ID of the email template used when sending welcome emails to new site members.

SEE ALSO:

Merge Fields for Experience Cloud Sites

Customize Salesforce Tabs + Visualforce Sites

Customize Buttons on the Tabbed Activity Composer

Use Your Classic Email Templates in Lightning Experience

Merge Fields for Experience Cloud Sites

You can personalize the email that you send to Experience Cloud site members by adding merge fields to your email templates.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

When you enable digital experiences in your org, Salesforce provides text-based email templates to simplify communicating with your Experience Cloud site members. You can use these templates to:

- Welcome new members
- Handle forgotten passwords
- Reset passwords
- Notify users when they're locked out after failing to log in after so many attempts
- Comment on cases
- Send one-time passwords when identity verification is required for multi-factor authentication or passwordless login
- Send one-time passwords when identity verification is required for device activation
- Send verification links in async email messages for identity verification
- Send verification emails when a user changes their email address

Experience Cloud site email templates have merge fields unique to sites. You can find them under the Network Member Fields field type. You can also use other merge field types, such as Receiving User and Organization. Here are a few merge fields commonly used in Experience Cloud site email templates.

Field Name	Description

`{!Network_Community_Name}`
OR
`{!Community.Name}`
OR
`{!Community_Name}`
	The name of the Experience Cloud site.

`{!Network_Community_Url}`
OR
`{!Community.Url}`
OR
`{!Community_Url}`
	The URL to the login page of the Experience Cloud site, for example, `https://MyDomainName.my.site.com/partners/login`.
	{!Community_Url} is populated in the:
	• Welcome New Member template when **Send welcome email** is selected
	• Forgot Password or Change Password template if the external user receiving the email is a member of the Experience Cloud site
	The login page URLs populated for authenticated LWR sites created after Winter '23 have a different structure than the login page URLs populated for all other Experience Cloud sites. Clicking the URL still directs users to your site's login page as expected.

`{!Receiving_User.Username}`	The username of the user receiving the email. This field only renders for mass emails.

`{!NetworkMember.Operating_System}`
OR
`{!Operating_System}`
	The operating system of the Experience Cloud site member.

`{!NetworkMember.EmailVerify_Url}`
OR
`{!EmailVerify_Url}`
	The verification link sent to a user via email.

`{!ChgEmailVer.NewEmail}`
OR
`{!ChgEmailVer.OldEmail}`
	The user's email address.

`{!ChgEmailVer.URL}`	The verification link sent to a user via email when their email address is changed.

Note: Available merge fields differ between email templates. View Available Merge Fields at the top of each email template to see the available fields.

For more flexibility, you can create custom Experience Cloud site email templates in Visualforce. For a Visualforce email template, use the `$Network` global merge field type and its properties, as described in this table. These fields are populated only in Visualforce Experience Cloud site email templates.

Field Name	Description
`$Network.ActionForVerificationEmail`	Used in one-time password (OTP) and device activation emails to specify the action that prompted sending a verification email.
`$Network.AsyncVerificationLink`	Used in asynchronous emails to send a verification link (URL) to users. Users click the link to verify their email address with Salesforce. After verifying their email address, external users can log in with a one-time password (OTP) via email (passwordless login).
`$Network.BrowserForVerificationEmail`	Used in OTP and device activation emails to specify the browser where the action occurred that prompted sending a verification email.
`$Network.CodeForVerificationEmail`	The verification code sent in the OTP or device activation email.
`$Network.ChgEmailVerOldEmail`	The user's old email address, when they change it.
`$Network.ChgEmailVerNewEmail`	The user's new email address, when they change it.
`$Network.ChgEmailVerLink`	The link, sent to the user's new email address, that the user follows to verify their email address change.
`$Network.Name`	The name of the Experience Cloud site.
`$Network.NetworkUrlForUserEmails`	The URL to the login page of the Experience Cloud site, for example, `https://MyDomainName.my.site.com/partners/login`. If this merge field is in the welcome email to new members, the URL is appended with a link to a reset password page.
`$Network.OperatingSystemForVerificationEmail`	Used in OTP and device activation emails to specify the operating system where the action occurred that prompted sending a verification email.

`$Network.passwordLockTime`
OR
`{!PASSWORD_LOCK_TIME}`
	Used in the formula field for lockout emails to specify how long a user must wait until logging in again after being locked out.

For more information on creating Visualforce templates, see the Visualforce Developer Guide.

If your Experience Cloud site uses cases, approvals, or workflows, emails created from an email template that use the `{!<any_object>.Link}` or `{!Case.Link}` merge fields include a link to the record in the site. If the user receiving the email is a member of multiple active Experience Cloud sites, the link goes to the oldest active site. If the user is already logged in to a site and clicks the link in the email, the link goes to that site. If the user isn't a member of any site, the link goes to the internal org. If the user is a member of a portal and a site, the link goes to the site.

Field Name	Description
`{!Case.Link}`	Used in: • Case comment notifications to contacts and owners

Field Name	Description
	• Case creation and update notifications to contacts
`{!<any_object>.Link}`	Used in: • Approval requests sent to approvers and delegated approvers • Workflow email alerts

To insert merge fields into your Experience Cloud site email templates:

1. From Setup, enter *Email Templates* in the Quick Find box, and select **Classic Email Templates**. Next to an email template, click **Edit**.
2. Under Available Merge Fields, from the dropdown menu, select the field type, and then select the field. For merge fields specific to sites, select **Network Member Fields**.
3. Copy the merge field value into the body of the email template.

SEE ALSO:

Customize Email Sent from Experience Cloud Sites for Email Verification

Email Templates in Salesforce Classic

Customize the One-Time Password Email Template

You can customize the email that you send to external users to verify their identity with a one-time password (OTP). The email includes a verification code that users enter to prove their identity. Control how you communicate with your customers and partners by rewording the email that comes with the verification code.

Salesforce sends out an email with an OTP for email verifications in these scenarios.

- Headful passwordless login—Set up a login page for your Experience Cloud site that allows users to log in with their email address. You create a passwordless login page from your site's Login & Registration page. See Brand Your Identity Experience.
- Headless passwordless login—Allow users to log in to your off-platform app with an email address or phone number.

Salesforce also sends an email with a one-time password for device activation email verifications. To customize this notification, see Device Activation Email Template.

The one-time password email template is available to Experience Builder sites as of Winter '19.

1. From Setup, enter `All` in the Quick Find box, and select **All Experiences**. Next to your site, click **Workspaces**.
2. Select **Administration**, and then select **Emails**.
3. Under Email Templates, click next to One-Time Password, and select **Experience Cloud: One-Time Password Email**.
4. Click **Save**.

   Your site is set up to send verification code notifications to users.
5. To customize the notification, edit the email template.
   a. From Setup, enter `Email Templates` in the Quick Find box, and select **Classic Email Templates**.
   b. Next to Experiences: One-Time Password Email, select **Edit**.
   c. Edit the text in the email body.

      Note: Don't remove `{!Verification_Code}`.
   d. (Optional) In the email body, insert merge fields listed under Available Merge Field. To get the merge field value, select a field type, and then select a field. Copy and paste the merge field value into the email body.

      For example, from the Field Type dropdown, select **Network Member Fields**, and then select **Site Name**. The Merge Field Value displays `{!Community.Name}`.
   e. Click **Save**.

You can also use Visualforce to create a custom OTP email template using the `$Network` global merge field type.

EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

Customize the Device Activation Email Template

Customize the email you send to verify a user's identity when they access your Experience Cloud site from an unfamiliar browser, application, or IP address. The email includes a one-time password (OTP) that users enter to verify their identity. Change the look and wording of the email to match your brand.

Device activation works differently based on whether you've configured a trusted IP address range. If you haven't defined a trusted IP range, users are prompted to verify their identity when they log in from a new browser or app. If you have defined a trusted IP range, users must verify their identity when they log in from an IP address outside of the range. For more information on how device activation works, see Device Activation.

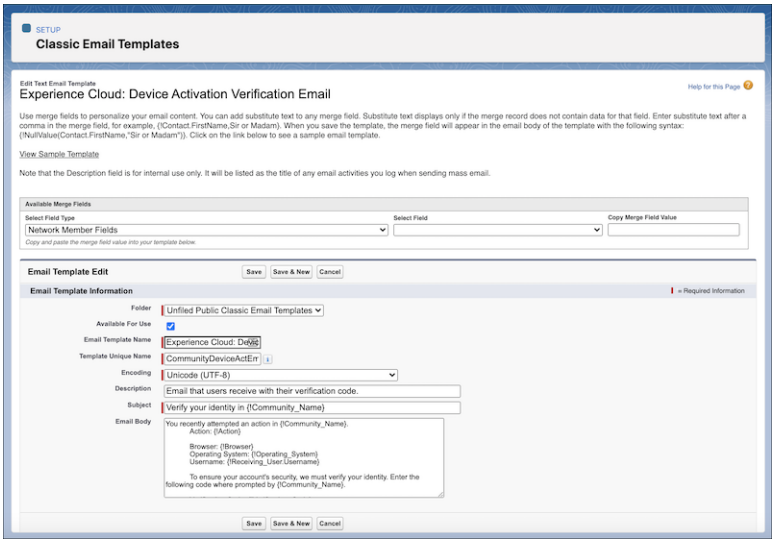
You can enable device activation for Experience Cloud site users through Profiles in Session Settings.

1. From Setup, in the Quick Find box, enter `Sites`, and then select **All Sites**.
2. Next to your site, click **Workspaces**.
3. Select **Administration**, and then select **Emails**.
4. Under Email Templates, click next to Device Activation Verification, and select **Experience Cloud: Device Activation Verification Email**.
5. Save your settings.
   Your site is set up to send device activation notifications to users.
6. To customize the notification, edit the email template.
   a. From Setup, in the Quick Find box, enter `Email Templates`, and then select **Classic Email Templates**.
   b. Next to Experience Cloud: Device Activation Verification Email, click **Edit**.
   c. Edit the text in the email body.

   Note: Don't remove `{!Verification_Code}`.

   a. Optionally, to personalize the text, use the available merge fields listed at the top of the page. For more information, see Merge Fields for Experience Cloud Sites.

Example:



EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Customize the User Lockout Email Template

You can customize the email template you send to users when they attempt to reset their password after getting locked out of your Experience Cloud site due to too many failed login attempts. You can change the look to match your brand and how and when users can unlock their accounts.

Users are unable reset their passwords when their accounts are locked. Depending upon their password policy, they may need to wait awhile or contact an admin to unlock their account before they can reset their password. Admins set the password policy, including the maximum allowable invalid login attempts, on the site user's profile page. This password policy determines the next steps users take to unlock their account. The default email template includes a formula that checks the profile's password policy and pulls that information into the notification sent.

The user lockout email template is available to Experience Builder sites as of Summer '18.

1. From Setup, enter `All` in the Quick Find box, and select **All Experiences**. Next to your site, click **Workspaces**.
2. Select **Administration**, and then select **Emails**.
3. Under Email Templates, click next to User Lockout, and select **Experiences: User Lockout Email**.
4. Click **Save**.
   Your site is set up to send notifications to users when they're locked out of their accounts.
5. To change the formula or make other customizations, edit the email template.

   Note:

   - The formula included in this template is only for lockout emails. When applied to another email type, the formula returns a blank message.
   - The `{!Community_url}` merge field isn't available for the lockout template.

   a. From Setup, enter `Email Templates` in the Quick Find box, then select **Classic Email Templates**.
   b. Next to Experiences: User Lockout Email, select **Edit**.
   c. Edit the text in the email body. To personalize your email content, use the available merge fields listed at the top of the page.
   d. Click **Save**.

Example: If the password policy locks users out for 15 minutes before they can try to log in again, the formula returns the following message: "Try again in 15 minutes."

EDITIONS

Available in: Experience Builder site

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Subject You've been locked out of {!Community_Name}

Plain Text Preview

Hello {!Receiving_User.FirstName},

We received your request to reset your {!Community_Name} password. We can't reset your password right now. Your account is locked after too many login attempts.

```
{!CASE(1,
IF(VALUE(PASSWORD_LOCK_TIME) > 0, 1, 0), "Try again in " + PASSWORD_LOCK_TIME + " minutes.",
IF(VALUE(PASSWORD_LOCK_TIME) < 0, 1, 0), "Contact your " + Community_Name + " administrator to unlock your account.",
"")}
```

If you didn't request a password reset or haven't tried to log in to your account recently, contact your {!Community_Name} administrator or reply to this email.

Thank you,
{!Community_Name}

Customize the Email Address Change Template

You can customize the email template you send to users when they change the email address they use with Salesforce. Change the look to match your brand and the wording of the message.

Salesforce sends two verification emails to a user when the user changes their email address. One is sent to the user's old email address, and one is sent to the new one. The user clicks the verification URL in the email sent to the new address, and completes the email address change. You can customize those emails. If you change a user's email address for them, no email change verification email is sent.

The Email Address Change Verification email templates are available to Experience Builder sites as of Winter '21.

1. From Setup, enter `All Experiences` in the Quick Find box, and select **All Experiences**. Next to your site, click **Workspaces**.
2. Select **Administration**, and then select **Emails**.
3. Under Email Templates, click next to Old Email Address Change Verification and select **Experiences: Old Email - Change Email Verification**.
4. Under Email Templates, click next to New Email Address Change Verification and select **Experiences: New Email - Change Email Verification**.
5. Click **Save**.
   Your site is set up to send notifications to users when their email addresses change.
6. To make customizations, edit the email template.

   Note: You can use the `{!ChgEmailVer.NewEmail}`, `{!ChgEmailVer.OldEmail}`, and `{!ChgEmailVer.URL}` merge fields.

   a. From Setup, enter `Email Templates` in the Quick Find box, then select **Classic Email Templates**.
   b. Next to Experiences: Old Email - Change Email Verification or Experiences: New Email - Change Email Verification, select **Edit**.
   c. Edit the text in the email body. To personalize your email content, use the available merge fields listed at the top of the page.
   d. Click **Save**.

Example:

EDITIONS

Available in: Experience Builder sites

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

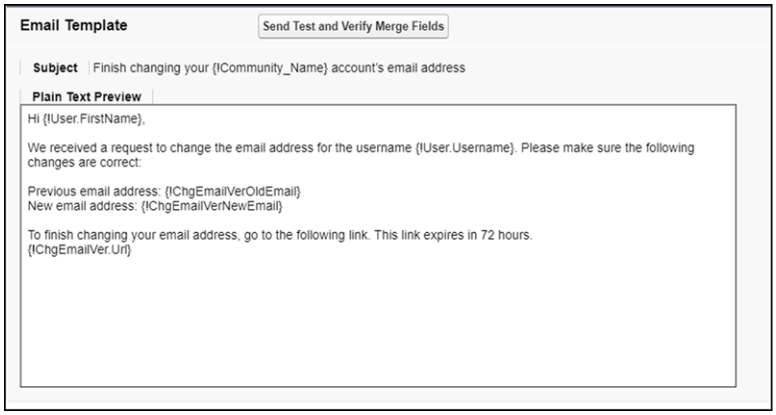
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



SEE ALSO:

Customize Email Sent from Experience Cloud Sites for Email Verification

Merge Fields for Experience Cloud Sites

Customize the Headless Registration Email Template

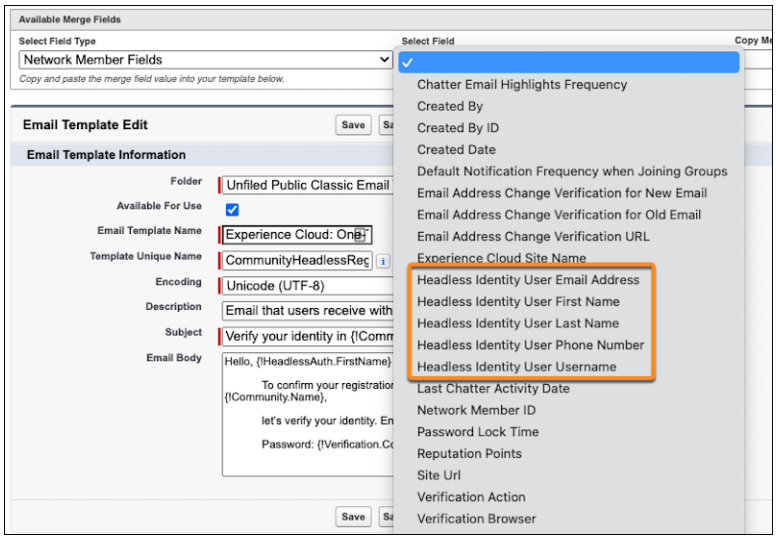
When you configure headless registration for an off-platform app, you can customize the one-time password (OTP) email that users receive to verify their identity. Edit the default email template to match your company's branding. Keep in mind that this email template is only for headless registration in an app outside of the Salesforce platform. It isn't designed for users registering or logging in to an Experience Cloud site.

1. From Setup, in the Quick Find box, enter `Sites`, and then select **All Sites**. Next to the Experience Cloud site for your Headless Identity implementation, click **Workspaces**.
2. Select **Administration**, and then select **Emails**.
3. Under Email Templates, next to One-Time Password for Headless Registration, click , and then select **Experience Cloud: One-Time Password Email for Headless Registration Verification**.
4. Save your changes.
5. To customize the email, edit the template.
   a. From Setup, enter `Email Templates` in the Quick Find box, and select **Classic Email Templates**.
   b. Next to Experience Cloud: One-Time Password Email for Headless Registration Verification, select **Edit**.
   c. Edit the text in the email body.

      Note: Don't remove `{!Verification_Code}`.

   d. To add more fields to the email, copy merge field values into the template. Under Available Merge Fields, select a field type, select a field, and then copy and paste the merge field value into the email body.

      For merge fields specific to Headless Identity, select **Network Member Fields** for the field type.



   e. Save your changes.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Enable Notifications in Experience Builder Sites

With Global Notifications, your members receive messages wherever they're working, whether in their sites or in their apps. Members receive notifications on any screen—mobile, tablet, and desktop. This functionality is available in Experience Builder sites based on Customer Service (Napili), Partner Central, and any Lightning Bolt solutions.

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

To create, customize, or publish a site:
- Create and Set Up Experiences AND View Setup and Configuration

All events that trigger notifications are supported. Members can even trigger notifications on record feeds. For example, an internal member can trigger a notification from the Salesforce org by @mentioning an external member on a lead or opportunity. When a member clicks a notification, the originating detail page or other appropriate location is displayed for easy collaboration across sites and apps.

Note:
- If you use the Build Your Own (Aura) template, create the Feed Detail page so you can see notifications.
- Replies on threaded discussions only trigger notifications for the post owner.

By default, the Notifications icon is hidden in existing sites and displayed in new sites.

1. In Experience Builder, click on the left sidebar and then click **Theme**.
2. For the default Customer Service theme layout, show or hide Notifications for your members by selecting **Hide Notifications icon in site header**.

Manage Your Site Email Notifications
Use email notifications to keep up with important updates in your Experience Cloud sites.

Manage Your Site Email Notifications

Use email notifications to keep up with important updates in your Experience Cloud sites.

You can choose to receive email notifications whenever someone posts on your profile, comments after you on a post you've commented on, posts to a group you belong to, and more. Email notification preferences are set by community.

To set your email preferences, go to your profile page within a community, click the dropdown button ( ) in the upper-right corner and select **My Settings**, then click **Email Settings**. You can turn individual notifications on or off.

Your chosen settings apply to the current community. If you don't belong to any groups yet, you won't see the option to set groups on this page until after you join your first group. You can also

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Visualforce sites

set your group email preferences using the **Email Me...** dropdown on each group's page. You can choose to receive a daily or weekly digest email or an email every time someone posts. This option is visible if you're a group member.

Your email options are similar to the Chatter email settings in your internal organization under your personal settings (*Your Name* > **My Settings** > **Email Settings** for Chatter Free users). Within communities, however, note the following differences.

Warning: Avoid spamming new group members in a community, especially if you are adding group members en masse. Deselect the following org-wide Chatter email notifications: **Allow Emails** and **Allow Posts via Email**. Access these settings by searching *Email Settings* in the Quick Find search box in Salesforce Setup.

- The default notification frequency for new groups you join can't be set via the user interface. It can be set only via Salesforce APIs (SOAP API and REST API).
- Personal digests aren't currently available.
- You don't receive notifications when new articles are added to topics.
- If your community has Chatter messages enabled, you're notified of file shares in a message. If Chatter messages aren't enabled, you are notified of file shares by email.
- If flagging is enabled in the community, the **Flags an item as inappropriate** option appears for all members of the community, but only sends notifications if:
  - You're a group owner or manager and a member flags a post, comment, or file in your group.
  - You're a moderator and a member flags a post, comment, or file you have access to. Depending on the type of notification you want to receive, you also need following permissions:

Email Notifications About	Required Permission
Flagged posts and comments	"Moderate Community Feeds"
Flagged files	"Moderate Community Feeds"
Flagged Chatter messages	"Moderate Community Feeds" and "Moderate Communities Chatter Messages"
Flagged direct messages	"Moderate Communities Chatter Messages"

If the **Flag as Inappropriate** link doesn't work in your email, try flagging the message from the UI.

SEE ALSO:

Navigate to Chatter Email Settings

Troubleshooting Steps If Site Members Don't Receive Welcome Emails

When you create a site, publish it, and then activate it, you expect site members to receive a welcome email that gives them access to the new site. Take these troubleshooting steps if site members don't receive welcome emails.

- To ensure that you added the correct user profiles or permission sets, check your site's membership. Make sure that the correct users are assigned to the correct member profiles or assigned the correct permission sets.
- Make sure that the Send welcome email option is selected in **Workspaces** > **Administration** > **Emails**.
- Check the email deliverability status to ensure that No Access isn't selected. In Setup, enter `Deliverability` in the Quick Find box, and click **Email Deliverability**. Ensure that Access level isn't set to **No Access**.
- Check email logs to ensure that the emails were sent. In Setup, enter `Email Log Files` in the Quick Find box, and click **Email Log Files**. Click **Request an Email Log**, and enter the time period to check. After you receive the email log, check to see if emails were sent from Salesforce to your members.
- Check the spam folder to ensure that emails aren't marked as spam.
- Set a verified Organization-Wide Email Address.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Access Experience Cloud Sites in the Salesforce Mobile App

Accessing Experience Cloud sites from the Salesforce mobile app depends on several factors, including the type of template used to create the site and the licenses and permissions of site users.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Grant the Necessary Permissions

Make sure that site users can access the Salesforce mobile app.

- Verify that the mobile app is enabled for your org (default) or enable it. From Setup, enter `Settings` in the Quick Find box, then select **Salesforce Settings**.
- Allow site access via the Salesforce mobile app by granting the "API Enabled" profile permission to external users with communities licenses. From Setup, enter `Profiles` in the Quick Find box, then select **Profiles**. Select **Edit** on a profile to add the profile permission.

Salesforce Tabs + Visualforce Sites

Sites that use the Salesforce Tabs + Visualforce template aren't supported in the Salesforce mobile app.

Type of User	How to Access a Site
Users with standard Salesforce licenses Internal org users who are also in a community	Log in to the mobile app. Use the mobile App Launcher at the top of the navigation menu and select a community.
External users with the following community licenses: • Customer Community • Customer Community Plus • Partner Community	Not supported

Type of User	How to Access a Site
• Customer Portal • Partner Portal • High-Volume Portal User • Lightning External Apps • Lightning External Apps Plus	
Unlicensed users (also known as guest users)	Not supported

Aura and LWR Sites

Experience Builder sites aren't supported in the Salesforce mobile app.

We recommend that you create and distribute a fully branded mobile app version of your Experience Cloud sites using Mobile Publisher. Users can also access Experience Builder sites from a supported mobile browser on page 9 using the site URL.

Experience Management, Experience Workspaces, and Experience Builder

Experience Management and Experience Workspaces aren't available. We recommend that you use the supported browsers on desktop computers to make customizations in Experience Management, Experience Workspaces, and Experience Builder.

Experience Cloud Sites: What's Different or Not Available in the Salesforce Mobile App

Experience Cloud sites in the Salesforce mobile app are similar to the Lightning Experience desktop site, with some differences.

Experience Cloud Sites: What's Different or Not Available in the Salesforce Mobile App

Experience Cloud sites in the Salesforce mobile app are similar to the Lightning Experience desktop site, with some differences.

- The navigation menu for an Experience Cloud site doesn't include all the items that are available to your internal org:
  - The navigation menu shows only the tabs that the admin has included in that site via Tabs & Pages in the site's administration settings.
  - The Events and Today items aren't available and don't appear in the navigation menu.
  - Tasks are available only to users with the Edit Tasks permission.
  - The Reports item isn't available and doesn't appear in the navigation menu.
- There's no All Company nor Company Highlights feed.
- Adding inline images to a post isn't available.
- Experience Management and Experience Workspaces aren't available.
- Site.com branding isn't supported.
- Members can't flag private messages as inappropriate.
- Reputation isn't supported. However, if reputation is enabled and set up in the desktop site, users do accrue points when using the Salesforce mobile app. Users can view their points in the desktop site only.
- Search is scoped to the Experience Cloud site and returns only items from the current site. The only exception is records, since they're shared across sites and the internal org.

- Role-based external users can approve and reject approval requests from the Approval History related list on records, but they can't submit requests for approval.
- A user's list of notifications includes notifications from all Experience Cloud sites the user is a member of. The name of the site in which the notification originated appears after the timestamp.
- External users accessing Experience Cloud sites don't see a help link.
- Photos appear next to users' names in the People list.
- The Experience Builder template and your user licenses determine how you can access Experience Cloud sites. For more information, see *Access Experience Cloud Sites in the Salesforce Mobile App* in Salesforce Help.
- Group members in Experience Cloud sites can't edit their email and in-app notification settings. As a workaround, users can set their group email notification preference to **Every Post** in the site from the desktop site. Selecting this option enables both email notifications and in-app notifications for that group.
- Push notifications for Experience Cloud sites aren't supported in the Salesforce mobile app. Their navigation and authentication behavior can vary for members with both an internal and external login or multiple external logins. We recommend that users with multiple logins access a site from a supported mobile browser using the site URL. In a mobile browser, site users receive notifications via the bell icon and notification tray.
- Direct message notifications aren't supported in mobile sites. If a user receives a direct message while using the mobile website, the bell notification doesn't display a new message.
- Experience Cloud sites aren't available when the mobile device is offline.
- The Experience Cloud site's Related List - Single component isn't supported for Files.
- The Record Headline component doesn't support Chatter actions or field labels.
- You can't create a record from a lookup field.

Enable Other Salesforce Features in Experience Cloud Sites

Experience Cloud offers a platform to expose Salesforce features and functionality to site members. For example, enable Salesforce Knowledge so customers can view knowledge articles in your site. Enable case feeds to facilitate discussions over customer cases. There's also Chatter Questions, direct messages, Question-to-Case, and field service data.

Cross-Cloud Features

Enable cross-cloud features so users in your Experience Cloud sites can access them. Some objects and features available in specific clouds, like Industries and Commerce Cloud, require add-on licenses.

Service Cloud Features

Enable Service Cloud features, such as Salesforce Knowledge and Site Case Feed, for your self-service sites in Experience Cloud. Some objects and features, like Field Service, require add-on licenses.

Sales Cloud Features

Enable Sales Cloud features so that your partners can sell products quickly using partner relationship management (PRM) sites in Experience Cloud. Some objects and features, like Commerce Cloud, require add-on licenses.

Collaboration Features

Enable collaboration features so users in your Experience Cloud sites can collaborate with one another and with employees in your org.

Cross-Cloud Features

Enable cross-cloud features so users in your Experience Cloud sites can access them. Some objects and features available in specific clouds, like Industries and Commerce Cloud, require add-on licenses.

Enable Objects for Experience Cloud Site Users

Enable Salesforce standard and custom objects for external users so that they have access from your Experience Cloud sites.

Enable Objects for Experience Cloud Site Users

Enable Salesforce standard and custom objects for external users so that they have access from your Experience Cloud sites.

Objects are available without any additional setup in Lightning Web Runtime (LWR) and Aura sites. Add the object-related components to the canvas, and customize for your business needs. Guest and authenticated users can access the object pages based on their sharing and visibility settings. To show objects in Salesforce Tabs and Visualforce sites:

1. In the site's workspaces, access **Administration** > **Tabs**. Add the object tab to the list of available tabs in your site.
2. Set tab visibility and the object permissions needed for your use case using a permission set.

SEE ALSO:

Restrict Experience Cloud Site User Access to Cases

Merge Fields for Experience Cloud Sites

Enable Portal Reply Email Notifications in Case Feed

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To enable objects:

- Manage Profiles and Permission Sets

Service Cloud Features

Enable Service Cloud features, such as Salesforce Knowledge and Site Case Feed, for your self-service sites in Experience Cloud. Some objects and features, like Field Service, require add-on licenses.

For more information on how to use sites for different customer use cases, check out:

- Manage Customer Relationships with Experience Cloud
- Give Customers Access to Your Knowledge Base Through Help Center

Enable Salesforce Knowledge in Your Experience Cloud Site

Enable Salesforce Knowledge to quickly get articles to your customers and agents in an Experience Cloud site. Knowledge articles provide accurate information to customers when and where they need it.

Site Case Feed

With the site case feed, agents and Experience Cloud site members see the lifecycle of a case from start to finish. All case interactions appear in a unified, chronological Chatter case feed. Site members benefit from the added functionalities of Chatter, while service features help agents provide efficient, personalized support.

Question-to-Case

Question-to-Case lets moderators create cases from questions in Chatter, which makes it easier to track and resolve your customers' issues. Question-to-Case is available in your Salesforce org and Salesforce mobile web, as well as in Aura and Salesforce Tabs + Visualforce sites where Chatter Questions is enabled.

Restrict Experience Cloud Site User Access to Cases

Determine whether users with Customer Community Plus licenses can view and edit cases in which they're listed as the contact. You can disable the standard sharing behavior that grants the assigned contact and everyone in their role hierarchy access to a case. After disabling this sharing behavior, you can control access to cases by creating a manual share or by using Apex managed sharing.

Enable Salesforce Knowledge in Your Experience Cloud Site

USER PERMISSIONS	
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences • OR • Be a member of the site AND an experience admin, publisher, or builder in that site
To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences • OR • Be a member of the site AND an experience admin or publisher in that site
To set up Salesforce Knowledge, create article types and article actions, and modify category groups assignments:	• Customize Application • AND • Manage Salesforce Knowledge
To assign user licenses:	Manage Internal Users
To create data categories:	Manage Data Categories

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Experience Cloud sites are available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions. The Help Center template is available in **Essentials** Edition.

Salesforce Knowledge is available in: **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in **Enterprise** and **Unlimited** Edition.

Applies to: LWR, Aura, and Visualforce sites

Enable Salesforce Knowledge to quickly get articles to your customers and agents in an Experience Cloud site. Knowledge articles provide accurate information to customers when and where they need it.

Note:

- Your Salesforce org needs at least one Salesforce Knowledge license to enable and set up Salesforce Knowledge.
- Salesforce Tabs + Visualforce site members without the Knowledge One permission can't access Salesforce Knowledge through sites. They also can't access Salesforce Knowledge in sites via Salesforce for Android or Salesforce for iOS.

If you haven't yet, check out Salesforce Knowledge. After setting up your knowledge base, either in Salesforce Classic or Lightning Experience, complete these steps to view articles in your Experience Cloud sites.

1. Use permission sets to give users Read permissions.
   a. In Setup, enter `Permission Sets` in the Quick Find box, and then click **Permission Sets**.
   b. Give Read permission for the article types (Salesforce Knowledge in Classic) or record types (Lightning Knowledge) that you want to share with users.
   c. Give Read permissions to each guest user profile you'd like to have access to Salesforce Knowledge.

> **Note:** There are a few reasons why a user can't find an article: it's deleted or archived, it doesn't exist, it has no assigned topic, or the user doesn't have the access to view it. When an article isn't available, guest users are directed to a login page and logged-in users see an "Invalid Page" error.

   d. Assign the permission sets to the correct user profiles for your sites.

2. From Setup, enter `Topics for Objects` in the Quick Find box, then select **Topics for Objects**.
   a. In Classic Knowledge, enable topics for all the article types you want to include.
   b. In Lightning Knowledge, enable topics for Knowledge.
3. Salesforce Knowledge uses data categories to organize content. Experience Builder sites use topics. To ensure that your articles appear in search results, assign a topic to each article. You can easily map articles in your data categories to topics in a site. Follow these steps to map articles to topics automatically.
   a. In Experience Workspaces of an Aura site, click **Content Management** > **Topics** > **Automatic Topic Assignment**. After enabling Automatic Topic Assignment, map topics to data category groups and data categories. You can choose to add the topics to all the articles existing in data categories, and to articles added in the future. You can map your exact hierarchy from data categories to topics, up to eight levels of depth.
   b. In LWR sites, use the Knowledge components to show knowledge articles.
   c. In Salesforce Tabs + Visualforce sites, add the Knowledge tab to the available tabs in the site.
4. In Aura sites, enable thumbs-up and thumbs-down voting on articles so you can identify helpful articles and ones that need improvement.
   a. In Experience Builder, navigate to the Article Detail page.
   b. To view and Article Content component's properties, click it.
   c. In the property editor, select **Allow voting on articles**.
   d. Publish your changes.

Hide Fields in Lightning Knowledge Search Results

When you display Knowledge search results in a grid layout, you can adjust the Knowledge search layout for different user profiles. Use this capability to hide some of the information that's returned in results from different user profiles.

SEE ALSO:

Salesforce Knowledge

Build Your Knowledge Base in Salesforce Classic

Automatically Assign Topics to Articles

Hide Fields in Lightning Knowledge Search Results

When you display Knowledge search results in a grid layout, you can adjust the Knowledge search layout for different user profiles. Use this capability to hide some of the information that's returned in results from different user profiles.

To use this feature, Salesforce Knowledge must be enabled in your org.

1. Open your site's Administration Workspace.
2. Go to **Preferences** > **General**, and select the **Use a profile-based layout for Lightning Knowledge search results** checkbox.
3. Click **Save**.
4. In Salesforce Setup, go to Object Manager, and click **Knowledge**.
5. Click **Search Layouts**.
6. Click a user profile, and remove the information that you want to hide.

   Repeat step 6 for each user profile that you want to change.

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Site Case Feed

With the site case feed, agents and Experience Cloud site members see the lifecycle of a case from start to finish. All case interactions appear in a unified, chronological Chatter case feed. Site members benefit from the added functionalities of Chatter, while service features help agents provide efficient, personalized support.

The site case feed gives Experience Cloud site users an intuitive environment where they can manage their cases. Internal and external users see the following interactions in the site case feed:

- Chatter text, file, and link posts
- Questions in Chatter that are associated with the case
- Case emails
  - In sites built on Aura, emails in the site case feed don't display inline images or clickable links.
  - To learn more about case email visibility, see Emails in the Site Case Feed.
- Read-only social posts on cases if your Salesforce admin enables them

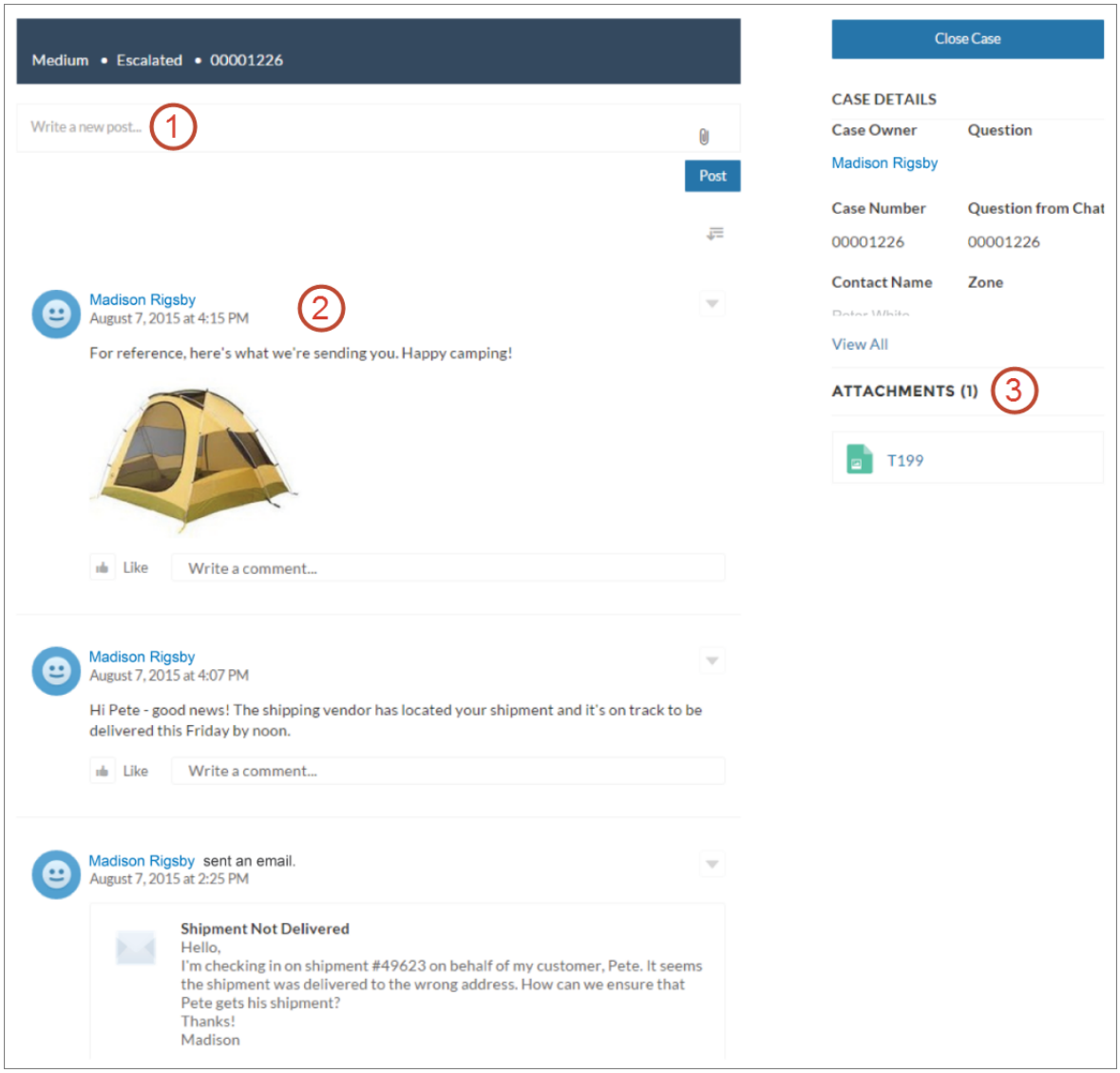
Site case feed in an Experience Cloud site built on the Customer Service template:

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites



Using the publisher (1), users create posts and attach files to the case. The feed (2) comes fully equipped with Chatter's collaboration tools: users can bookmark, like, and comment on posts, and mention other users. Images and comments appear inline, making it easy to scan the feed for details. The Attachments component (3) displays all case attachments.

When the site case feed is enabled, support agents can:

- Use the action in the console case feed to answer questions and create private and public Chatter posts on cases
- Expose or hide a published post or email in the site case feed of external users

Set Up the Site Case Feed

The site case feed lets Aura and Salesforce Tabs + Visualforce site users and support agents see all case interactions in a unified feed. Also, agents can take more actions directly from the console. To set up the site case feed, enable it in your org and make sure that the case page in your site is properly configured.

Emails in the Site Case Feed

When you enable the site case feed for Aura and Salesforce Tabs + Visualforce, external users with access to a case see case emails in their feed. Emails in the site case feed include the email's author, recipients, text, and time sent.

SEE ALSO:

Site Case Feed Considerations

Set Up the Site Case Feed

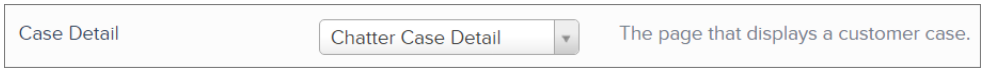
Expose or Hide a Published Post or Email in the Site Case Feed

Post on Cases and Experience Cloud Site Questions with the Experience Action in the Case Feed

Set Up the Site Case Feed

The site case feed lets Aura and Salesforce Tabs + Visualforce site users and support agents see all case interactions in a unified feed. Also, agents can take more actions directly from the console. To set up the site case feed, enable it in your org and make sure that the case page in your site is properly configured.

1. Enable the site case feed:
   a. From Setup, enter `Support Settings` in the Quick Find box, then select **Support Settings**.
   b. Select **Enable Site Case Feed**.
   c. Optionally, select **Enable Email Notifications for Case Posts** (recommended).
   d. Click **Save**.
2. If your site was built using Salesforce Tabs + Visualforce, make sure that your case page includes a Chatter feed.
3. If your site uses an Aura template, confirm that your active case detail page supports the site case feed:
   a. In Experience Builder, click .
   b. Click **Page Management**.
   c. Find Case Detail in the Name column, and make sure the active page assigned to it's either Chatter Case Detail (the default) or Record Detail.



If you change the active case detail page, publish your change.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

USER PERMISSIONS

To enable the site case feed:

- Customize Application
- Compact case feed enabled in your org

Site Case Feed Considerations

Consider the following if the site case feed is enabled.

- Agents can use the action in the console case feed to answer questions and create private and public Chatter posts on cases.
- Agents can expose or hide published Chatter posts and emails in the case feed of external site users.
- External site users with access to a case see associated Chatter posts, questions, and emails in their case feed.

If email notifications for case posts are enabled

- When someone makes an externally visible post on a case and the **Visible in Self-Service Portal** setting is selected on the case, all case contacts that are also site members are notified by email. They can comment on the post by replying to the email.
- If you're already using custom email notification settings, such as those triggered by workflows, selecting this preference can create duplicate email notifications.
- In sites built on Aura or Salesforce Tabs + Visualforce, you can turn off these notifications. In your email notification settings, deselect **Posts on one of my cases** under "Email me when someone...".

SEE ALSO:

Emails in the Site Case Feed

Expose or Hide a Published Post or Email in the Site Case Feed

Set Up the Site Case Feed

Emails in the Site Case Feed

When you enable the site case feed for Aura and Salesforce Tabs + Visualforce, external users with access to a case see case emails in their feed. Emails in the site case feed include the email's author, recipients, text, and time sent.

By default, if the case contact sends or receives a case email, that email appears in the feed of all users—both internal and external—with access to the case. For an external user to view the case, their profile must include access to cases in the site.

For example, suppose Rita, an external user, posts a question. The question remains unresolved, and a moderator creates a case from it using the Question-to-Case action. If the support agent assigned to the case emails Rita from the email publisher, Rita and all other users with access to the case see the email in their case feed. Users with access to a case typically include the assigned support agent and the case contact.

If the site case feed is enabled, you can write an Apex trigger or process to hide or expose all case emails in the feeds of external site users. The `IsExternallyVisible` field of the EmailMessage object controls the visibility of email messages in the site case feed. When the field is set to `true` emails sent or received by the case contact are visible to external users with access to the case.

Example: The following trigger exposes all case emails in the feeds of external users with access to the case. This means that case emails between internal users are also visible to external users with access to the case (for example, if the assigned support agent used the email publisher to email their shipping vendor). To *hide* all case emails from external users' case feeds, simply change `true` to `false`:

```
trigger makepublic on EmailMessage (before Insert) {
for(EmailMessage oe:trigger.new){
oe.IsExternallyVisible=true;
}

}
```

SEE ALSO:

Expose or Hide a Published Post or Email in the Site Case Feed

Expose or Hide a Published Post or Email in the Site Case Feed

When necessary, support agents can expose or hide individual case emails and published Chatter posts in the case feed of Aura and Salesforce Tabs + Visualforce site users.

To change the external visibility of a published Chatter post or email on a case:

1. Navigate to the post or email in the compact case feed.
2. In the post or email's dropdown menu:
   - Select **Make Public** to expose an internal Chatter post or email in the case feed of external users with access to the case

     The case contact and any other external users with access to the case now see the post or email in their case feed. An agent might choose to make an email or post in the site case feed public in order to keep the case contact updated about internal progress on the case.
   - Select **Make Private** to remove a Chatter post or email from the case feed of external users with access to the case

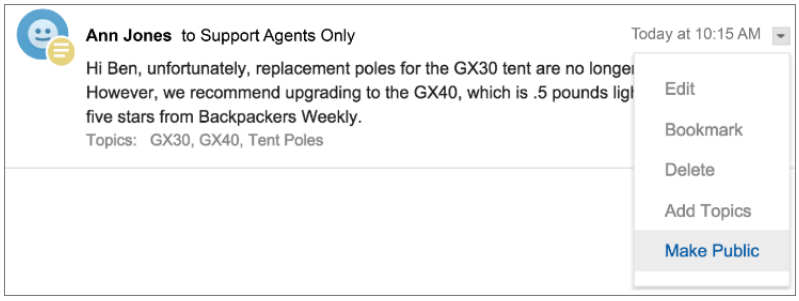
     The case contact and any other external users with access to the case no longer see the post or email in their case feed. (It still appears in the feeds of internal users with access to the case.) An agent can choose to make an email or post in the site case feed private if they want to hide their correspondence with the case contact from the case feed of other external users with access to the case. Keep in mind that when you make an email private, the email recipients already received the email. Similarly, when you make a Chatter post private, external users with access to the case may have been notified by email when it was first posted.

USER PERMISSIONS

To edit the external visibility of a published Chatter post or email on a case:

- Edit My Own Posts
- Edit Posts on Records I Own
- Compact case feed enabled in your org
- Site case feed enabled in your org

Example: **Make Public** option on a case Chatter post:



Make Public option on a case email:

The agent who owns the case and those above them in the hierarchy see the **Make Public** and **Make Private** options on all case emails and Chatter posts on the case. Internal users who don't own the case also see these options on case posts or emails that they wrote.

SEE ALSO:

Site Case Feed

Question-to-Case

Question-to-Case lets moderators create cases from questions in Chatter, which makes it easier to track and resolve your customers' issues. Question-to-Case is available in your Salesforce org and Salesforce mobile web, as well as in Aura and Salesforce Tabs + Visualforce sites where Chatter Questions is enabled.

When a customer uses the Question action in Chatter to ask a question, similar questions and Knowledge articles appear below the Chatter publisher. If the similar questions and articles don't address the issue, the customer posts the question.

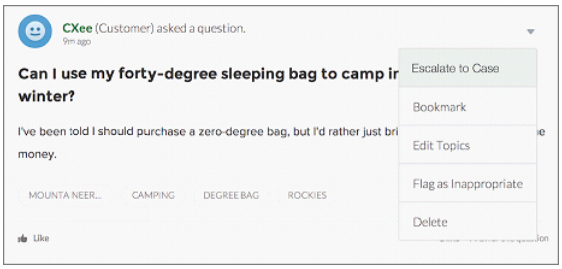
If a question isn't resolved, you can escalate the question to a case. Users with the Moderate Chatter or Moderate Experiences Feeds user permission can create cases from questions directly in the feed, or you can set up flows in Flow Builder to automatically create cases from questions that meet specified criteria. Cases from questions are added to a queue so support agents can claim them.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

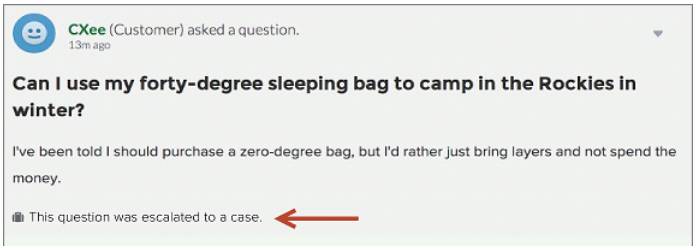
Applies to: Aura and Visualforce sites



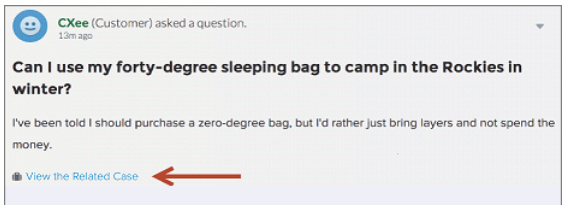
When a customer's question is turned into a case, the customer receives an email with the case number and a link to the case. The customer can view the case via a link on the question that's visible only to them, while moderators see a note on the question indicating that a case was created.

Note: The person who asked the question must have access to cases so they can view their case.

Moderator Flag

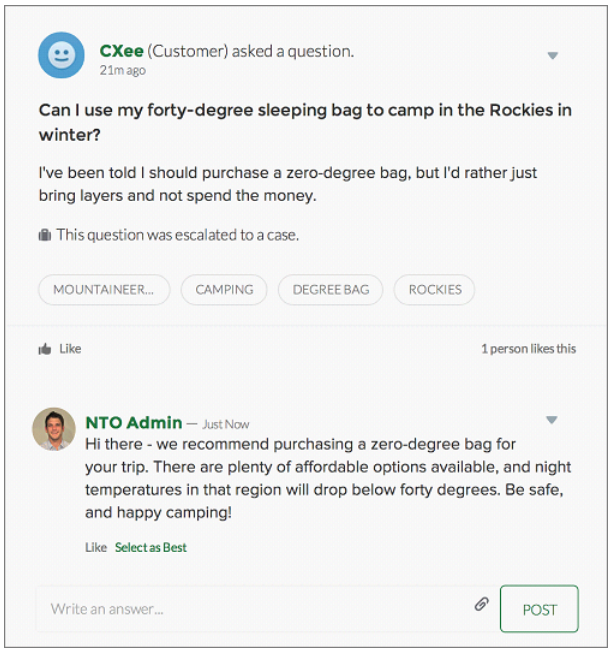


Customer Flag



Note: On escalated questions in Salesforce (as opposed to Experience Cloud sites), the notification is visible to all users, not just moderators.

When agents find a solution, they can respond to questions directly from the console, and the customer sees the agent's response on the question or in the My Cases view. Agents choose whether the reply is visible to the Experience Cloud site, or only to the customer who asked the question.



Enable Question-to-Case

Enable Question-to-Case in your Experience Cloud sites, Salesforce org, or both.

Enable Question-to-Case

Enable Question-to-Case in your Experience Cloud sites, Salesforce org, or both.

1. From Setup, enter `Support Settings` in the `Quick Find` box, then select **Support Settings**.
2. To enable Question-to-Case in Aura and Salesforce Tabs + Visualforce sites where you have enabled Chatter Questions, select **Enable Question-to-Case in Experience Cloud Sites**.
3. To enable Question-to-Case in your Salesforce org, select **Enable Question-to-Case in Salesforce**.
4. Click **Save**.

- Question-to-Case isn't available in sites using Lightning Web Runtime (LWR) or Help Center templates.
- Case assignment rules aren't supported in Question-to-Case. By default, cases created from questions are assigned to the moderator who escalates the question. You can write a workflow rule that automatically adds cases that were created from questions to a queue so agents can claim them.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

EDITIONS

USER PERMISSIONS

To enable Question-to-Case:
- Customize Application

Add the Question from Chatter Field to the Case Detail View

When a case is created from a question in Chatter, the `Question from Chatter` field on case detail pages displays a link to the original question. This field helps agents quickly navigate to the feed.

First, use field-level security to specify which users can see the `Question from Chatter` field on case detail pages.

1. From the object management settings for cases, go to Fields.
2. Click **Question from Chatter**.
3. Click **Set Field-Level Security**.
4. Select **Visible** for any profile that you want to be able to use Question-to-Case.
5. Click **Save**.

After you make the field visible to users, you can choose to add it to the Case Details view.

1. From the object management settings for cases, go to Page Layouts.
2. Click **Edit** next to the page layout that you want to customize.
3. Drag the `Question from Chatter` field from the Fields section of the page layout editor palette to the Case Information section of the page.
4. Click **Save**.

USER PERMISSIONS

To set field-level security:
- Manage Profiles and Permission Sets

  AND

  Customize Application

To customize page layouts
- Customize Application

5. Click **Page Layout Assignment** to confirm that the user profiles, which need Question-to-Case are assigned to the page layout that you customized. In addition, assign internal users who need access to the `Question from Chatter` field on cases to that page layout.

SEE ALSO:

Find Object Management Settings

Add the Escalate to Case Action to the Feed Item Layout and Confirm Access

Give moderators the ability to create cases from questions by adding the Escalate to Case action to Chatter Questions pages. This action is created automatically when Question-to-Case is enabled in your organization. Make sure that the profiles that need Question-to-Case have access to the record type associated with the Escalate to Case action.

1. From Setup, enter *`Feed Item`* in the `Quick Find` box, then select **Feed Item Layouts**.
2. Click **Edit** next to Feed Item Layout.
3. Drag the Escalate to Case action from the Quick Actions category in the palette to the Quick Actions in the Salesforce Classic Publisher section.
4. Click **Save**.
5. Click **Page Layout Assignments** to confirm that the user profiles that need Question-to-Case are assigned to the Feed Item Layout.

Check which record type is assigned to the profiles that need access to the Escalate to Case action.

1. From Setup, enter *`Profiles`* in the `Quick Find` box, then select **Profiles**.
2. Click the name of a profile.
3. In the Record Type Settings section, make a note of which case record types the profile uses.
4. In the Permissions section, make sure that the user profile has either the **Moderate Chatter** or **Moderate Experiences Feeds** permission enabled.

Then, check which record type the Escalate to Case action uses, and change it if necessary.

1. From Setup, enter *`Actions`* in the `Quick Find` box, then select **Feed Item Actions**.
2. Click **Edit** next to the Escalate to Case action.
3. Confirm that the `Record Type` field shows a record type that's assigned to the profiles that need access to this action. If it doesn't, select an appropriate record type from the drop-down list.
4. Click **Save**.

Create a Case from a Question in Chatter

If a question in Chatter hasn't been resolved, moderators can create a case from the question. Question-to-Case must be enabled in your org.

1. Navigate to the question in the feed.
2. Select **Escalate to Case** in the action dropdown menu.

USER PERMISSIONS

To create a case from a question in Salesforce:

- Moderate Chatter OR Modify All Data

  AND

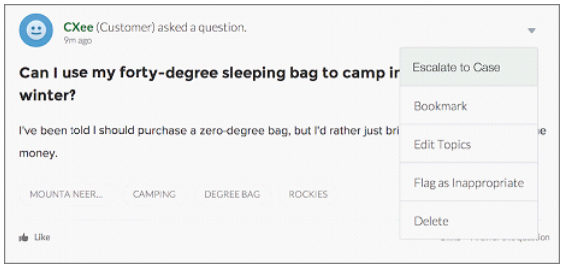
  Create on cases

To create a case from a question in an Experience Cloud site:

- Moderate Chatter OR Modify All Data OR Moderate Experiences Feeds

  AND

  Create on cases



A window appears that's pre-populated with the case subject, contact, and description. Unless Question-to-Case has a queue associated with it, the case is automatically assigned to you.

3. If needed, edit the case details.
4. Create the case.

After a case is created from a Chatter question, the customer who asked the question receives an email notifying them that a case was created from their question. The email provides the case number and a link to the case.

Agents can respond to the question directly from the case feed using the action in the publisher. Agents choose who can view the response by selecting either "Customer Only" or "Everyone". They can also navigate to the original question from the case's detail page by clicking the link in the `Question from Chatter` field.

Note: You can also create a flow to automatically create a case from unresolved questions. Flows related to Question-to-Case act on the Feed Item object and evaluate whether question posts meet your escalation criteria. You can create flow variables based on several Feed Item fields, including:

- `BestCommentId`: The ID of the comment that was selected as the best answer. If no comment has been selected as the best answer, this field is null.
- `CommentCount`: The number of comments on a question.
- `LikeCount`: The number of likes on a question.

Other things to consider:

- Each flow variable's data type must match the feed item field's data type. `CommentCount` and `LikeCount` are number fields, while `BestCommentId` is a text field.
- The creation of a feed item can trigger a flow, but updates to feed items (such as likes and comments) can't. Depending on your use case, you might need to specify how much time must pass before a related flow runs.

Restrict Experience Cloud Site User Access to Cases

Determine whether users with Customer Community Plus licenses can view and edit cases in which they're listed as the contact. You can disable the standard sharing behavior that grants the assigned contact and everyone in their role hierarchy access to a case. After disabling this sharing behavior, you can control access to cases by creating a manual share or by using Apex managed sharing.

For example, Acme has offices around the world, and it wants to keep its cases private within each office location. By disabling the standard sharing behavior, Experience Cloud site users who transfer from one of Acme's locations to another can no longer bring their assigned cases with them.

1. From Setup, enter *`Sharing Settings`* in the Quick Find box, and then select **Sharing Settings**.
2. In the Other Settings section, deselect **Grant site users access to related cases**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Sales Cloud Features

Enable Sales Cloud features so that your partners can sell products quickly using partner relationship management (PRM) sites in Experience Cloud. Some objects and features, like Commerce Cloud, require add-on licenses.

For more information on how to use PRM in Experience Cloud, check out Manage Partner Relationships with Experience Cloud Sites.

Send Emails to Leads and Contacts from an Experience Cloud Site

Enable the Send Email button, so partner and customer users can send emails to leads and contacts from their Aura or Salesforce Tabs + Visualforce site.

Set Up Approvals for External Users in Your Experience Cloud Site

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including who to request approval from and what to do at each point of the process. Customer Community Plus and Partner users in your Experience Cloud site can be assigned as approvers on records or added directly to queues. They can see and take action through the My Approvals and Approval History related lists on the record. Approvals can also be triggered directly from the site's feed.

Send Emails to Leads and Contacts from an Experience Cloud Site

Enable the Send Email button, so partner and customer users can send emails to leads and contacts from their Aura or Salesforce Tabs + Visualforce site.

1. Click **Edit** next to the Partner or Customer user profile.
2. Scroll down to General User Permissions and select **Send Email**.
3. Save your changes.
4. From Object Manager, enter `Contact` in the Quick Find box. Select **Contacts** > **Page Layouts** > **Contact Page Layouts**.
5. Add the Activity History related list to the page layout.
6. Add the Email action to Salesforce Mobile and Lightning Experience Actions.
7. Save your changes.
8. Repeat steps 4–7 for Leads.
9. To enable partner or customer site users to send emails to groups of leads, contacts, or campaign members, click **Edit** next to their user profile.

   Note: Users with Customer Community licenses can't send emails.

10. Select **Send Email**, **Mass Email**, and **Allow sending of List Emails**, from General User Permissions.
11. Repeat steps 4–7.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets

Set Up Approvals for External Users in Your Experience Cloud Site

An approval process automates how records are approved in Salesforce. An approval process specifies each step of approval, including who to request approval from and what to do at each point of the process. Customer Community Plus and Partner users in your Experience Cloud site can be assigned as approvers on records or added directly to queues. They can see and take action through the My Approvals and Approval History related lists on the record. Approvals can also be triggered directly from the site's feed.

Note:
- Users with high-volume licenses, such as High Volume Customer Portal and Authenticated Website, can't approve records.
- External users with legacy portal licenses can approve records in the Experience Cloud site, but not in legacy portals created before 2013.
- Email draft approval processes aren't supported in Experience Cloud sites.

When setting up approvals or queues, use the lookup fields to find customer and partner users.

For example, when setting up an approval, if you want to automatically assign a customer user as an approver use the lookup list to find and specify the user.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

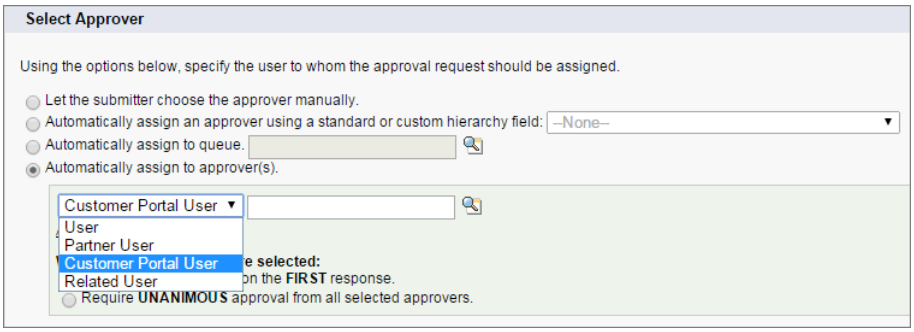
USER PERMISSIONS

To create, edit, delete, or clone approval processes:
- Customize Application

To create or change queues:
- Customize Application

  AND

  Manage Public List Views



If you set up email notifications for your approval workflows, emails are sent based on-site membership. If the user is a member of multiple active sites, the email comes from the oldest active one. Any links included in the email point users directly to the approval within the site.

In the Salesforce mobile app, users can see and act from the Approval History related list, but they can't submit requests for approval. To submit requests for approvals, the user must do so from the full Salesforce site.

SEE ALSO:

Set Up an Approval Process

Approval Limits

Create Queues

Collaboration Features

Enable collaboration features so users in your Experience Cloud sites can collaborate with one another and with employees in your org.

Chatter Features in Aura Sites

Chatter is a social network for holding and preserving discussions in a business, customer site, or other enterprise. Site members can use Chatter to engage with your organization, seek expert advice, and revisit relevant discussions. Chatter gives you a direct view into your site, fostering insight and inspiration, and lets you stay focused on your business and the things you want to get done. In sites, Chatter if often referred to as feeds or discussions. While Chatter is available in sites built using Aura and Salesforce Tabs + Visualforce templates, lots of extra features that support customer and partner site are available only in Aura sites.

Chatter Features in Aura and Visualforce Sites

Chatter is available in sites built using Aura and Salesforce Tabs + Visualforce templates. While many features that support customer and partner site are available only in Aura sites, some features are available in both types of templates. Chatter is enabled by default in orgs created after June 22, 2010.

Work with Files in Your Experience Cloud Site

Customize Salesforce Files settings and understand file sharing and visibility to get the most out of Files in your Experience Cloud site.

Enable Ideas in Your Experience Cloud Site

Ideas enable a group of users to post, vote for, and comment on ideas. Enabling Ideas provides an online, transparent way for you to attract, manage, and showcase innovation.

Chatter Features in Aura Sites

Chatter is a social network for holding and preserving discussions in a business, customer site, or other enterprise. Site members can use Chatter to engage with your organization, seek expert advice, and revisit relevant discussions. Chatter gives you a direct view into your site, fostering insight and inspiration, and lets you stay focused on your business and the things you want to get done. In sites, Chatter if often referred to as feeds or discussions. While Chatter is available in sites built using Aura and Salesforce Tabs + Visualforce templates, lots of extra features that support customer and partner site are available only in Aura sites.

For example, threaded discussions add dimension to your feeds by including the power to reply to answers and comments. Company verification puts your organization's stamp of approval on an answer to a customer question. Streams join multiple feeds together into one mega-feed. Direct messages create break-out sessions with a customer or partner needing individual attention. Chatter is enabled by default in orgs created after June 22, 2010.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

Close a Conversation, Poll, or Question in an Aura Site

The question is answered, the topic discussed, the poll decided. What do you do now? You end the conversation. Admins, moderators, and permitted members can close a question, poll, or post in an Aura site. And, if needed, they can reopen it. It's a nice way to stop the churning on a settled matter.

Pin Posts in an Aura Site

Pin a post to give more exposure to your most critical information. In your site's group and topics feeds, an authorized user can pin up to three posts to the top of the feed. A pinned post stays in place until an authorized user unpins it. Pinning a post is only available in Aura sites.

Add Groups to an Aura Site

Want more collaborative sites or communities? Give site members and guest users the ability to browse and join groups in your Aura site. Use the standard design for groups or create your own customized version of the group detail page using separate components.

Move Feed Items from One Public Group Feed to Another

In Aura, the **Move** option on feed item dropdown menus offers a way to relocate feed items from one public group feed to another. Use Move to improve an item's visibility or to place it in a more relevant context. For example, if a user posts a Sales poll in a Marketing feed by mistake, the poll can easily be moved to the right location. System Administrators, Community Managers, and Chatter Moderators can move posts, polls, and questions.

Threaded Discussions in an Aura Site

When you talk to people, it's rarely like a feed, where one person asks a question and everyone else answers. In real life, when one person asks a question, someone answers, and then there's a reply to that answer, and a reply to that reply. With threaded discussions, you can participate in this lively flow in your sites.

Chatter Streams in Aura Sites

Your Aura site members can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to figure out what people are saying. Each member can create up to 100 streams.

Enable Direct Messages in an Aura Site

Allow members to send direct messages to start a private conversation with up to 16 people, including the sender. Direct messages are supported in all Aura sites and in Lightning Bolt Solutions, such as the Lightning Partner Management solution.

Verify Answers for Your Company

Sometimes there's more than one correct answer to a question. Among the correct answers, your company can prefer one course for people to follow. You can highlight an answer that your company endorses by marking it as Company Verified. Questions marked as Company Verified or as Best Answer are copied to the top of the thread under a Top Rated Answers section.

SEE ALSO:

Enable Code Snippets and Assign Permissions to Use Them

Rename the Chatter Tab

Pin Posts in an Aura Site

Verify Answers for Your Company

Enable Upvotes and Downvotes

Add Rich Publisher Apps to Your Feeds

Close a Conversation, Poll, or Question in an Aura Site

The question is answered, the topic discussed, the poll decided. What do you do now? You end the conversation. Admins, moderators, and permitted members can close a question, poll, or post in an Aura site. And, if needed, they can reopen it. It's a nice way to stop the churning on a settled matter.

Closing conversations is available in group, topic, discussion, and user profile feeds in your Experience Builder sites. Admins and moderators can close posts, polls, and questions without any special configuration. Admins can assign the Close Conversation Threads permission to site members.

Note: When a conversation is exposed in your internal org, for example, through a cross-site stream, the conversation's open or close status is respected.

After a thread is closed, some actions are available to all and some actions are available only to admins and authorized members. This table outlines who can do what after a feed item is closed.

Action	Availability on a Closed Conversation
Add a comment	Blocked
Answer a question	Blocked
Vote on a poll	Blocked
Edit a feed item or its comments or answers	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads permission
Edit a topic	Available
Delete a feed item or its comments or answers	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads permission If a user has the Close Conversation Threads permission, they can delete feed items whether the conversation is open or closed.
Publish a pending review comment (site moderation)	Available to admins and moderators

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To assign close conversation permission to a user in a site:

- Enable Chatter

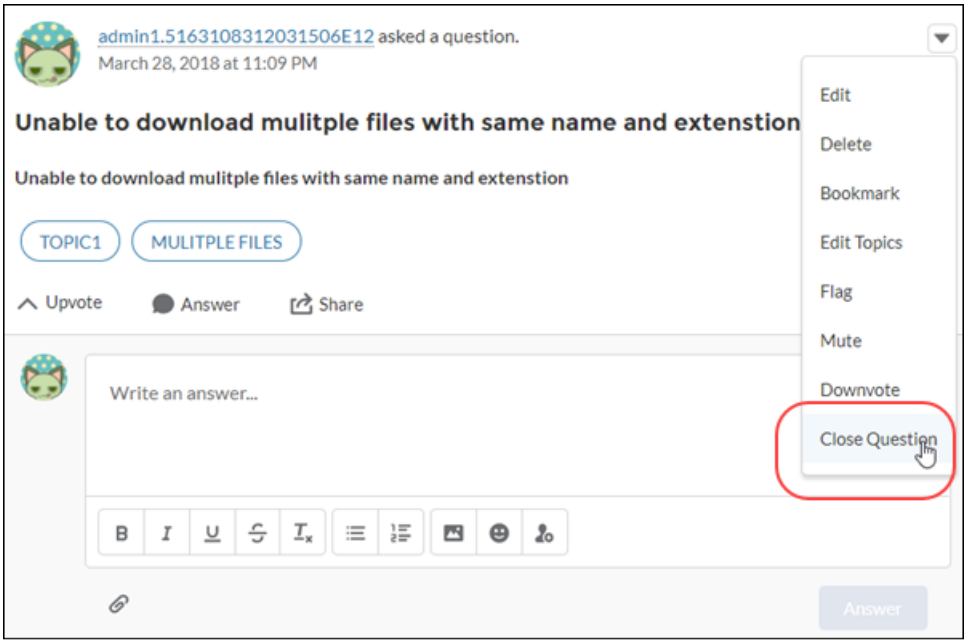
  AND

  Create and Set Up Experiences

To close a conversation, in a site:

- Close Conversation Threads

Action	Availability on a Closed Conversation
Like or unlike; upvote or downvote	Available
Select or remove a best answer	Blocked to author; available to admins, moderators, and people with the Close Conversation Threads permission
Company verify; remove verification	Available only to people with the Verify Answers to Chatter Questions permission
Flag	Available
Share	Available
Bookmark	Available
Mute and unmute	Available
Escalate to case	Available only to people permitted to escalate a feed item to a case



1. Go to the feed item, for example, a question, poll, or post, and open its overflow menu.
2. To close a question, select **Close Question**; to close a post, **Close Post**; to close a poll **Close Poll**.
   The feed item is closed to most new actions.

   Note: When a feed item is closed, the overflow menu shows open options, for example, **Open Question**, **Open Post**, and **Open Poll**.

Pin Posts in an Aura Site

Pin a post to give more exposure to your most critical information. In your site's group and topics feeds, an authorized user can pin up to three posts to the top of the feed. A pinned post stays in place until an authorized user unpins it. Pinning a post is only available in Aura sites.

When all permissions are in place, the **Pin** option appears on a feed item's overflow menu in your site's group and topics feeds. The **Pin** option doesn't appear on a feed item's overflow menu in the item's detail view.

To enable post pinning for your org, go to **Setup** > **Chatter Settings**, and select **Allow post pinning**. After post pinning is enabled, admins, community managers, and group owners and managers can pin posts. Admins can also assign the Pin Posts in Feeds permission to users through user profiles and permission sets.

When you pin a post, it appears twice in the feed: where it was posted and in its pinned position at the top of the feed. You can pin only the posts that were added directly to the feed. You can't pin posts that were added through an @mention.

Pinned posts are similar to announcements, with these differences.

- Announcements are available only to group feeds. Post pinning is available to group and topics feeds.
- Announcements follow a linear timeline: you post it, and you let it expire. Pinned posts are more flexible: you can pin posts from the past or the present.
- An announcement expires on a set date. A pinned post stays pinned until an authorized user unpins it.
- Only group owners and managers and users with the "Modify All Data" permission can post and delete group announcements. Admins can choose who is authorized to pin posts.
- You can post only one announcement per group feed. Authorized users can pin up to three posts to the top of a feed.
- You can add style to a pinned post with the rich text editor.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To assign post pinning permission to a user in a site:

- Enable Chatter

  AND

  Create and Set Up Experiences

To pin a post in a site:

- Create and Set Up Experiences

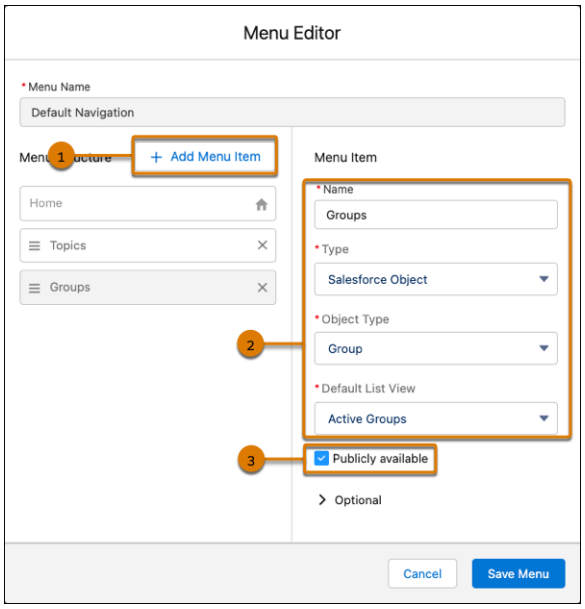
  OR

  Pin Posts in Feeds

Add Groups to an Aura Site

Want more collaborative sites or communities? Give site members and guest users the ability to browse and join groups in your Aura site. Use the standard design for groups or create your own customized version of the group detail page using separate components.

1. To enable groups in your site, add groups to the site's navigation menu. Go to **Settings** > **Navigation**.
2. In the dropdown, click **Edit** for the navigation menu that you want to customize.
3. Click **Add Menu Item** (1), and give your new menu item a name.
4. From the Type dropdown, select **Salesforce Object**. Then select **Group** for the Object Type and **Active Groups** for the Default List View (2).
5. Enable **Publicly available** (3) so guest users can browse through the list of active public groups.



6. Save your changes.
7. If you haven't already, customize the group publisher layout to include the Add Member action. With this action, group owners and managers can add members to the group, and isn't shown in the list of actions in the group by default.

Site visitors can access a new page in your site with a list of active groups using the navigation menu. When users click the name of an active group, they're redirected to the group detail page. If it's a private group, they're asked to log in. Only logged-in group members can view private group content.

Important: If you're adding Groups to an LWR site, you must create object pages for the Groups object. If you don't create the object pages, site visitors can't see the Groups when they click the menu item.

A few things to keep in mind:

- When you enable groups in your site, the default Group Detail page is used to display group data. This page uses the Group component under the hood for formatting and layout. The Group component is a composite, one-stop component that includes the group banner, group details, related lists, and the group feed. We recommend using this composite component, especially if you want your site pages to be responsive across desktop and mobile device browsers.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

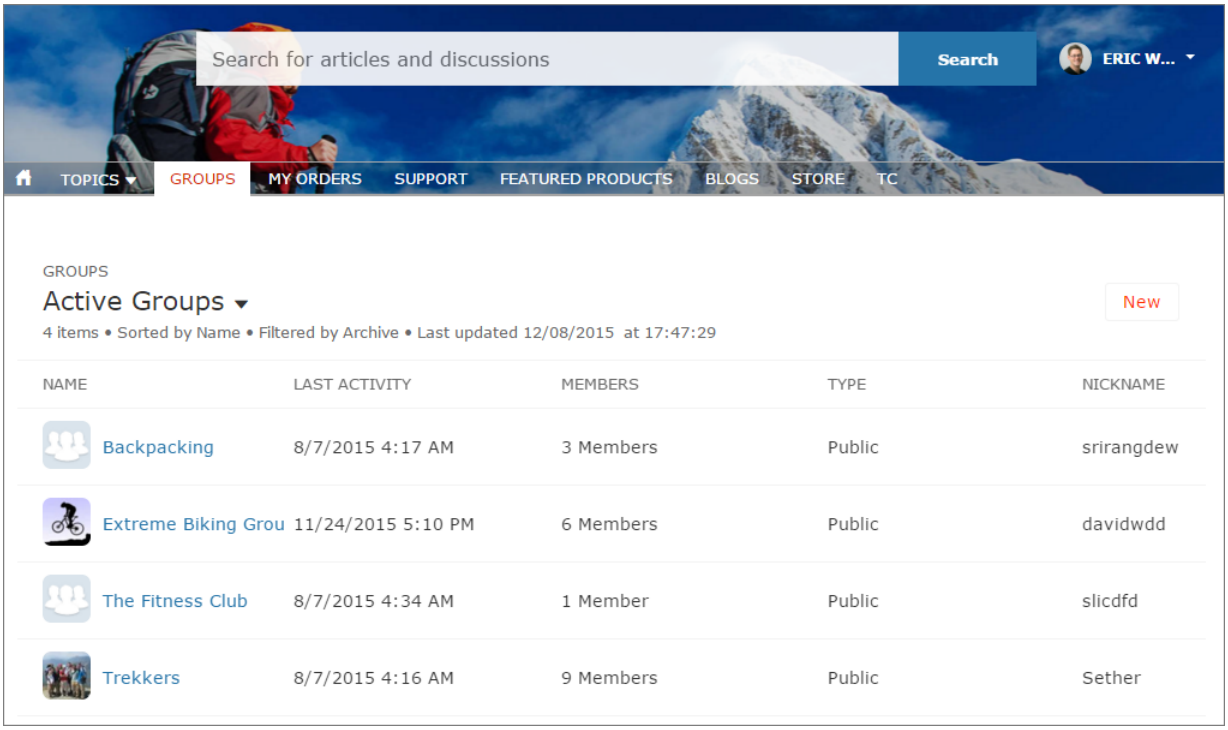
- Be a member of the site AND Create and Set Up Experiences

  OR

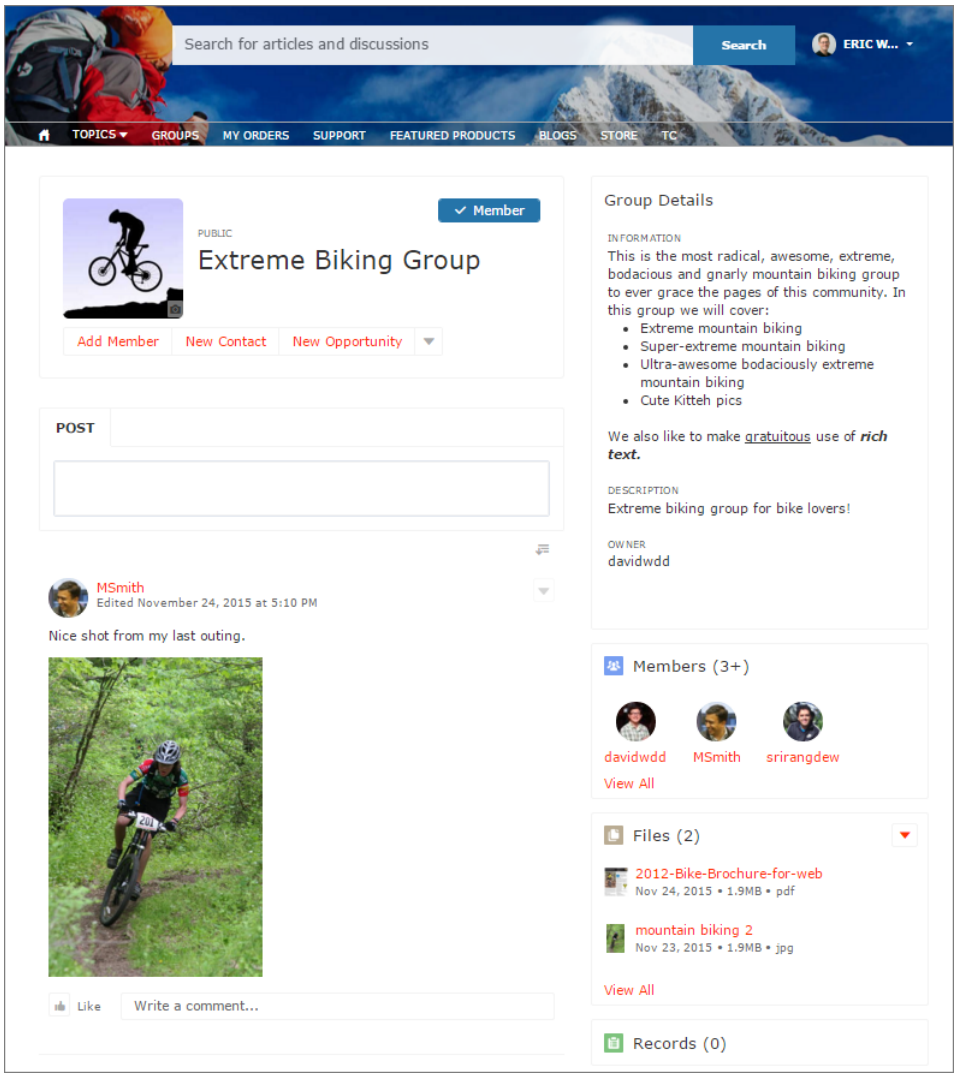
- Be a member of the site AND an experience admin or publisher in that site

- If you prefer to use a different layout or want more control over the placement of group content, create a custom page. Then use the Group Banner, Group Details, Group Related List, and Feed components. Depending on how you use the individual components, custom pages aren't always responsive across all devices.

Group list in the Customer Service Template



Group detail page in Customer Service Template


Search for articles and discussions
Search
ERIC W...
TOPICS
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MY ORDERS
SUPPORT
FEATURED PRODUCTS
BLOGS
STORE
TC
Member
PUBLIC
Extreme Biking Group
Add Member
New Contact
New Opportunity
POST
MSmith
Edited November 24, 2015 at 5:10 PM
Nice shot from my last outing.
Like
Write a comment...
Group Details
INFORMATION
This is the most radical, awesome, extreme, bodacious and gnarly mountain biking group to ever grace the pages of this community. In this group we will cover:
Extreme mountain biking
Super-extreme mountain biking
Ultra-awesome bodaciously extreme mountain biking
Cute Kitteh pics
We also like to make gratuitous use of rich text.
DESCRIPTION
Extreme biking group for bike lovers!
OWNER
davidwdd
Members (3+)
davidwdd
MSmith
srirangdew
View All
Files (2)
2012-Bike-Brochure-for-web
Nov 24, 2015 • 1.9MB • pdf
mountain biking 2
Nov 23, 2015 • 1.9MB • jpg
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Records (0)

Move Feed Items from One Public Group Feed to Another

In Aura, the **Move** option on feed item dropdown menus offers a way to relocate feed items from one public group feed to another. Use Move to improve an item's visibility or to place it in a more relevant context. For example, if a user posts a Sales poll in a Marketing feed by mistake, the poll can easily be moved to the right location. System Administrators, Community Managers, and Chatter Moderators can move posts, polls, and questions.

Note: You can't move feed items into or out of public, broadcast-only groups.

When you move an item:

- Mentions are preserved.
- Announcements become announcements in the target group.
- Things that are included in or attached to the feed item stay included or attached.

  For example, moved items bring their answers, comments, replies, topics, bookmarks, attachments, and other related entities with them. If an answer is marked as best, that status is preserved.

Note: To move a post that's pinned, unpin it first.

1. Open the dropdown menu on the feed item to be moved, and select **Move**.
2. In the Move Feed Item to Another Public Group dialog, search for the group to move the item to.
3. In the search results, select the target group, and then click **Move**.

The item, along with all of its related entities, is removed from the first public group and placed in the second.

Users receive notifications about the moved feed item according to their preferences. So, assuming people have opted in to the related notification setting:

- People who follow the target group are notified.
- When the person who moved the feed item is also a follower of the target group, they're notified.
- People who are mentioned in the moved feed item are notified about the mention.
- The moved item's author is not notified. The author isn't notified because, no matter their notification settings, a feed item's author isn't notified about their post actions.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To move feed items from one public group feed to another

- Is a System Administrator OR has the permission
- Moderate Experiences Feeds
- AND is a member of the Experience Cloud site

SEE ALSO:

Experience Cloud Site Moderation Strategies and Tools

Threaded Discussions in an Aura Site

When you talk to people, it's rarely like a feed, where one person asks a question and everyone else answers. In real life, when one person asks a question, someone answers, and then there's a reply to that answer, and a reply to that reply. With threaded discussions, you can participate in this lively flow in your sites.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

USER PERMISSIONS

To enable threaded discussions in a site:

- Enable Chatter

  AND

  Create and Set Up Experiences

To delete a discussion thread in a community:

- Modify All Data

  OR

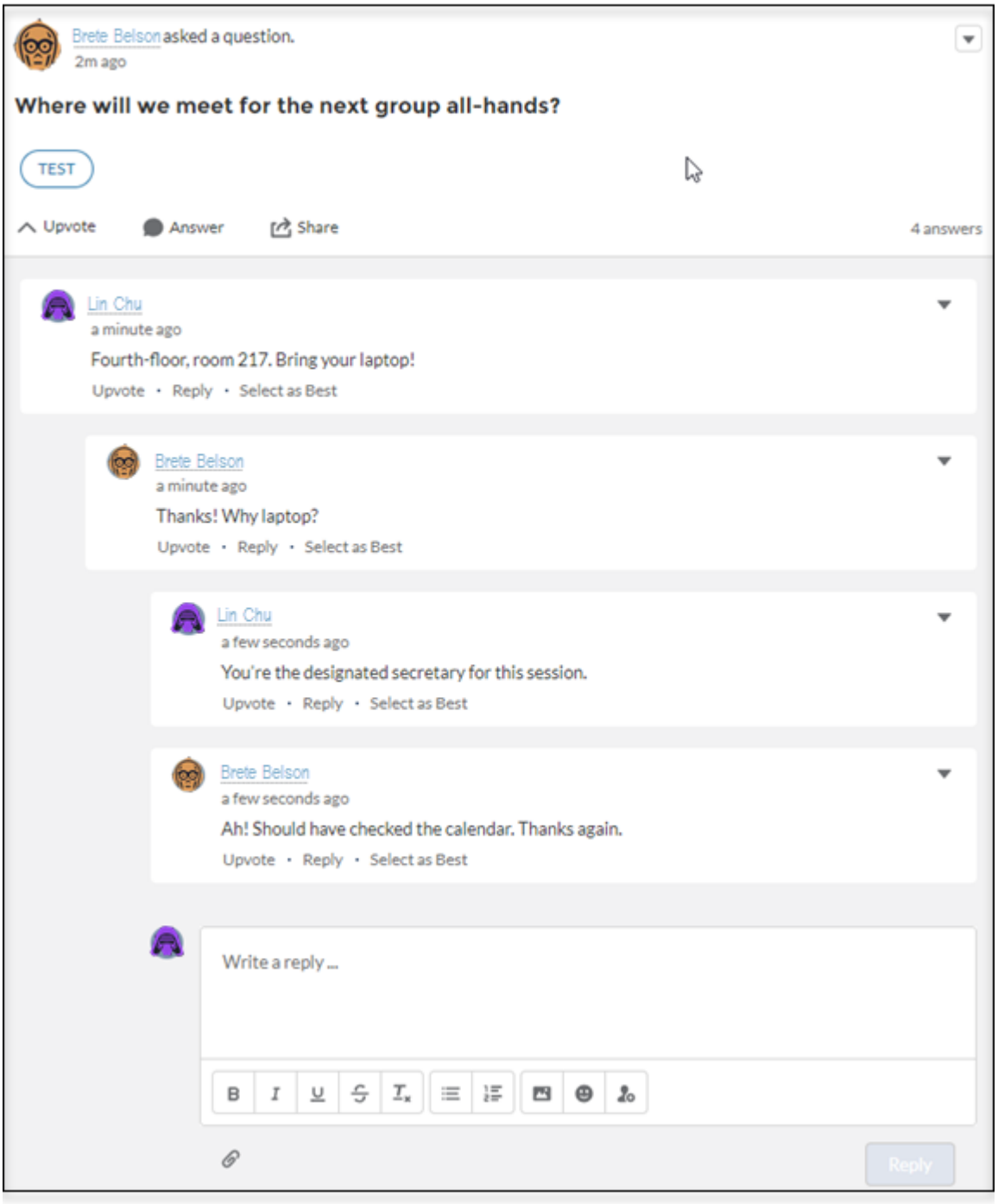
  Moderate Site Feeds

  OR

  Salesforce disabled block-delete at your org's request

  AND

  You're the author of the post, question, comment, or reply



A thread is any feed item that has one or more levels nested under it. For example, a question with an answer or a comment with a reply is a thread. When you enable threaded discussions in your site, all discussions convert to threaded discussions: Members can comment on a post, answer a question, and reply to those comments and answers. Discussions are indented up to three levels to clarify who is responding to what.

The notification emails you receive for threaded discussions link more deeply into the discussion. All notification links used to go to the top of the thread; now they land you on new thread content.

To prevent the loss of important content, in orgs created after Winter '19 most site members are blocked from deleting discussion threads.

For orgs created after Winter '19, blocking is the default behavior. Orgs that existed before Winter '19 can call Salesforce Customer Support to enable blocking. When blocking is enabled, only feed moderators and users with the Modify All Data permission can delete threads.

We recommend blocking deletions because, when deletion isn't blocked:

- A user who creates a feed item can delete any response nested under it.
- A user who deletes a feed item also deletes all responses nested under it.

If nothing is nested under a feed item, the author can always delete the item.

Enable Threaded Discussions

Enable a preference in the Administration Workspace to change all site discussions to threaded discussions. Threaded discussions add the Reply feature to feeds. In addition to commenting on a post or poll or answering a question, you can reply to an answer or a comment. Threaded discussions are indented up to three levels to clarify who is replying to what.

Enable threaded discussions in your site in the Administration Workspace.

1. Open Experience Workspaces for your site, and click the Administration Workspace.
2. Go to the Preferences page, and select **Allow discussion threads**.
3. Click **Save**.
   All discussions in your site convert to threaded discussions: In addition to comments and answers, members can reply to comments and answers. Discussions are indented up to three levels to clarify who is responding to what.

Delete a Discussion Thread

Deleting a discussion thread is the same as deleting any feed item with something nested under it. The thing to consider is whether deletion is blocked in your Experience Cloud site. To prevent loss of important content, orgs created after Winter '19 block most site members from deleting feed items that have something nested under it. For example, when a question has an answer, deletion of the question is blocked.

1. Open the actions menu on a feed item.
2. Select **Delete**, and then confirm the deletion.
   When delete isn't blocked, the feed item and everything nested under it are deleted. When delete is blocked, the item is deleted only under these conditions: The item has nothing nested under it and you are its author, or you have the right role or permission.

Chatter Streams in Aura Sites

Your Aura site members can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to figure out what people are saying. Each member can create up to 100 streams.

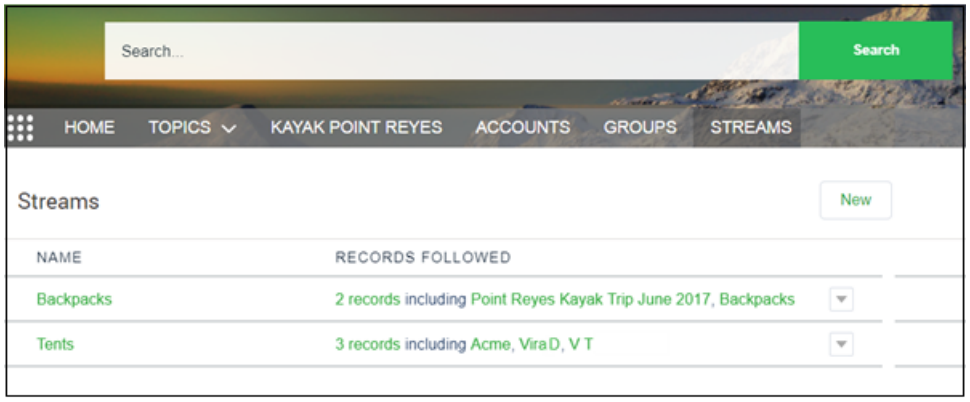
Note: Activity on a topic's feed in a stream doesn't trigger notifications.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

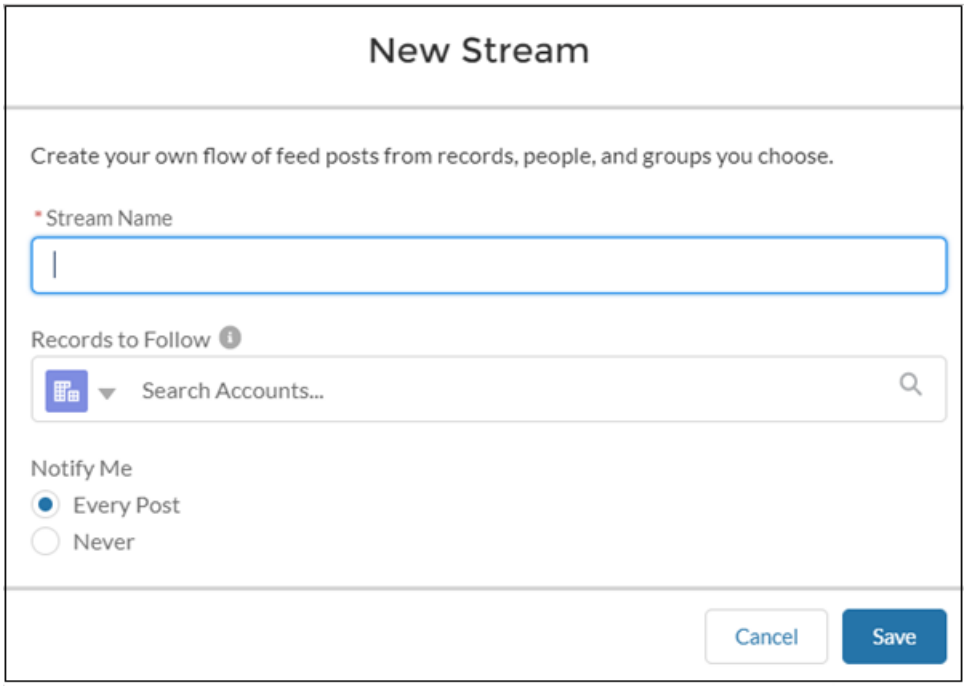


Each site member has their own view of the Streams page where they see their own streams. On the Streams page, members can create streams and use row actions menus to edit and delete their streams.

Add a Chatter Stream

Create and manage streams in your Aura site's Streams home page.

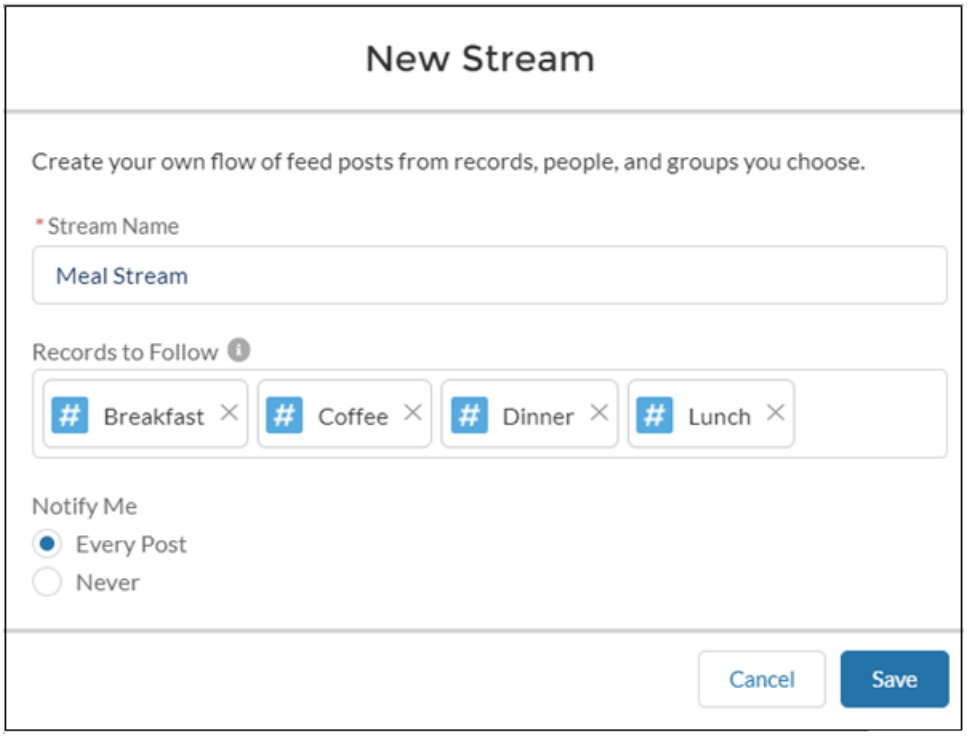
1. Open the Streams page, and click **New**.
2. In the New Stream dialog, enter a name for your stream.



3. Under **Records to Follow**, select a type of feed you want to add to this stream.

   Note: Knowledge articles (KAs) aren't fully supported in streams. You can add them when you create and edit a stream by searching for the article's ID number rather than its title. But you can't add a KA to a stream from its Follow button like you can with other record types. Articles added to Streams using the article's ID don't appear in Records to Follow on the Stream's edit page. KAs also don't appear when viewing the Follow button details on the article's detail page.

4. In the same field, enter the name of a feed you want to add.
5. In your search results, click the feed you want to add.
   Selected feeds appear below the **Records to Follow** field.

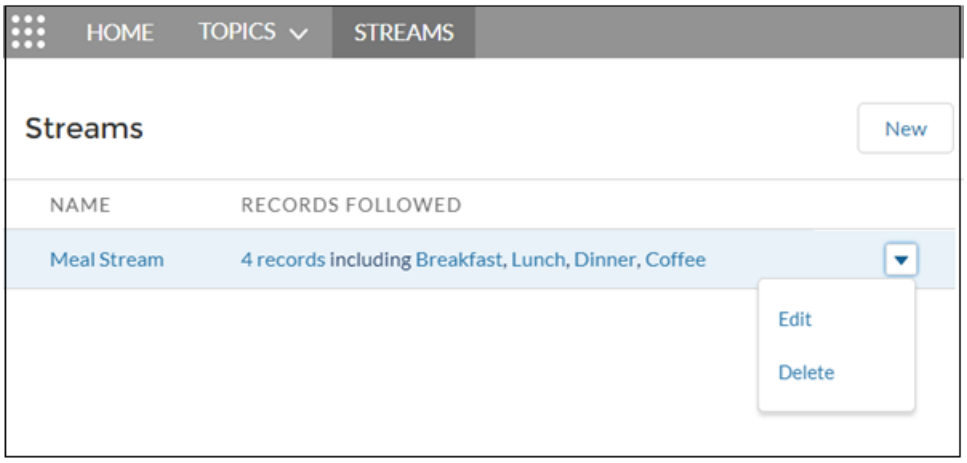


6. Under **Notify Me**, select a notification option.

   To receive an email notification whenever a new post appears in the stream, select **Every Post**. To turn off notifications for this stream, select **Never**. You can change this selection later in a stream's detail view.

7. Click **Save**.

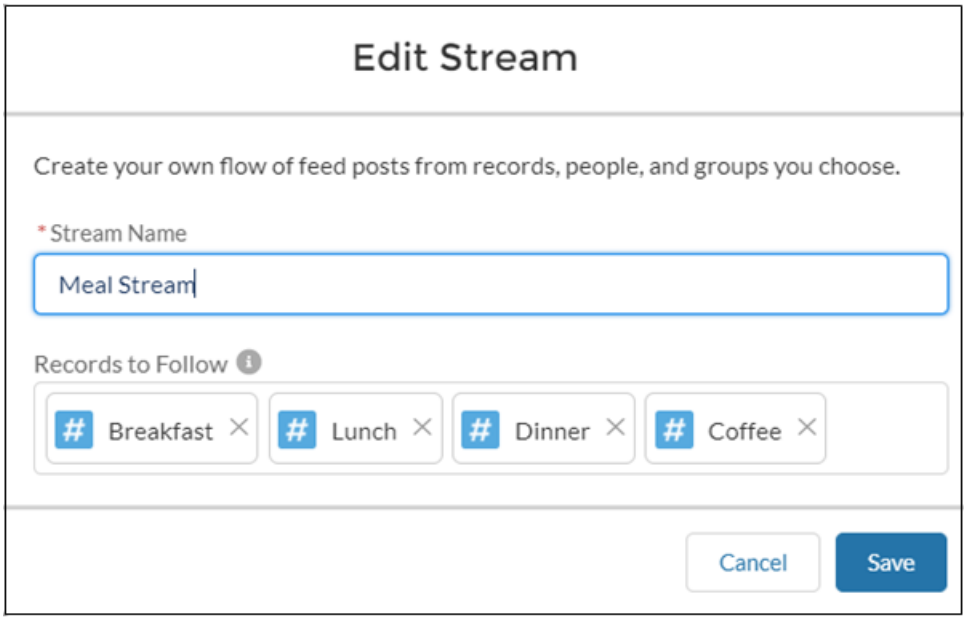
   Your new stream appears in a row on the Streams page. The row lists the number of feeds (records) that are included in the stream and the names of added feeds. Stream actions appear on the row actions menu at the end of the row. To open a stream, click its name.



Edit or Delete a Chatter Stream

Easily edit a stream or delete it from your list of streams in your Aura site. Deleting a stream doesn't delete the records or posts it contains. It deletes only the stream, which frees up space for you to create more streams.

1. Open the Streams page, and, from the row actions menu on the stream you want to remove, select **Edit** or **Delete**.
2. In the Edit Stream dialog, change the values you want to change. For example, rename the stream, delete a stream feed (record), add more feeds of a different type or the same type.



When you delete a record from a stream, the stream retains the posts from the deleted feed up to the point of deletion. Deleting a record stops the flow of new information from that feed into the stream.

3. Save your changes, or select **Delete**.

View Aura Site Streams from Your Internal Salesforce Org

Site members who have access to their internal Salesforce org can view their site streams from the org. When you click most site-based links from the internal org view, they lead right back to the site.

You can take many feed actions, like answer, comment, mention, and like, when you visit a site stream in your internal org. Here are some others.

- Upvote and downvote questions and answers, and see the impact in your site.
- Verify answers, and see the verification in your site.
- Click a link to a user profile, account, topic, or case, and jump to its home site.
- Add a topic, and it's added to your site.
- Click the timestamp on a post, and jump to the post detail view in its home site.
- Copy a link that leads to the item, person, or post detail view in its home site.
- Click a mention in a site stream, and go to its home site.

There's no special setup to get links working between your site and your internal org. However, features, such as upvote and downvote and mark as company verified, do require that you enable them for your site.

Note:

- You can't create a site stream from your internal Salesforce org. Create streams from your site.
- Some Chatter features that are available in a site aren't available when you visit a site stream from your internal org. For example, file attachments, inline images, post sharing, and hover cards aren't available when you view site streams internally.
- Site topics don't appear when you view a stream from your internal Salesforce org. However, you can add topics.

SEE ALSO:

Enable Upvotes and Downvotes

Verify Answers for Your Company

Enable Direct Messages in an Aura Site

Allow members to send direct messages to start a private conversation with up to 16 people, including the sender. Direct messages are supported in all Aura sites and in Lightning Bolt Solutions, such as the Lightning Partner Management solution.

Direct messages offer privacy for more sensitive conversations. Imagine a scenario where a customer brings up an issue they have with a product in the Experience Cloud site feed. A support agent can share that post and address the customer's concerns privately in a direct message. Similarly, a channel manager can discuss sensitive sales data with one or more partner users in a partner site.

Note: Private messages and direct messages are separate features. Direct messages are newer and offer a richer feature set for private communication. Direct messages are based on Chatter and offer a rich text editor that supports inline images and attachments. With direct messages, you can start a message right from a feed post.

USER PERMISSIONS

To enable direct messages:

- Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To enable Chatter:

- Customize Application

1. Make sure that Chatter is enabled in your org.
2. Open Experience Workspaces.
3. Under Administration, click **Preferences**.
4. Select **Enable direct messages** and save your changes.
5. In Experience Builder, click the **Profile Header** component on the Home page and select **Include My Messages**. The My Messages link appears in the user profile dropdown menu.
6. Publish your Experience cloud site.

To facilitate easy access to direct messages, add other components to your site.

- Add the **Messages** page to your site's navigation menu for prominent placement and easy access.
- Add the **New Message Button** component to any page you want to allow members to create messages from.
- Add the **Message Notification** component to the home page.

After enabling direct messages, members can start a direct message conversation:

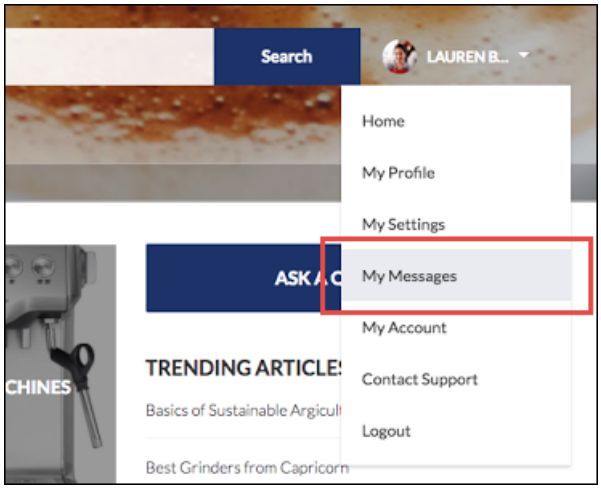
- From the Messages page.
- From user profiles and from hovers on users names.
- From the Message Notification and the New Message Button components on-site pages.
- By sharing a feed post as a direct message.

Members can flag messages that are spam or inappropriate. They can also opt to receive email notifications when someone sends them a direct message or responds to a conversation they're a part of. Members can access their direct message conversations by clicking **My Messages** in their user profile dropdown menu.

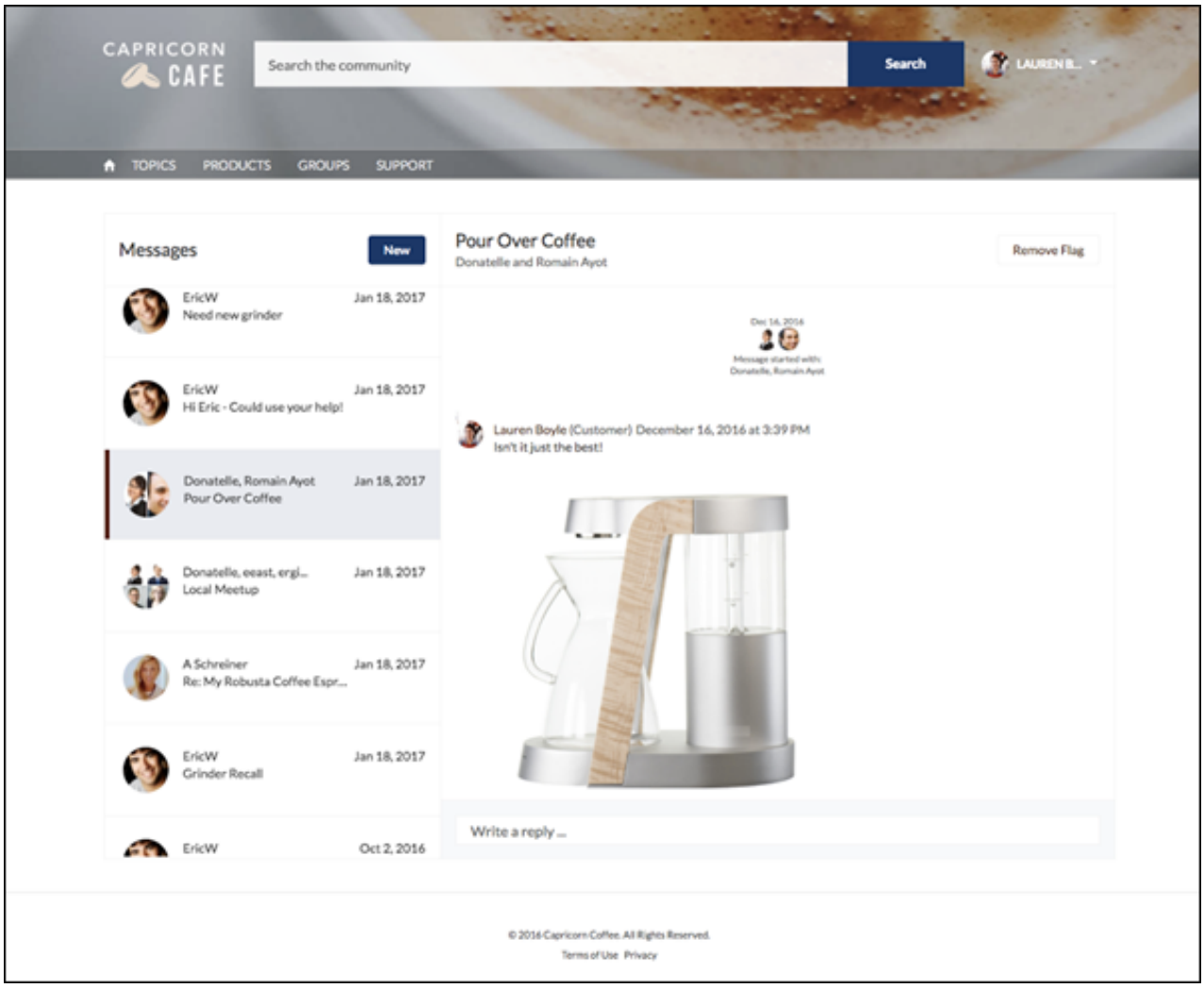
To allow members to flag messages that are inappropriate,

select the `Allow members to flag content` preference in the Administration tile of Experience Workspaces.

Note: The maximum number of people who can participate in a single direct message, including the sender, is 16. If people leave, you can add more people, up to a total of 16.



Here's what the messages list view looks like:



SEE ALSO:

Edit Pages and Components in Experience Builder

Flagged Direct Messages

Manage Your Site Email Notifications

Direct Message Limitations

Before you enable direct messages for your Aura site, review these considerations.

- Direct messages require that Chatter is enabled in your org.
- Direct messages can be enabled only in Experience Builder sites and in Lightning Bolt Solutions.
- Users with the View All Data and Modify All Data permissions can't access direct message data unless they're participants in the conversation.
- Only users with the Manage Chatter Messages and Direct Messages permission can view all the direct messages data in your org.
- The maximum number of people who can participate in a single direct message, including the sender, is 16. If people leave, you can add more people, up to a total of 16.

- To moderate flagged direct messages, the moderator needs the Moderate Chatter Messages and Direct Messages permission and the Moderate Experiences Chatter Messages permission.
- To maintain privacy, direct messages aren't included in search results.
- When members flag a direct message, the entire conversation is flagged. Individual messages can't be flagged.
- If you have private messages enabled, they remain available. However, direct messages are better integrated with Lightning technology. We recommend that you switch to direct messages.

For Developers

Direct messages are supported in Connect REST API. Under the hood, direct messages are a special implementation of feed posts and comments parented to a direct message entity. If you use Connect REST API to create a custom implementation of direct messages, a few things to keep in mind:

- The first message is stored as a feed post and the responses are stored as comments.
- Unlike other objects, direct messages can't have multiple feed posts associated with a single direct message conversation.
- You can't follow, like, share, mention people in, mute, and bookmark feed items associated with direct messages. You also can't associate topics with direct message feed items.
- Feeds associated with direct messages aren't accessible via search, public feeds, or streams.
- Email notifications for direct messages aren't supported for custom implementations built for the internal Salesforce org.
- Direct messages are only supported on the Messages page. Using direct messages on custom pages isn't supported and can lead to unexpected authentication results.
- In the Experience Cloud site UI, direct messages display only to the participants in the conversation. However, Apex code runs in system mode, which means that the permissions of the current user aren't considered. This limitation has implications for pages that use Apex and Visualforce.
  - Review your Visualforce pages for any potential exposure of direct message data.
  - Review your AppExchange apps that are written in Apex to ensure that direct message data isn't exposed.
  - Visualforce and Apex developers in your org might be able to access direct message data.

Use permission sets, profile-level permissions, and sharing checks in your code to limit user access.

SEE ALSO:

Enable Direct Messages in an Aura Site

Verify Answers for Your Company

Sometimes there's more than one correct answer to a question. Among the correct answers, your company can prefer one course for people to follow. You can highlight an answer that your company endorses by marking it as Company Verified. Questions marked as Company Verified or as Best Answer are copied to the top of the thread under a Top Rated Answers section.

To ensure that the best qualified site members speak for the company, community managers can give these users the Verify Answers to Chatter Questions permission through user profiles or permission sets. Users with this permission see the **Company Verify** option on the answer dropdown menu in feeds that they have access to.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To assign permission to verify answers in a site:

- Enable Chatter

  AND

  Create and Set Up Experiences

To verify answers in a site:

- Create and Set Up Experiences

  OR

  Verify Answers to Chatter Questions

Chatter Features in Aura and Visualforce Sites

Chatter is available in sites built using Aura and Salesforce Tabs + Visualforce templates. While many features that support customer and partner site are available only in Aura sites, some features are available in both types of templates. Chatter is enabled by default in orgs created after June 22, 2010.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

Add Rich Publisher Apps to Your Feeds

Customize the Chatter publisher with payloads that are unique to your business process. Add a form to a post; choose from a selection of branding images; add inspiration to your feed with profound quotations. Select from the custom apps your team creates or acquires from AppExchange. Add up to five apps to the Chatter publisher.

Enable Chatter Questions in Your Experience Cloud Site

Chatter Questions helps you promote engagement by giving users the ability to ask and answer questions in their Chatter feed, in groups, and in records. Members in your users' groups and Experience Cloud sites can answer questions in Chatter just as they would comment on a Chatter post. Users in sites built on the Customer Service template can also attach files to questions.

Data Model for Peer-to-Peer Conversations in Experience Cloud Sites

Experience Cloud uses Chatter behind the scenes for peer-to-peer conversations in Experience Cloud sites. To keep conversations in your internal org separate from the ones in an external-facing site, each Chatter post or conversation is tied to the Experience Cloud site that it belongs to. If you have more than one external-facing site, the same is true for conversations in each site—each one is tied to the site that it belongs to.

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Add Rich Publisher Apps to the Chatter publisher.

1. Go to **Experience Workspaces**.
2. Click **Administration** > **Rich Publisher Apps**.
3. Move apps between the Available Apps and Selected Apps lists.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

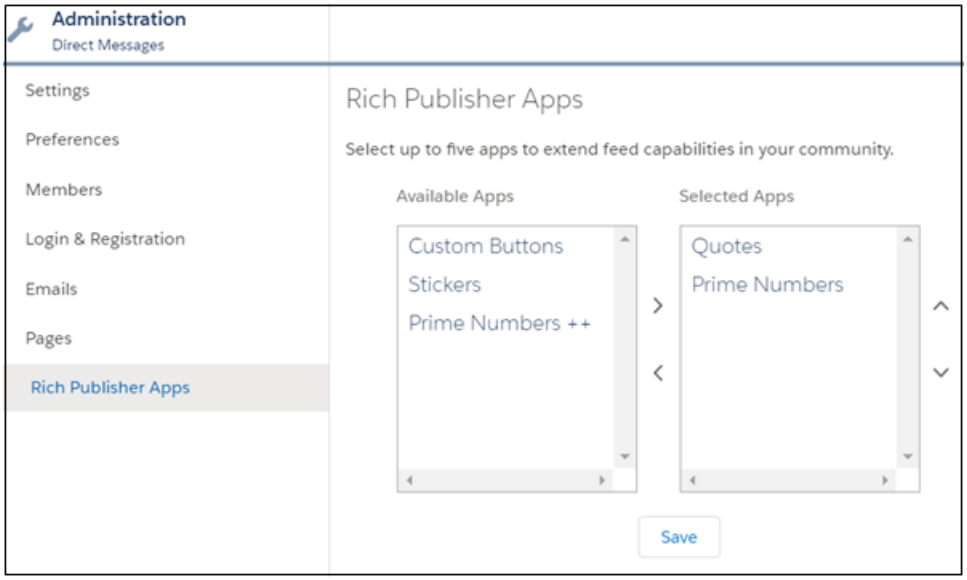
USER PERMISSIONS

To add Rich Publisher Apps to the Chatter publisher:

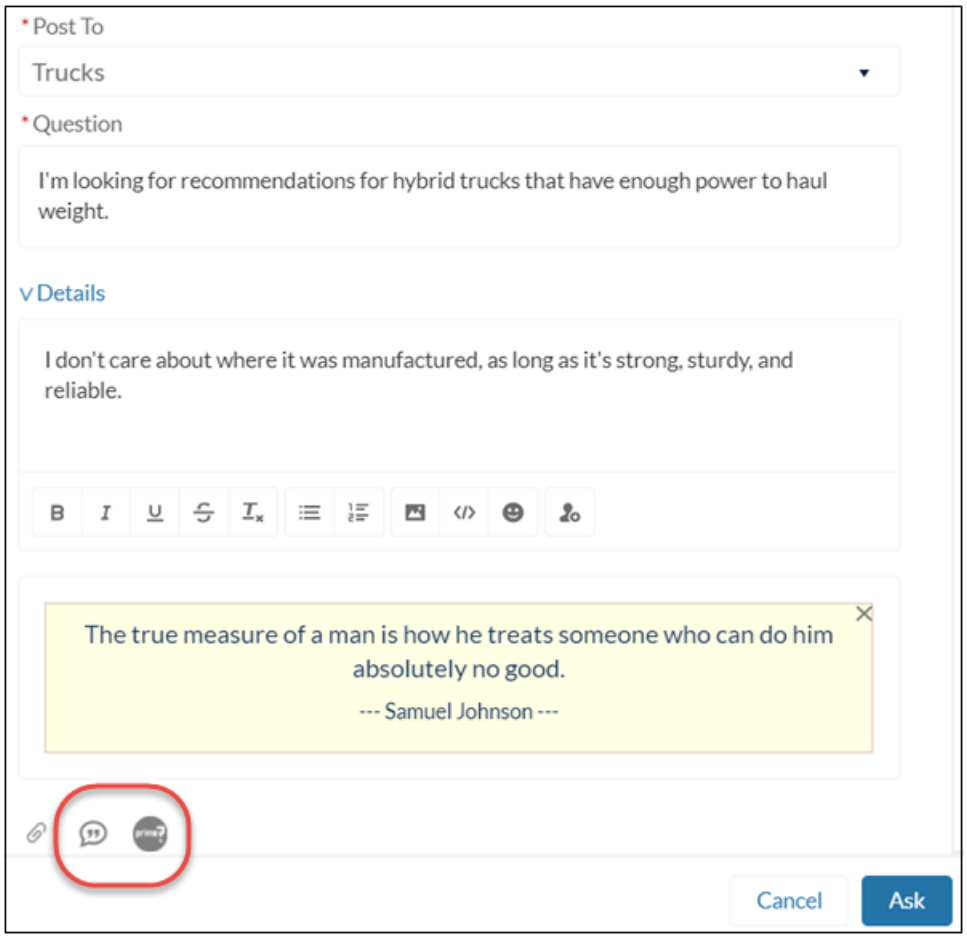
- Chatter Enabled

  AND

  Create and Set Up Experiences



4. Rearrange the Selected Apps list in the order you want the apps' icons to appear in the Chatter publisher.



Selected apps appear to the right of the Attach icon in the Chatter publisher. The apps appear in the order you arranged them in the Selected Apps column.

Enable Chatter Questions in Your Experience Cloud Site

Chatter Questions helps you promote engagement by giving users the ability to ask and answer questions in their Chatter feed, in groups, and in records. Members in your users' groups and Experience Cloud sites can answer questions in Chatter just as they would comment on a Chatter post. Users in sites built on the Customer Service template can also attach files to questions.

To set up Chatter Questions, add the Question action to the global publisher layout. In orgs created after Summer '14, the Question action is automatically added, but we recommend dragging it to the far left to increase its visibility.

EDITIONS

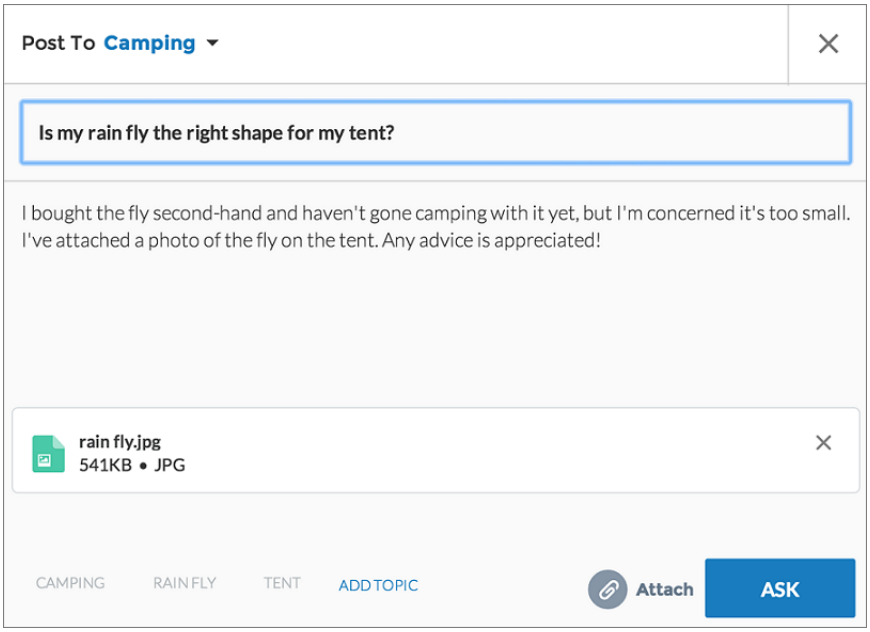
Available in: Salesforce Classic

Chatter Questions is available in: **Group**, **Professional**, **Developer**, **Performance**, **Enterprise**, and **Unlimited** Editions.

USER PERMISSIONS

To edit the global publisher layout:

- Customize Application



1. From Setup, enter `Publisher Layouts` in the `Quick Find` box, then select **Publisher Layouts**.
2. Click **Edit** next to the global publisher layout.
3. Drag the Question action from the palette to the global publisher layout. If the Question action already appears in the layout, drag it to the location where you want it.
4. Click **Save**.

Note: If you're using a customized publisher layout in groups or on records, make sure that the Question action is added to those layouts as well.

Enable Upvotes and Downvotes

Enable upvoting and downvoting in lieu of liking questions and answers in your Experience Cloud site. When you enable upvoting and downvoting, members see an **Upvote** option under a question or answer and a **Downvote** option on the question or answer's overflow menu. The **Like** option goes away. Upvoting and downvoting are disabled by default in Experience Cloud sites created in Spring '19 and later.

SEE ALSO:

Track Use of Chatter Questions in Your Salesforce Organization and Experience Cloud Sites

Enable Upvotes and Downvotes

Enable upvoting and downvoting in lieu of liking questions and answers in your Experience Cloud site. When you enable upvoting and downvoting, members see an **Upvote** option under a question or answer and a **Downvote** option on the question or answer's overflow menu. The **Like** option goes away. Upvoting and downvoting are disabled by default in Experience Cloud sites created in Spring '19 and later.

For sites created before the Winter '18 release, it's an easy task to enable up and down voting.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

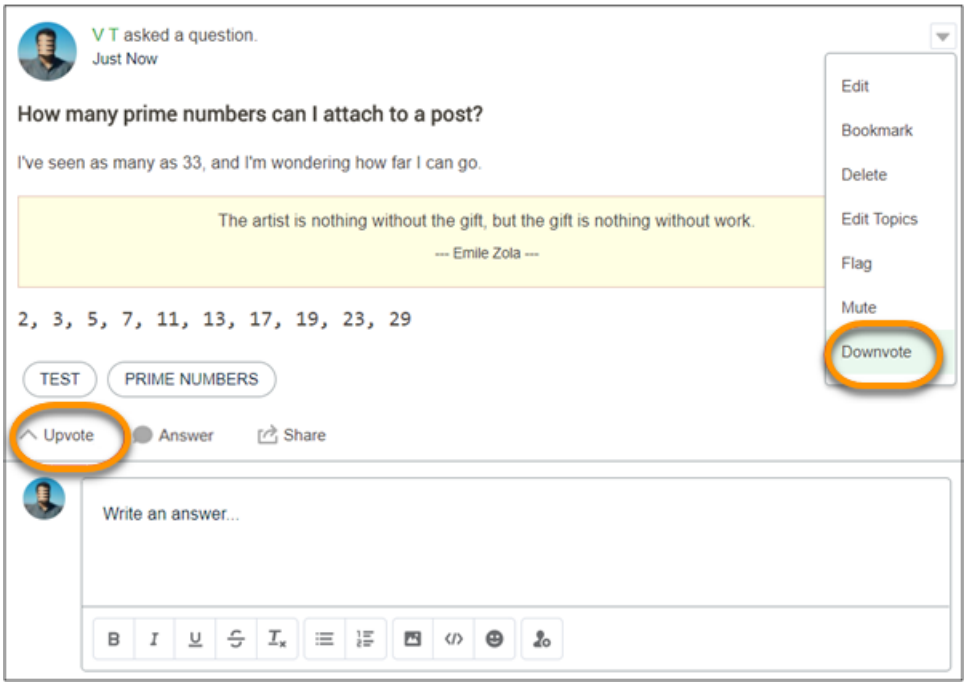
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

USER PERMISSIONS

To enable up and down voting:

- Create and Set Up Experiences



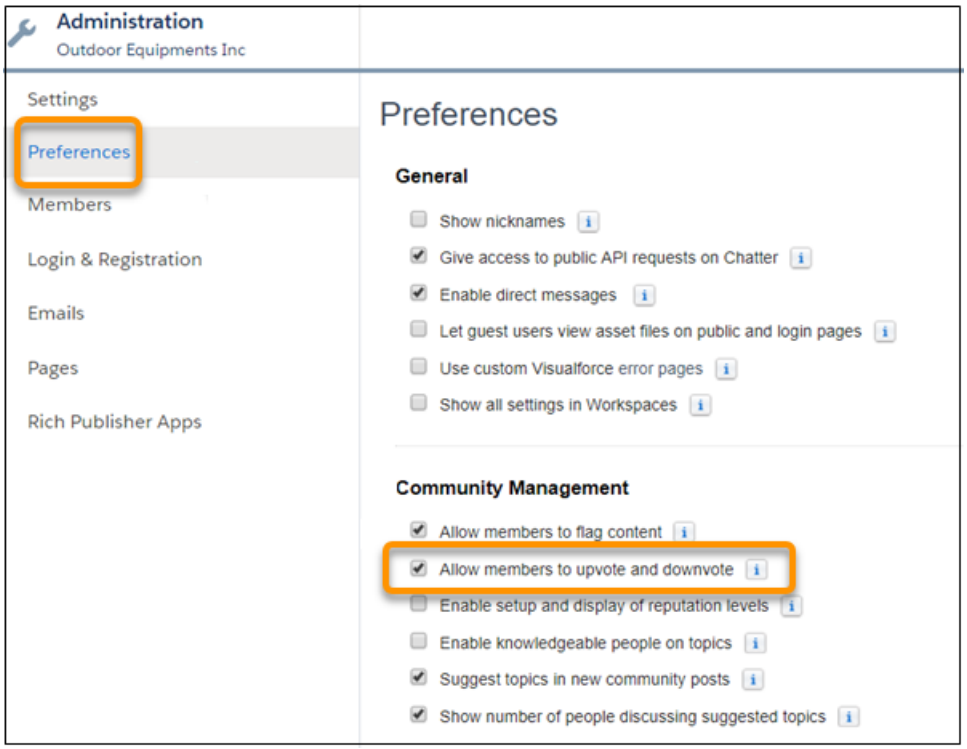
When you change to upvotes, pre-existing likes are included in the upvote count. Click the count to see a list of the people who have upvoted.

Note:

- No one is listed more than once, even if a person both liked and upvoted a question or answer. But each like and upvote is counted. For example, if someone both liked and upvoted a question, the count is 2, although their name is listed only once. If you prefer not to merge your like and upvote counts, contact Salesforce support.

- On influence cards, upvotes count as likes received. Your own upvotes on your own posts or comments aren't counted towards influence. Downvoting a post or comment doesn't reduce the like count, unless a user is changing their own upvote to a downvote.
- Members must be logged in to a site to use the upvote and downvote feature.

1. Go to Experience Workspaces and click **Administration** > **Preferences**.
2. Under Experience Management, select **Allow members to upvote and downvote**.



3. Click **Save**.

Data Model for Peer-to-Peer Conversations in Experience Cloud Sites

Experience Cloud uses Chatter behind the scenes for peer-to-peer conversations in Experience Cloud sites. To keep conversations in your internal org separate from the ones in an external-facing site, each Chatter post or conversation is tied to the Experience Cloud site that it belongs to. If you have more than one external-facing site, the same is true for conversations in each site—each one is tied to the site that it belongs to.

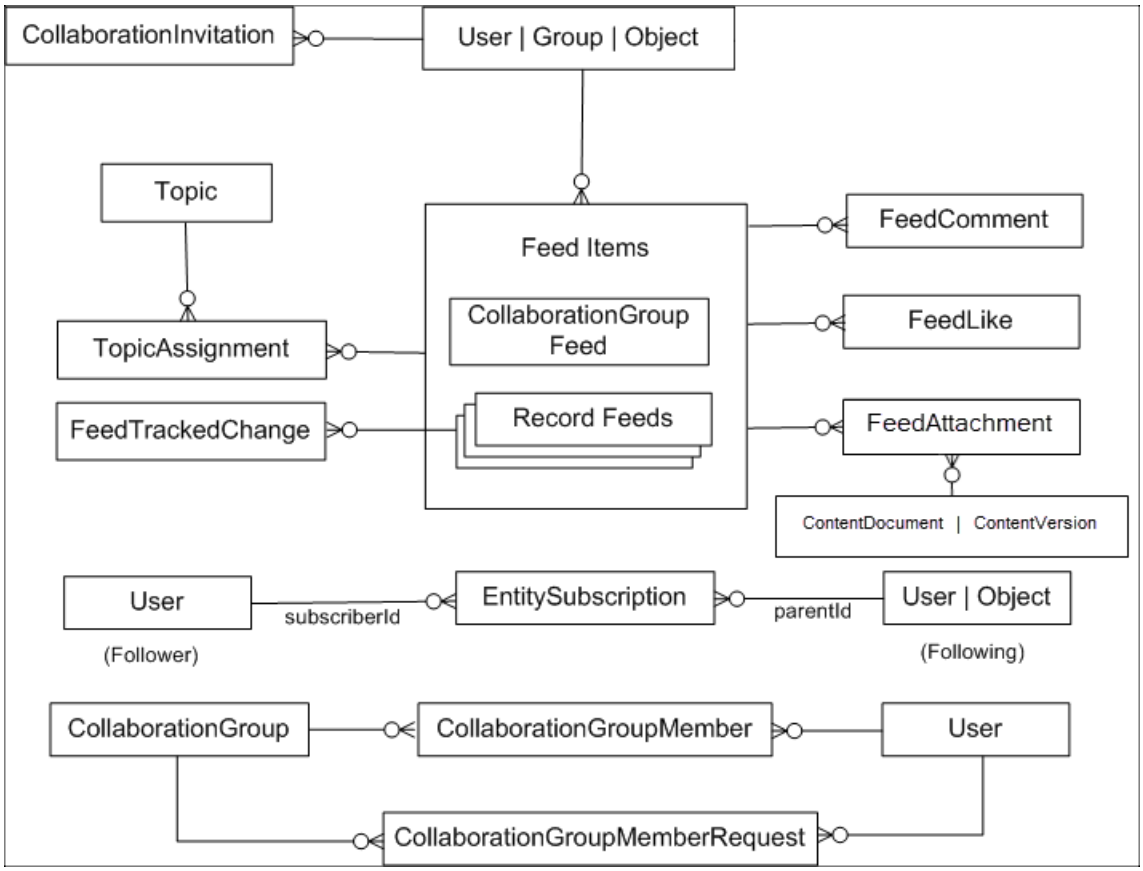
You don't have to worry about your Experience Cloud site users seeing your internal Chatter conversations, or vice versa. Here are the primary objects behind Chatter.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites



Here's what the key objects represent in terms of your peer-to-peer conversations.

- User—The person who is posting to the site.
- FeedItem—A new post or thread on a site.
- FeedComment—A comment added to an existing post.
- FeedLike—Tracks who liked a post.
- FeedAttachment—Tracks which file or link was attached to a post.
- FeedPollChoice—Shows the choices for a poll that's posted in the feed.
- FeedPollVote—Tracks how users voted on a poll that's posted in the feed.
- ContentDocument—Represents a file uploaded to the site as an attachment or an inline image in a post.
- ContentVersion—Tracks file versioning. When you upload a file (`ContentDocument`), a child `ContentVersion` record is created.
- CollaborationGroup—A group in the site.
- CollaborationGroupMember—A member of a group.
- Topic—A topic (#hashtag) of conversation.
- TopicAssignment —Links a topic to a conversation in the site.
- EntitySubscription: Tracks which records or users someone is following.

Here are a few other important objects to be aware of.

- Contact—All external site users (people who don't work for your company) must first be created as contacts before they can be enabled as a user of your Experience Cloud site.

- Account—The company that a contact works for. If you sell B2C and use person accounts, you load the person's info as a person account and not a contact. A person account creates a hybrid of an account and contact behind the scenes.
- Network—The site the forum posts map into.
- NetworkMember—Tracks the Chatter preferences for a user in a given site and the reputation points that they've earned. These records are created during your user load. To migrate users' reputation points, update them at the end of your migration.

Migrate Peer-to-Peer Conversations to Your Experience Cloud Site

Migrating peer-to-peer conversations from other platforms can be a part of creating an Experience Cloud site. Understand the steps to take before migrating and how to use Data Loader to migrate conversations.

Migrate Peer-to-Peer Conversations to Your Experience Cloud Site

Migrating peer-to-peer conversations from other platforms can be a part of creating an Experience Cloud site. Understand the steps to take before migrating and how to use Data Loader to migrate conversations.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Before you can load your data, perform these steps.

- Create your Experience Cloud site.
- Create the profiles to assign to your internal and external users, as applicable.
- Assign profiles to your site (**Setup** > **All Sites** > **Workspaces [for the site you're working on]** > **Administration** > **Members**).
- Create an Account and Contact (for B2B sites) or a Person Account (for B2C sites) before creating an external user. Internal users (employees of your company) aren't linked to accounts and contacts. Your internal users can exist in Salesforce, so you don't need to create them as users.
- Put together a plan for how to migrate your data. Identify how to transform the data from your current format into the format that Salesforce uses. We recommend that you do a trial run of your data load into a full sandbox before migrating in production. Create a guide to refer to when you do the load into production.
- As with all data migrations, do a test load of a few records first. Ensure the data looks as you expect, and then proceed with the full load. This process is especially important when loading conversations to ensure that they render the way you expect them to.

Important:

- When you create site users during the data load, don't send a welcome email. You can prevent this action by taking your site offline or by deactivating the welcome email option.
- To prevent users from receiving Chatter email alerts during the data load, turn off emails for all your site members. Email notification preferences are site-specific and are stored in the `NetworkMember` object. Query `NetworkMember (SELECT Id,NetworkId,PreferencesDisableAllFeedsEmail FROM NetworkMember WHERE NetworkId = 'ENTER YOUR 18-DIGIT SITE ID HERE')` and set the `PreferencesDisableAllFeedsEmail` field for all users in the community to `TRUE`. Be sure to set it back to `FALSE` after the entire data load is complete so that site members get email notifications after the site is live. We advise not globally disabling all system emails from your sandbox when doing a test load. Disabling all system emails when doing the data load in production prevents other departments that also use your Salesforce instance from sending email.

There are many dependencies between objects when migrating posts, so it's important to pay attention to the order in which the data is loaded. Here is our recommended order and the key required fields to populate to be successful.

1. Accounts—Ensure that the Account Owner for each account has a role assigned to their user. If you aren't specifying an Account Owner, ensure that the user doing the data load has a role assigned to them. Users without an assigned role can't load users.
   a. For business accounts—`Account Name`

   b. For person accounts—`First Name`; `Last Name`

2. Contact—If you're person accounts, upload contacts as they're automatically created when you load their information to the Accounts object. At a minimum, be sure to load these fields.
   a. `AccountId`
   b. `First Name`
   c. `Last Name`

3. User
   a. `ContactId`: Leave blank if creating a user in your Salesforce org who works for your organization. Only external users must be linked to a contact.
   b. `FirstName`
   c. `LastName`
   d. `Email`
   e. `Username`: The username in the format of an email address that members use to log in and isn't visible to anyone else in the site.
   f. `Alias`: The alias doesn't appear anywhere in the site, but it's a globally required field in Salesforce.
   g. `Nickname`: If you choose to use a nickname instead of first and last names, the nickname appears to users in the site.
   h. `ProfileId`
   i. `LanguageLocaleKey`: The user's language and locale.
   j. `LocaleSidKey`: The two-digit ISO language code. For example, English (United States) is en_US.
   k. `TimeZoneId`
   l. `EmailEncodingKey`: The email encoding for the user, such as ISO-8859-1 or UTF-8.

4. `CollaborationGroup`
   a. `GroupName`
   b. `OwnerId`: The user ID of the person who owns the group.
   c. `CollaborationType`: Controls the visibility of the group.
      - Public: Anyone can see and post updates. Anyone can join a public group.
      - Private: Only members can see the group feed and post updates. Non-members can see only the group name and a few other details in list views, search, and on the group page. The group's owner or managers add members who request to join the group.
      - Unlisted: Only members and users with the Manage Unlisted Groups permission can see the group and post updates. Other users can't access the group or see it in lists, search, or feeds.

5. `CollaborationGroupMember`
   a. `GroupId`: The ID of the group
   b. `CollaborationRole`: If the user is a Standard or Admin user.
   c. `MemberId` The user ID of the member.

6. `Topic`
   a. `Name`

   b. `Description`
   c. `NetworkId`: The 18-digit Experience Cloud site ID.

7. `ContentDocument`: For information about how to load files, see Upload Content with the Data Loader. You can leave the `ParentId` (for example, Library) field blank because files attached to Chatter records typically aren't stored in Libraries.
8. `FeedItem`
   a. `Body`: The main content of your post. Only specific HTML tags are supported, so make sure to clean your data before attempting to upload.
   b. `Type`: The kind of post made.

      Some common options:

      - `AdvancedTextPost`: For announcements in groups.
      - `ContentPost`: A post with an attached file.
      - `QuestionPost`: Used for posting a question to a topic or group. If using topics to organize your site, chances are that this type is the one you use the most.
      - `PollPost`: Used if the post includes a poll in groups.
      - `LinkPost`: A post with an attached URL (for example, a URL that isn't embedded into the body of the post and is stored in a separate field in your source system).

   c. `IsRichText`
      - `True`: Use when there's HTML markup.
      - False—Use if plain text.

   d. `NetworkScope`: The 18-digit site ID. To get the ID, you can query the Network object in Data Loader. This query returns the name and ID of all sites in your org: `SELECT Id,Name FROM Network`.
   e. `ParentId`: If this was posted into a group, enter the corresponding `CollaborationGroup` ID. If it was posted to a topic, enter the ID of the user who created the post.
   f. `Visibility`: `AllUsers`
   g. `Title`: If using a type of `QuestionPost`, enter the question title here.

9. `FeedComment`: When adding feed comments, it's crucial to add attachments at the time of creation. You can't edit a comment and add an attachment to it.
   a. `FeedItemId`: The parent post that the comment is related to.
   b. `CommentBody`: The content in the post.
   c. `ThreadParentId`: Leave empty if a comment is the first level down of comment on a post. If it is below an existing comment, enter the `FeedItemId` from its parent comment.
   d. CommentType
      - `ContentComment`: A comment that includes an attachment.
      - `TextComment`: A direct text entry on a comment.

   e. `RelatedRecordId`—ID of the `ContentVersion` object associated with a `ContentComment`. This field is null for all comments except `ContentComment`.

10. `FeedLike`
    a. `FeedItemId`: If the like is related to a post, enter the `FeedItemId` from the post here.

   b. `FeedEntityId`: If the like is related to a comment, enter the `FeedCommentId` from the comment here.

11. `FeedAttachment`
   a. `FeedEntityId`: The ID of the associated post (`FeedItem`) that contains this attachment.
   b. `RecordId`: The ID of the record that this feed attachment contains. For inline images, `RecordId` is a `ContentDocument` ID. For content attachments, `RecordId` is a `ContentVersion` ID.
   c. `Title`: The title of this feed attachment. When `Type` is `Link`, the `Title` value is the label for the attachment link. Otherwise, the `Title` value isn't used.
   d. `Type`: The type of this feed attachment. Valid values are:
      - `Content`: A content attachment.
      - `FeedEntity`: A feed entity, such as a shared post. Available in API version 39 and later in Lightning Experience.
      - `InlineImage`: An inline image. The system creates an inline image attachment when an image is added to the body of the associated `FeedItem`. You can't add an inline image directly by using `FeedAttachment`.
      - `Link`
   e. `Value`: Enter the URL here if the feed attachment is `Type = Link`. Otherwise, leave blank.

12. `TopicAssignment`
   a. `EntityId`: The ID of the post (such as `FeedItem`) that corresponds to the topic.
   b. `TopicId`: The ID of the topic to assign to the feed.

13. `EntitySubscription`
   a. `ParentId`: The ID of the record being followed. For example, it could be the ID of a user or a topic being followed.
   b. `SubscriberId`: The ID of the user who is following the record.
   c. `NetworkId`: The 18-digit site ID.

14. `NetworkMember`: Member records were already created. However, if you want to migrate user email preferences or reputation points earned, update these records as a final step of your migration.

Other Considerations

- External IDs—You can't add external ID fields to most of the objects, so keep your success files from each data load to track the relationship between your source data and Salesforce. You can then use `VLOOKUPS` to populate the Salesforce ID from the parent record created into the next file load.
- Threaded conversations—If your current platform uses threaded conversations, load `FeedComments` in several batches. For example, group all top-level comments into one file and load them. Then group all the posts beneath those comments into the next data load, and so on. Only threaded conversations that are three levels deep are supported.
- Inactive users—If you've had your legacy forum for some time, chances are that you have some users who are no longer active. Migrate them as active users so that you can bring over their posts and comments, and then deactivate their user record. If you're using member-based licenses and are migrating more users than you have licenses, before starting your data load, contact your Account Executive to discuss which options are available.
- Formatting posts—The trickiest part of this load is getting your posts into the correct format. If you can't migrate your posts exactly the way you want with these instructions, see the Connect REST API Developer Guide for how a developer could load your posts and comments to the site.
- Updating Chatter posts to select best answer—If your current forum has the concept of a best answer, update the `BestCommentId` field on the `FeedItem` records after loading all your `FeedComments`. You can't set this value during the initial `FeedItem` insert, because the child `FeedComment` records don't yet exist.

- Uploading Chatter profile photos and Chatter polls—This upload must be done via Connect REST API. For more information, see this guide on photos and this guide on polls.
- What can't be migrated—For example, you can't migrate the view count on posts or whether a user has or hasn't viewed a post.

Work with Files in Your Experience Cloud Site

Customize Salesforce Files settings and understand file sharing and visibility to get the most out of Files in your Experience Cloud site.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

File Visibility and Sharing in Experience Cloud Sites

When sharing and viewing files, context matters. Experience Cloud site files are tied to the site context in which they're created or uploaded, with a few exceptions.

Customize Experience Cloud Site Libraries with Images

Give each library a unique look by branding it with an image.

Limit Files in Your Experience Cloud Site

Restrict the size and types of files that your members can upload. This list of file types lets you control what your members upload and also prevents spammers from polluting your Experience Cloud site with inappropriate files.

Make Files on Records Visible to Customers

The Customer Access toggle on a file's sharing detail page lets you decide when customers can see individual files on records.

Display Images Faster on All Devices

When guest users visit your site, cached images are optimized to best suit the user's phone, tablet, or desktop computer. Image optimization makes your site's pages load faster, which creates a better browsing experience for your visitors.

Display Optimized Images on Mobile Devices

Asset file images are optimized for mobile display in Experience Cloud istes. Mobile-optimized image display creates a version of images that is better suited to a small screen and slower connection. This preference, which is enabled by default, lets customers who use file assets in sites see logos and product images faster on mobile devices.

File Visibility and Sharing in Experience Cloud Sites

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EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Table 1: File Visibility and Sharing in Experience Cloud Sites

Who	What	File Visibility	File Sharing
Site user	Files - general	Regardless of the Experience Cloud site, users see files: • they own • shared with them directly • shared to an Experience Cloud site they're a member of • shared to a group they can access	For files that are not in libraries, you can only share them in the Experience Cloud site where they were uploaded. For files in libraries that you can access, you can share them across sites when you share to a record. You can't share files from the file detail page in Experience Cloud sites. Prevent others from sharing and unsharing a file that you own by

Who	What	File Visibility	File Sharing
		• they can access within a library • posted to a record they have access to and when visibility on that file is set to allow them to access it • content added from Salesforce CMS When you enable Chatter for your org, make sure you've also enabled Chatter for your users. This way, they can access all Salesforce files in your org, including asset files.	checking the **Prevent others from sharing and unsharing** option on the file's sharing settings or detail page. Users with the Manage Experiences permission or Access Experience Management can share files across sites. For example, a file created in site A can be shared in site B.
Site user	Files shared with users	To view a file, the user must be a member of the Experience Cloud site the file was created in.	If users can view a file, they can share it, unless the **Prevent others from sharing and unsharing** option is enabled.
Site user	Files shared with groups	To view a file shared with a group, the user must have access to the group and the Experience Cloud site where the file was uploaded.	To share a file with a group, the group and the file must be in the same Experience Cloud site.
Site user	Files on records	To view a file on a record, the user requires access to the record. The file visibility on the record must be set to allow site users.	A library file can be shared with a record with no restrictions. Use the Customer Access switch on a file's sharing detail page to allow customers to see individual files on records.
Site user	Files in libraries	Site users who are members of a library can view files in that library.	To share a file with a library, you must be a member of the library. Users with the Manage Experiences permission or Access Experience Management can share library files across sites.
Guest user	Files - general	To give guest users access to files in Experience Cloud sites, select Give access to public API requests on Chatter in **Experience Workspaces** > **Administration** > **Preferences**.	To let guest users upload files in Experience Cloud sites, select **Allow site guest users to upload files** in **Setup** > **Salesforce Files** > **General Settings**.
Guest user	Files shared with records	When your Experience Cloud site allows guest users, they can access a file shared with a record on any entity, such as an account or opportunity. Guest users can view Notes and Attachments but not the Files Related List. Learn how to enable Customer Access for a file.	For guest users, only publicly accessible files can be downloaded.

Example: To share from a library to a group in an Experience Cloud site, upload the file to the Files List component in an Aura site. This is an example of uploading to the library within the context of the site. Alternatively, you can share the file with a record, or custom object that is accessible in the site.

Customize Experience Cloud Site Libraries with Images

Give each library a unique look by branding it with an image.

Library users can identify libraries at a glance without having to figure out which library to access. Library administrators can change images as libraries evolve or switch off branding.

EDITIONS

Available in: Lightning Experience

Available in: **Professional**, **Enterprise**, **Performance**, and **Unlimited** Editions

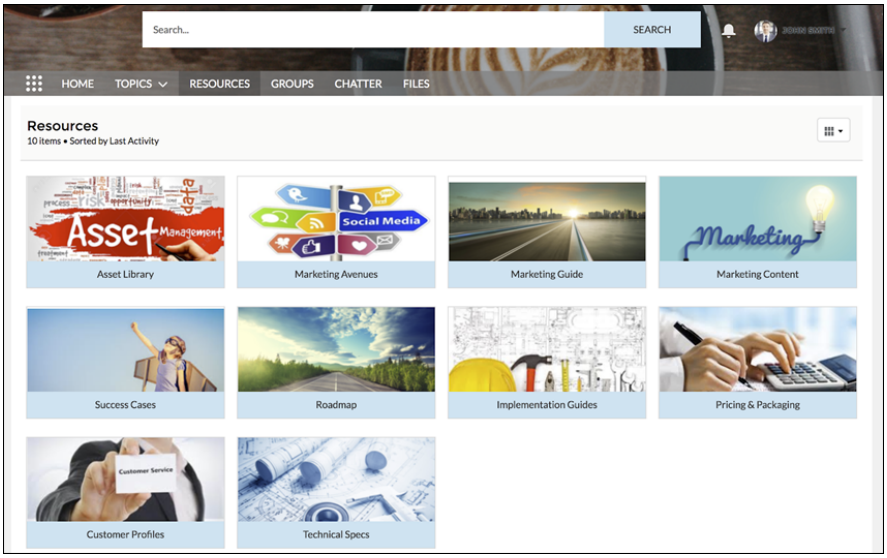
USER PERMISSIONS

To customize a library:

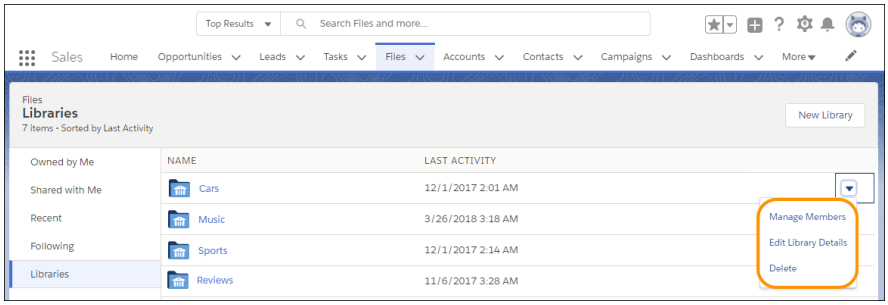
- Manage Salesforce CRM Content

  OR

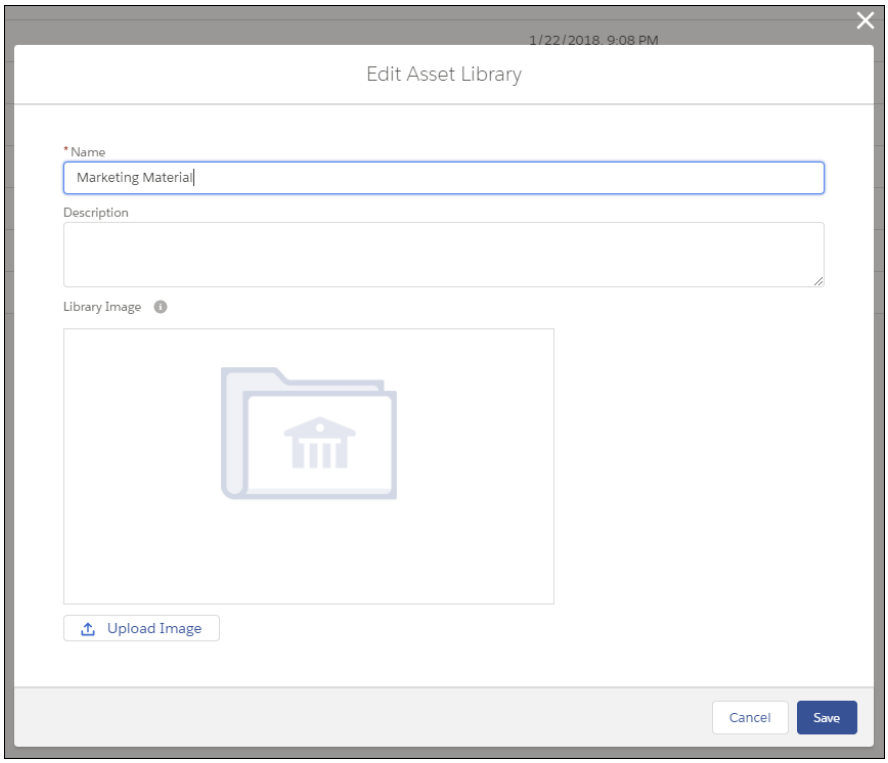
  Manage Library



1. To add a custom library image, from Files Home, click the dropdown to the right of a library, and choose **Edit Library Details**.



2. Click **Upload Image** under Library Image. For best results, choose an image in a 16:9 aspect ratio (for example, 480 pixels by 270 pixels).



Note: Branded library images are visible only in the desktop Libraries component tile view. Depending on their permissions, some external users can see library asset images, even if they're not library members. Choose images that you'd like everyone to see. You can remove custom images anytime. If you don't add a custom image, the default library image appears on the folder.

Limit Files in Your Experience Cloud Site

Restrict the size and types of files that your members can upload. This list of file types lets you control what your members upload and also prevents spammers from polluting your Experience Cloud site with inappropriate files.

File moderation must be enabled for your org before you can limit files in your Experience Cloud site. If you don't see the option to limit files in Experience Workspaces, contact Salesforce.

Your file limits apply to files uploaded by members anywhere in the site—in posts and comments, directly in the Files tab, and from the Salesforce mobile app. You can also set file limits using SOAP or Metadata API.

Files uploaded before setting your file limits are unaffected. However, newer versions of those files must meet the limits you specify.

Keep the following things in mind:

- A file must meet the file limits set in the Experience Cloud site in which it's uploaded. For example, if a customer uploads a file on a case and then an agent uploads a newer version in your Salesforce internal org, the limits from the customer site still apply.
- Files uploaded in your internal Salesforce org that are shared in a site aren't subject to site file limits.

1. Open Experience Workspaces.
2. Select **Administration** > **Preferences**, then enter your limits in the Files section on the page.
   a. `Maximum file size in MB`—Enter a number between 3 MB and your org's maximum file size. To use the default limit of 2 GB, leave this field empty or enter *0*.
   b. `Allow only these file types`—Enter file extensions separated with a comma (for example: *`jpg,docx,txt`*). You can enter lowercase and uppercase letters. You can enter up to 1,000 characters. To allow all file types, leave this field empty.
3. Click **Save**.

After you set your file limits, members receive an error message if their file is larger than the size you set or if their file extension isn't allowed.

When a member tries to upload multiple files at once and a file is found that doesn't meet your limits, none of the files are uploaded.

Note: By default, guest user files are blocked from being uploaded. After developer customizations (Lightning pages, for instance) have been created, admins can change the settings to let guest users upload files. To enable, go to Setup and in **Salesforce Files** > **General Settings** select Allow site guest users to upload files.

Note: Files uploaded by guest users are unassigned. Unassigned files are public by default. We recommend setting up a trigger to assign an owner to files uploaded by guest users. You may also wish to restrict file upload size or type using file moderation.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To limit files:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

SEE ALSO:

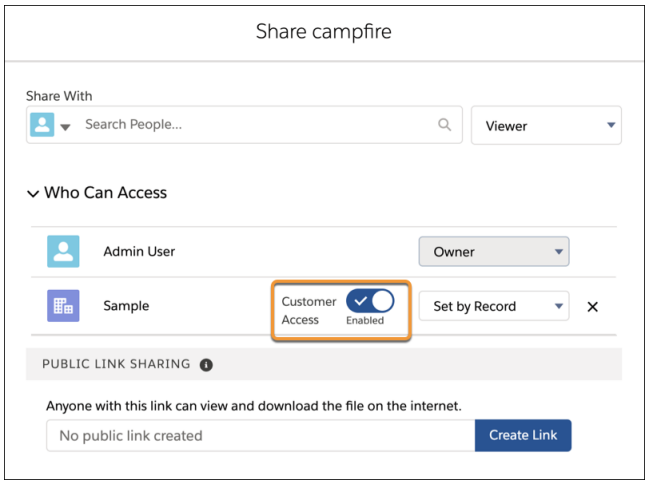
Configure Settings in Your Administration Workspace

Make Files on Records Visible to Customers

The Customer Access toggle on a file's sharing detail page lets you decide when customers can see individual files on records.

Ensure that your customers can access files on records. Enable digital experiences to view the Customer Access option on a file's sharing detail page. Users with collaborator or owner access to the file can change the Customer Access option. Users with view-only access to the file have read-only access to the Customer Access Option. External users can't see this option.

On Files home in Salesforce, from the row-level action list or file preview, click **Share**. To see where the file is shared, in the sharing detail window, expand the **Who Can Access** section. The customer access option is visible in the sharing detail of any file shared with a record.



To set the sharing level, in the menu next to the Customer Access option, select **Viewer** to give the customer view access to the file. If you choose **Set by Record**, then the customer's file access depends on their record access. View access on the record provides view access to the file, and edit access on the record provides collaborator access on the file. The Customer Access option isn't available to files shared with users, groups, workspaces, Experience Cloud sites, or orgs. If your org doesn't have Experience Cloud enabled, the sharing setting for files on records defaults to **Customer Access - Enabled**. If you do enable digital experiences in your org, check record access settings to ensure you're sharing the files you want with the correct customer users.

Note: You can only share files to records from the record using the Files related list or posting in the record's feed.

To set the sharing settings for files sent through email, make sure that the email is in a draft form for the settings to go into effect.

SEE ALSO:

Make a File Private on a Record

Display Images Faster on All Devices

When guest users visit your site, cached images are optimized to best suit the user's phone, tablet, or desktop computer. Image optimization makes your site's pages load faster, which creates a better browsing experience for your visitors.

Optimization reduces an image's byte size while keeping the perceived image quality as close to the original image as possible. The optimization feature determines the best width and image format to use based on the user's device, browser, and operating system.

This feature is available for sites that use the Salesforce CDN. Our CDN is enabled by default for sites that use enhanced domains. You can also configure custom domains to use the Salesforce CDN option. If you have an existing custom domain on a shared certificate, we recommend that you switch it to a single certificate. There's no downtime when you switch from a shared to a single certificate. On the Domain Edit page, select the option **Single certificate for content delivery network (CDN)**.

The image optimization feature supports JPEG, PNG for images with transparency, GIF, and web image formats. It doesn't support Photoshop (PSD), RAW, or SVG formats.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR, Aura, and Visualforce sites

Use these recommendations when you upload images.

- Use images with a width of 2,000–4,000 pixels.
- Keep the image's file size between 200 KB and 2 MB.
- Use the sRGB color profile.

To disable this preference, in Experience Workspaces, under **Administration** > **Preferences**, deselect **Optimize cached images for guest users on all devices**.

Display Optimized Images on Mobile Devices

Asset file images are optimized for mobile display in Experience Cloud istes. Mobile-optimized image display creates a version of images that is better suited to a small screen and slower connection. This preference, which is enabled by default, lets customers who use file assets in sites see logos and product images faster on mobile devices.

To disable this preference, deselect **Optimize images for mobile devices** in Experience Workspaces under **Administration** > **Preferences**.

Enable Ideas in Your Experience Cloud Site

Ideas enable a group of users to post, vote for, and comment on ideas. Enabling Ideas provides an online, transparent way for you to attract, manage, and showcase innovation.

To manage org-wide settings for Ideas, follow these high-level steps:

1. From Setup, enter *`Ideas Settings`* in the `Quick Find` box, then select **Ideas Settings**
   a. To enable Ideas for your org, select the `Enable Ideas` checkbox.

      After you enable the HTML editor, you can't disable it.

   b. Optionally, select `Enable Text-Formatting, Images and Links` to enable the Ideas HTML editor, which gives users WYSIWYG HTML editing and image referencing capabilities when they post or comment on ideas.

   c. Ensure that the multi-select `Categories` field is enabled by clicking the **Enable** button located below the Categories message at the top of the page. This button is not displayed if your organization already has the `Categories` field enabled.

   d. To let Ideas members associate more than one category with an idea, select `Enable Categories`. After you enable multi-select categories, you can't disable it.

   e. To let users earn points and ratings based on their activity in each zone, select `Enable Reputations`.

   f. In the `Half-Life (in Days)` field, enter the number of days.

      The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life.

2. Define and customize fields for Ideas:
   a. Define picklist values for the `Categories` and `Status` fields.

      Make sure that you add the categories and statuses to the zones you are including in the Experience Cloud site.

   b. Set field-level security for standard and custom fields.

   c. Create custom fields and set validation rules on them.

      Custom fields appear in the Additional Information section on the Post Idea and Idea Detail pages.

EDITIONS

Available in: Salesforce Classic not available in all orgs

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize Ideas settings:
- Customize Application

To view Ideas:
- Read on Ideas AND Read on Idea Themes

   d. Optionally, add the `Attachment` field to the layout and set field-level security to enable users to add files to their ideas.

3. To enable experts within your zones, create a public group that includes these users.
4. Optionally, enable Idea Themes in your org.
5. Create one or more zones to organize ideas into logical groups, and associate the zones with the Experience Cloud site.
6. Customize your Ideas page layouts to display the information you want to see.
7. Create validation rules that prevent offensive language from being used in the zone
8. Set up Apex triggers and validation rules for comments on ideas.
9. Enable user profiles for members and moderators and ensure the profiles can access Ideas.

   Important: To view Ideas, guest user profiles created after October 1, 2018 must have the Read on Ideas and Read on Idea Themes user permissions manually enabled.

10. Add the Ideas tab and the Idea Themes tab to the site.

SEE ALSO:

Enable and Customize Ideas Settings

Build and Customize Your Experience Cloud Site

Choose from several preconfigured templates to create your site. Then customize the site to suit your needs and match your brand.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Which Experience Cloud Template Should I Use?

Experience Cloud templates let you build responsive sites for delivering rich, branded spaces for your customers and partners. And with Experience Builder, you can accomplish a lot without coding. For example, you can edit a template's components to include information about your site, add images to extend your branding, and include CMS content. And if you want a more customized experience, you can create custom pages, add components to pages, build custom Lightning components, and expose more Salesforce objects.

What Is the Enhanced Sites and Content Platform?

The enhanced sites and content platform is a flexible new system that brings together Salesforce CMS and LWR sites. From Winter '23, enhanced LWR sites and enhanced CMS workspaces that you create are hosted together on a redesigned platform that offers partial deployment, site content search, and easy content management.

Create an Experience Cloud Site

Create an Experience Cloud site using a wizard that helps you choose a template that meets your business needs.

Customize Sites with Experience Builder

Experience Builder lets you easily style your site, create and customize pages, add drag-and-drop components, and deliver personalized experiences to different audiences. Choose a template to quickly start your site, and then style the pages to match your company's branding.

Manage Your Site's Pages and Their Properties in Experience Builder

The Pages and Page Action menus centralize all your page-related needs, from page creation to audience criteria-based page visibility and everything in between.

Track Site Users with Your Google Analytics Tracking ID

Add your Google Analytics™ tracking ID to track page views. Enable access to your Salesforce data for deeper insights. Then, adjust your pages to more accurately reach your customers.

Multilingual Sites

Experience Builder lets you create different language versions of your site to serve separate international audiences. For example, let's say that you have customers in France and Germany. You can deliver the same site experience to each in the language that's appropriate for their region.

Improve Experience Cloud Site Performance

Analyze your Experience Cloud site's volume, traffic, and transaction loads to determine if your site could benefit from the many performance optimization tools available.

SEO for Experience Builder Sites

Search engine optimization (SEO) ensures that your public Experience Builder site is visible to search engines. SEO helps customers, partners, and visitors find your content via online search.

Connect Experience Cloud to Data Cloud (Beta)

To provide customers the personalized, individual experiences they now expect, you need detailed insights about your users and how you can best engage with them. By connecting your enhanced LWR sites to Data Cloud, you can capture user interaction data, like clicks, scrolls, and product interactions, and send that to Data Cloud. From there you can organize your data and use it to create user profile maps, build robust site analytics, personalize your sites, generate recommendations, and discover new ways to use AI.

Add Salesforce CMS Content to Your Experience Builder Site

Use the Digital Experiences App to create, manage, and publish engaging content for your Experience Builder site. Then display your Salesforce CMS content on your Aura or LWR site using Experience Builder tools. When you use Experience Builder sites together with Salesforce CMS, you can keep your brand and content consistent everywhere the content is published.

Add Salesforce CRM Data to LWR or Aura Sites

To help your users, customers, and partners accomplish more, share Salesforce CRM data on your Experience Builder site. Aura and LWR sites have different tools for displaying CRM data.

Configure Search Functionality in Experience Cloud Sites

Help your visitors find what they're looking for on your Experience Cloud sites.

Create a Branded Mobile App for Your Experience Cloud Site Using Mobile Publisher

Use Salesforce Mobile Publisher to create and distribute a fully branded mobile app for your Aura and LWR sites.

Lightning Bolt for Salesforce: Build Once, Then Distribute and Reuse

Lightning Bolt for Salesforce lets you quickly build and distribute industry-specific Lightning Bolt Solutions to jump-start new org capabilities. Save time by building once and then reusing. Whether it's for your own org or you're a consulting partner or ISV, you can reduce the time required to implement solutions and cut development costs.

Customize Salesforce Tabs + Visualforce Sites

Update basic site settings like your site URL, site name, members, login options, and general preferences in the Administration tile of Experience Workspaces.

Which Experience Cloud Template Should I Use?

Experience Cloud templates let you build responsive sites for delivering rich, branded spaces for your customers and partners. And with Experience Builder, you can accomplish a lot without coding. For example, you can edit a template's components to include information about your site, add images to extend your branding, and include CMS content. And if you want a more customized experience, you can create custom pages, add components to pages, build custom Lightning components, and expose more Salesforce objects.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: Apart from Salesforce Tabs + Visualforce, all templates are Lightning-based templates that you customize in Experience Builder. However, although the Aloha template is Lightning-based, it's used to create an App Launcher, not a site. So when we talk about *Experience Builder sites and templates*, we mean all templates except Aloha and Salesforce Tabs + Visualforce.

- Customer Account Portal—A private and secure place for customers to access and update their account information. Improve customer relationships and decrease service costs by letting customers work in the portal. Customers can see and pay invoices, update their account information, and search your knowledge base for answers to their most frequent questions.
- Partner Central—A flexible, responsive template designed for channel sales workflows. Recruit, build, and grow your partner network to drive channel sales and marketing together in a branded online space. Easily configure lead distribution, deal registration, and marketing campaigns. Share training materials and sales collateral in a central space, and use reports to track your pipeline.
- Customer Service—A powerful, responsive self-service template with multiple prebuilt theme options. The Customer Service template lets users post questions to the community, search for and view articles, collaborate, and contact support agents by creating cases. Supports Knowledge, Chatter Questions, and cases.
- Help Center—A public-access, self-service community that exposes the articles that you make available from your knowledge base. You reduce the load on your customer support team, and your users get the satisfaction of finding their own solutions.
- Build Your Own (Aura)—Provides the basic pages that every Experience Builder site needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. Add more pages and components as needed for the experience you're building. To refine the look of your site, customize your branding and themes.
- Build Your Own (LWR)—Powered by the Lightning Web Runtime (LWR) framework, this customizable template delivers unparalleled page performance and improves developer productivity. Quickly build pixel-perfect pages and develop Lightning web components and themes that match your unique brand.

  Suitable for developers, consulting partners, and ISVs who are familiar with developing custom Lightning web components, and working with Salesforce DX, User Interface API, and Apex. See the LWR Sites for Experience Cloud guide.
- Microsites (LWR)—Use the power of LWR to create beautiful, high-performance sites perfect for event pages, landing pages, or other special purpose websites. Microsites gives you all the tools to quickly spin up a website and then archive it when it's no longer needed.

  Suitable for developers, consulting partners, and ISVs who are familiar with developing custom Lightning web components, and working with Salesforce DX, User Interface API, and Apex. See the LWR Sites for Experience Cloud guide.
- Aloha—A configurable App Launcher template that lets users quickly find applications and access them using single sign-on authentication, including social logins.
- Salesforce Tabs + Visualforce—Standard Salesforce structure and tabs that you can customize using Visualforce. Requires developer experience and advanced setup skills. Offers full platform access with a flexible configuration and supports most standard objects, custom objects, and the Salesforce mobile app.

  Salesforce Tabs + Visualforce isn't a Lightning-based template and therefore doesn't work with Experience Builder.

The Customer Account Portal Template

The Customer Account Portal template improves customer relationships and decreases service costs. The template provides features that make it easy for customers to see and pay invoices, update their account information, and search your knowledge base for answers.

The Partner Central Template

Partner Central is designed to support partner relationship management workflows: channel sales, channel marketing, lead distribution, deal registration, and partner recruitment and onboarding. Plus, Partner Central also includes functionality to map reports and dashboards for monitoring your pipeline.

The Customer Service Template

The Customer Service template provides a rich, self-service experience for your customers, where they can get answers to their questions at any time, on any device. With integrated knowledge articles and case management, customers can search for and view articles, post questions, or contact a support agent.

The Build Your Own Template (Aura)

The Build Your Own template provides the basic pages every Experience Builder site needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. And you can easily add more pages and components as needed for the experience you're building. Customize your branding and themes to refine the look of your site.

The Build Your Own Template (LWR)

Use the Build Your Own (LWR) template for Experience Cloud to create blazing-fast digital experiences, such as websites, microsites, and portals, using the Lightning Web Components programming model. Powered by Lightning Web Runtime (LWR), this customizable template delivers unparalleled site performance.

The Microsite Template

The Microsite template is the foundation for your small, special-purpose websites. Microsites are often used by companies that already have a full site but want a dedicated space for a single communication or conversion goal. Microsites work well to host an idea or product that requires more content than a single landing page. Built on the Lightning Web Runtime (LWR) platform, the template includes responsive layout and content components that you can use to quickly spin up a landing page, event site, or other web experience. Capture visitor information and send it directly to the Lead object with the Lead Form component.

Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates

Check out the list of all the objects supported by out-of-the-box components and pages in Experience Builder templates.

Considerations Before You Migrate an Aura Site to Lightning Web Runtime (LWR)

Sites that run on Lightning Web Runtime (LWR) boast increased speed, scalability, security, and design flexibility over Aura sites. Migrating your Aura site to an LWR site requires considerable planning. Keep these considerations in mind.

Migrate a Koa or Kokua Site to a New Template

The Koa and Kokua templates are retired, and you can no longer use them to create site. Salesforce supports existing sites built with Koa and Kokua, but we recommend migrating to newer templates. The new templates provide richer support for Salesforce Knowledge and case management, and they also receive updates and new features with each release.

Which Components Can I Use with Each Aura Template?

Aura site templates, such as Customer Service and Partner Central, are each composed of pages, which in turn are made up of customizable components. Consult this table to find out which Aura template each component can be used in, and when the component became available.

SEE ALSO:

Create an Experience Cloud Site

The Customer Account Portal Template

The Customer Account Portal template improves customer relationships and decreases service costs. The template provides features that make it easy for customers to see and pay invoices, update their account information, and search your knowledge base for answers.

Included Features

- Experience Builder pages and components
- Tile menu, for a visual navigation experience
- Global search with a customizable list of searchable objects
- Dashboards and reports
- Customizable branding and design
- Rich, responsive look and feel across multiple devices

Advanced Features That You Can Configure

- Audience targeting—Deliver custom content to partners by geography, tier, or other criteria.
- Lightning components—Check out the full list of compatible Lightning components that you can use to build out your site.

Included Pages

The Customer Account Portal includes the following pages.

- Home
- Account Management
- Article Detail
- Contact Us
- Create Record
- Dashboard
- Error
- Feed Detail
- File
- Flow
- Generic record pages
- Login
- Messages
- My Account
- Question Detail
- Quip Docs Related List
- Report
- Report Builder
- Resources
- Search
- Top Articles

- Topic Catalog
- Topic Detail
- User
- User Settings

The Partner Central Template

Partner Central is designed to support partner relationship management workflows: channel sales, channel marketing, lead distribution, deal registration, and partner recruitment and onboarding. Plus, Partner Central also includes functionality to map reports and dashboards for monitoring your pipeline.

What You Get Out-of-the-Box

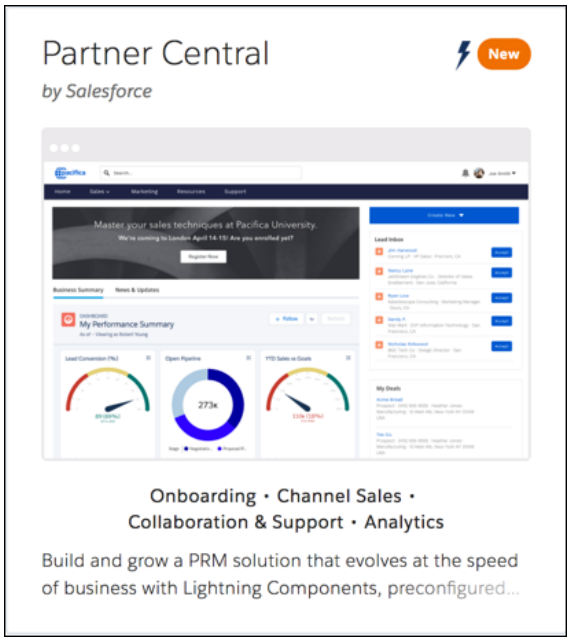
- Guided setup
- Experience Builder pages and components
- The Lead Inbox component to pass leads to partners
- Customizable Quick Create action menu that you can configure for deal registration
- Customizable navigation menu with preconfigured list views for leads, deals, and campaigns
- Global search with a customizable list of searchable objects
- Dashboards and reports
- Customizable branding and design
- Collaboration features such as groups, feeds, topics
- Rich, responsive look and feel across multiple devices

Advanced Features You Can Configure for Partner Central

- Audience-targeting: Deliver custom content to partners by geography, tier, or other criteria.
- Analytics: Configure Analytics reports for your site.
- Google Analytics™: Track site activity with Google Analytics.
- Lightning Components: Check out the full list of compatible Lightning components you can use to build out your site.

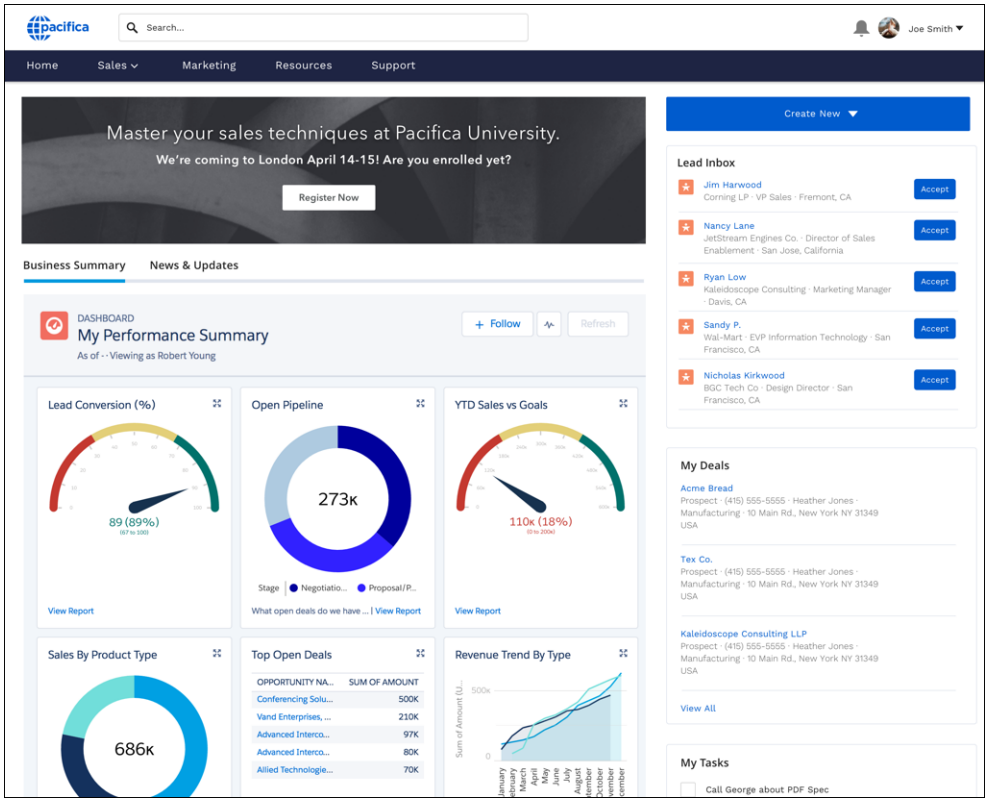
Partner Central in Action

Partner Central in Experience Workspaces

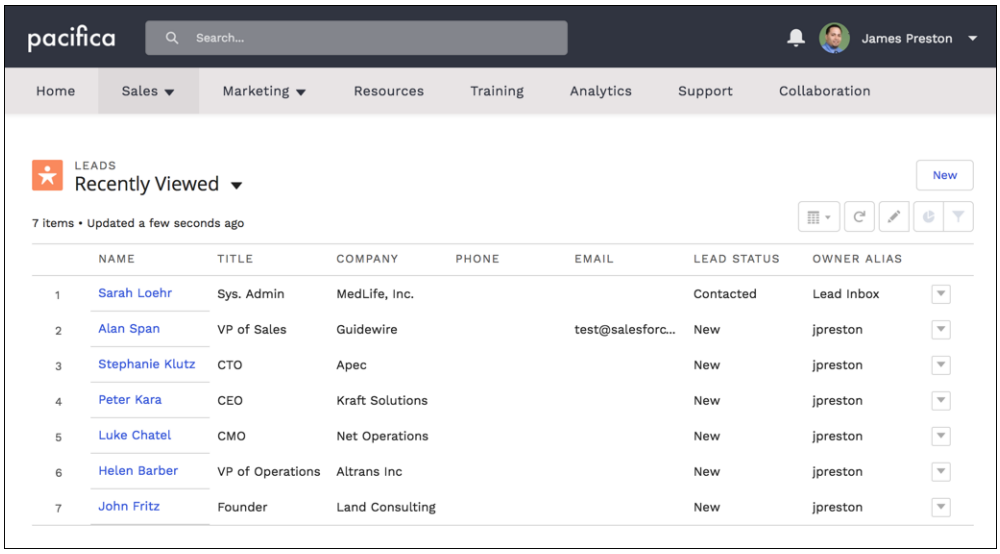


Partner Central Home Page

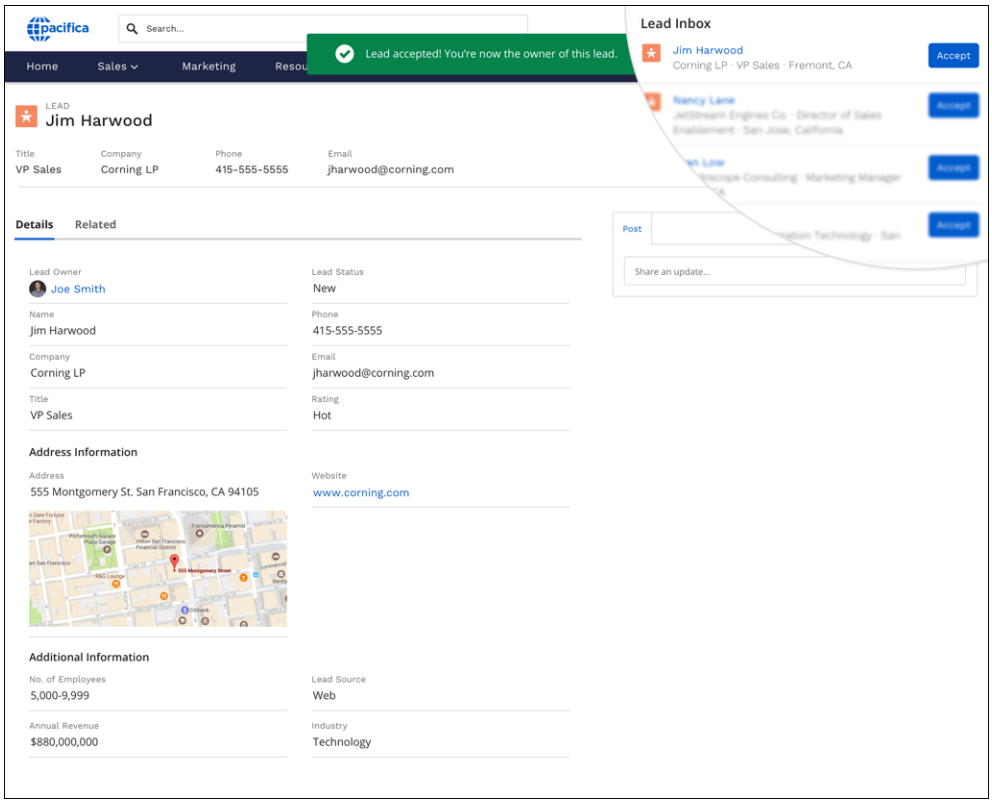
The Partner Central Home page includes lead inbox, global search, navigation menu, Quick Create menu, compact list views for deals and tasks, and reports and dashboards.



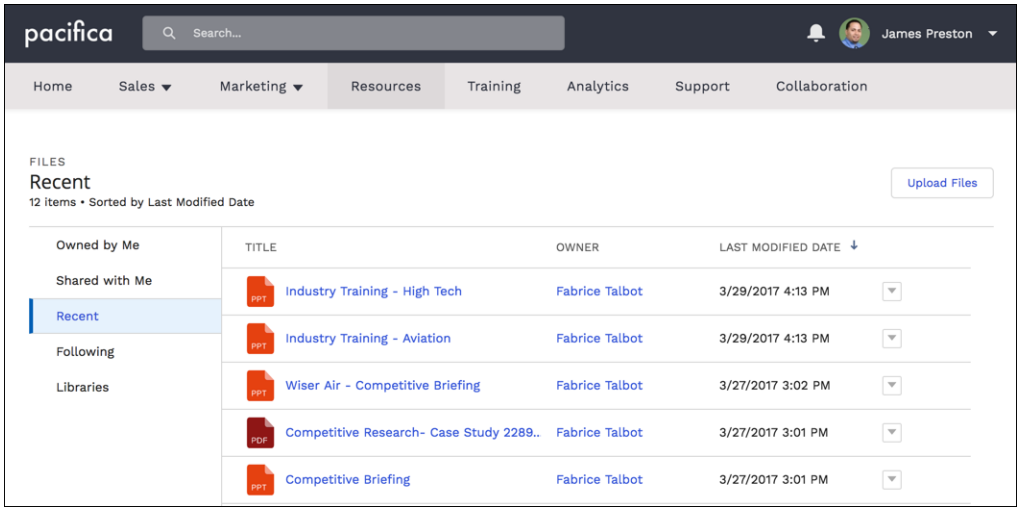
Leads List View



Lead Inbox and Lead Detail



Resources Page—Share Files and Libraries with Partners



The Customer Service Template

The Customer Service template provides a rich, self-service experience for your customers, where they can get answers to their questions at any time, on any device. With integrated knowledge articles and case management, customers can search for and view articles, post questions, or contact a support agent.

What You Get Out-of-the-Box

- Experience Builder pages and components
- Self-resolution of cases through knowledge and case creation
- Collaboration features such as groups, feeds, topics
- Global search with a customizable list of searchable objects
- Moderation rules to weed out trolls and bots
- Dashboards and reports
- Recommendations
- Customizable branding, design, and navigation
- Rich, responsive look and feel across multiple devices

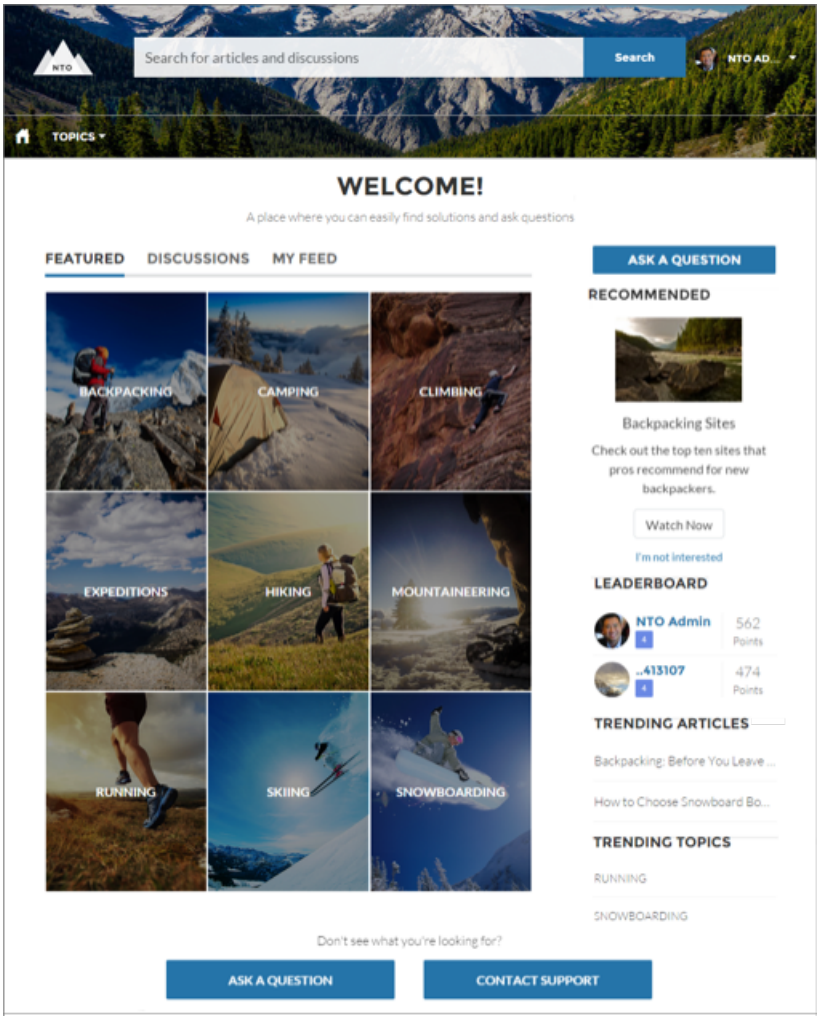
Advanced Features That You Can Configure

- Audience-targeting: Deliver custom content to partners by geography, tier, or other criteria.
- Google Analytics™: Track site activity with Google Analytics.
- Prebuilt and custom components: Check out the full list of compatible components you can use to build out your site.

Customer Support in Action

Customer Service Home Page

The Customer Service Home page includes featured topics and feeds, a leaderboard, recommendations, trending articles and topics, and support options. In addition, every page in the Customer Service template includes the template header, which provides global search, a profile menu, and navigation.



Customers Can Find the Help They Need

The Customer Service template adds discussions and suggested articles to your support community. When customers type a question in the search text box, the results include articles and similar questions that are based on matches with the typed text. If the answer isn't in the results, they can get help by asking a question in the community. Experts discuss the issue and provide a solution. And if they decide to contact customer support, they're shown a list of suggested articles based on keywords from the case subject and description. So there's an excellent chance they can find an answer without needing to create a support case.

Both guest users and logged-in users can access articles, search and view discussions, and contact agents through official support channels. When they log in to the site, they're also able to ask questions and participate in discussions in the feed. Members can answer questions in the community, just like commenting on a post in Chatter. And when a best answer is found, it's prominently displayed in the feed, allowing other users to quickly and easily find the answer.

Enhanced Profile and Navigation Experience

The Customer Service template has an enhanced profile and navigation experience for logged-in users. From the profile menu, users can quickly access their profile details, Chatter feed and list of cases, and contact customer support. Users with permissions to create or manage the site can also access management and setup pages directly from the profile menu. Users can edit their contact information and profile photo directly from their profile details. They can view statistics, such as how many posts and comments they've made and how many people they're following and are following them. User profiles also show user nicknames and reputation levels if they're enabled in the site.

Improved Organization with Topics

Topics help you structure a site to quickly guide members to the information that matters most. Choose navigational topics to provide an easy way for customers to explore, and featured topics to highlight current conversations and issues. Trending topics and related topics let members find active discussions and popular content. Member-created topics, meanwhile, let users organize information for each other, creating a personalized experience that boosts engagement. When setting up a site, you associate topics with existing data categories, so your articles appear in the appropriate topics.

Note: While the Customer Service template uses topics to display articles and questions, Knowledge articles are associated with data categories when they're created. To ensure that articles appear in the site, set data category visibility at the profile level for each category you associate with a topic. For instructions on setting default data category visibility, see Modify Default Data Category Visibility.

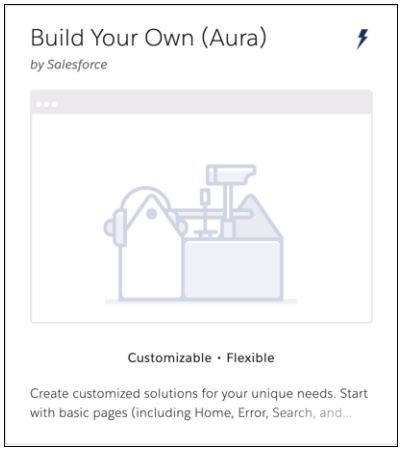
Included Pages

The Customer Service template includes the following pages.

- Home
- Account Management
- Article Detail
- Case
- Contact Support
- Create Record
- Dashboard
- Error
- Feed Detail
- File
- Flow
- Generic
- Group
- Login
- Messages
- My Account
- Question Detail
- Quip Doc Related List
- Report
- Report Builder
- Search
- Stream
- Top Articles
- Topic Catalog
- Topic Detail
- User Settings
- User

The Build Your Own Template (Aura)

The Build Your Own template provides the basic pages every Experience Builder site needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. And you can easily add more pages and components as needed for the experience you're building. Customize your branding and themes to refine the look of your site.



What You Get Out-of-the-Box

- Experience Builder pages and components
- Customizable branding and design

Advanced Features That You Can Configure

- Audience-targeting: Deliver custom content to partners by geography, tier, or other criteria.
- Google Analytics™: Track site activity with Google Analytics.
- Prebuilt and custom Lightning components: Check out the full list of compatible Lightning components you can use to build out your site.

Add Pages and Components

To view all components in the Components panel, select **Settings** > **Advanced** and click **Show All Components** in the Components Panel area. Some page functions require that you create a page in builder. For example, to view reports, first add a report object page to your site.

SEE ALSO:

Create Custom Pages with Experience Builder

The Build Your Own Template (LWR)

Use the Build Your Own (LWR) template for Experience Cloud to create blazing-fast digital experiences, such as websites, microsites, and portals, using the Lightning Web Components programming model. Powered by Lightning Web Runtime (LWR), this customizable template delivers unparalleled site performance.

Lightning Web Components uses core web components standards and provides only what's necessary to perform well in browsers supported by Salesforce. Because the components are built on code that runs natively in browsers, they're lightweight and efficient.

The template's performance features, such as publish-time freezing and HTTP caching, help you build richer experiences to target B2B and B2C markets.

Standard Components for LWR Templates

Standard components are built by Salesforce. Several are available when building sites with the Build Your Own (LWR) and Microsite (LWR) templates, which are powered by the Lightning Web Runtime (LWR). Unlike Aura templates, which have specific components for specific site functions, LWR templates provide more general components that use concepts like data binding to achieve the same goals, but faster and more dynamically.

Considerations for Using Flows in LWR

Using flows in your LWR sites lets you automate your business processes and use the versatility of Flow Builder to your advantage. But before you implement flows in your LWR sites, it's important to understand the limitations.

Actions Bar Considerations in LWR Sites

With the Actions Bar component, users can take action on Salesforce data directly from your LWR site. But before you add actions to LWR sites, it's important to understand the limitations.

Send Visitor Information to the Salesforce Case Object

Use the Contact Support Form component in the LWR template to capture visitor information in your site and let users create a case in Salesforce.

Standard Components for LWR Templates

Standard components are built by Salesforce. Several are available when building sites with the Build Your Own (LWR) and Microsite (LWR) templates, which are powered by the Lightning Web Runtime (LWR). Unlike Aura templates, which have specific components for specific site functions, LWR templates provide more general components that use concepts like data binding to achieve the same goals, but faster and more dynamically.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

Note: To give access to guest users, enable **Allow guest users to access public APIs** in the site's Administration workspace, under preferences.

Embedded Messaging

To modernize how you communicate with customers, add Messaging for Web to your Experience Builder site. See Configure a Messaging for Web Deployment in an Experience Builder Site

HTML Editor

Use the HTML Editor component to create and edit custom content in HTML. In organizations with at least 1 active community license, this component can use data binding to dynamically populate content from Salesforce CMS and other data sources on record and CMS detail pages.

Results Layout

Add the Results Layout component, along with the Search Bar component, so that your site visitors can view search results. The Results Layout component is available only after you create a standard Search page. See Set Up CMS Content Search in an LWR Site and Set Up CRM Search in LWR Sites (Beta).

Rich Content Editor

Use the Rich Content Editor component to add formatted custom text to your site pages, along with images and videos. To add alt text to an image, make sure that the component is in edit mode, then right-click the image. In orgs with at least 1 active community license, this component can use data binding to dynamically populate content from Salesforce CMS and other data sources on record and CMS detail pages.

Note: Branding changes that you make using the Themes tab and branding design tokens don't apply to the Rich Content Editor component.

Search Bar

Add the Search Bar and Results Layout components so that visitors can search for CMS content and CRM records. When you add the Search Bar component to the header section, search is available across all site pages. See Set Up CMS Content Search in an LWR Site and Set Up CRM Search in LWR Sites (Beta).

Tabs

Add up to 5 horizontal or vertical tabs and control the way they look on your site. Drop any content component into a tab region. You can use a data-bound component to show products in one tab, a button to contact support on another tab, and a list of your product's features on a third.

Tile Menu

Add an intuitive and visually stunning navigation experience to your site.

Available in Orgs That Have at Least One Active Community License

Actions Bar

Help users act on Salesforce records from your LWR site. Add a custom set of actions, choose the number of actions in the bar, and customize how more actions appear in the dropdown menu. Individual action button styles are inherited from site branding settings. See Actions Bar Considerations in LWR Sites.

Banner

Create a banner layout on your site using images, text, and buttons. Use data binding in this component to dynamically populate content from Salesforce CMS and other data sources.

Button

Use buttons as calls to action linking to external pages or pages in your site. Nest the Button component inside other components, such as Banner and Tile, to add calls to action in any region of the page.

Card

Use this flexible container to add content in a rectangular card. You can specify the card's height, width, and background color, and you can customize image settings.

Columns

Add up to 6 columns of content components to your page. Customize the column structure by selecting the Column Layout icon. Resize the columns by using the handles between the columns. To delete a column, click beneath it.

Contact Support Form

To enable users to contact support and generate a case from your site, add the Contact Support Form component. Several preconfigured component fields streamline the collection of information from the user to get their support request submitted and resolved quickly. The component contains several custom fields that you can configure to your company's preferences.

Flow

Automate business processes with the Flow component. Add screen flows to your pages so that you can capture information, take customers through workflows, and use the flexibility of Flow Builder to your advantage. Flows that use Aura components aren't supported.

Flow Orchestration Work Guide

Use the Flow Orchestration Work Guide component so that credentialed site visitors can complete work items assigned to them by an orchestration.

Grid

Use the Grid component to show collections or list views in LWR sites. Select a data source, layout, and pagination option to show content saved in Salesforce. In non-enhanced LWR sites, the Grid component shows object list views. In enhanced LWR sites, the

component can display object list views or CMS collections created in enhanced workspaces. When you select the **Show pagination** option, you can customize how you want users to navigate through content on your site.

Note: In commerce stores, the grid component has a third data source, Nested Expression. With the Nested Expressions data source, you can bind data nested in the top-level data source. Nested Expressions gives you more flexibility to show data that hasn't been put into list views.

Horizontal Line

Add a horizontal line to visually separate elements on the page. Choose the line's weight, width, and style.

Image

Use the image component to add images to your page. Add the image URL and alt text for screen readers. This component can dynamically populate content from Salesforce CMS and other data sources when used on CMS or record detail pages.

Knowledge Article

Use the Knowledge Article component to show site visitors knowledge articles in LWR. Salesforce admins can toggle between field labels and field sections and adjust the style of the knowledge article title. Mandatory field labels, such as URL Name, that your site visitors don't need are also hidden.

Knowledge Article List (Beta)

Use the Knowledge Article List (beta) component to show knowledge articles that belong to the same data category on LWR sites. You can also control how knowledge articles are sorted on the page for more customization opportunities.

Language Selector

Allow users to choose their own site language. After configuring translations, add the Language Selector component to your page to provide a language selection dropdown menu.

Note: In a site that has only one language, you can drag the Language Selector onto a page, but the component is disabled and unavailable. None of the customizations you make in the component property panel are saved.

Lead Form

Route leads gathered in your site to the Leads object in Salesforce. Using preconfigured mappings, you can transfer your lead data without tedious background setup.

List

Create lists that dynamically populate with CMS or CRM data based on your site's needs. Control the look and feel of the list data with ease from the property panel.

Marketing Cloud Form

Send contact information directly from your LWR sites to Marketing Cloud data extensions. Create data extensions from your Marketing Cloud Form component with one click and then start gathering customer info.

Overlap

Overlap content components on the page. Overlap an image with content components, such as Text Block and Button, for a layered look.

Page Refresh

On the Too Many Requests page, the Page Refresh component automatically refreshes the page for your customers. The Page Refresh component is built into the body of the Too Many Requests page, so there's no need to manually add it to the page.

Record Detail

View and edit records in your LWR site. In the component, users see the page layout that's assigned to their profile. The component inherits formatting, such as font and color, from your site's branding settings. The Record Detail panel doesn't show in the list of available components if it's not available for the object, even if **Show All Components** is checked. Note, Report, and ServiceReport objects aren't available for use with the Record Detail Component.

If state and country/territory picklists is enabled, when your users edit a record that contains controlling and dependent fields, the dependent field behavior is:

- The State/Province field is a text input, whose value must be manually entered in state code format. For example, `CA` is a valid entry, but `California` isn't.
- The Country field is a picklist. When you change the Country value, the State/Province value is cleared.

Site Logo
Personalize the login and registration pages with your logo. The Site Logo component replaces the Community Logo component as of Summer '23. Sites created before Summer '23 continue to use the Community Logo. If you want to use Site Logo, delete the Community Logo and drag the Site Logo component to the page.

Text Block
Add text to the page. Text formatting, such as heading tags and font size, is inherited from site branding settings.

Tile
Create a tile layout on your site using images, text, and buttons. Use data binding in this component to dynamically populate content from Salesforce CMS and other data sources.

Video
Use the Video component to add videos to your page. Add the video embed URL and settings such as aspect ratio, width, and horizontal alignment. Use data binding in this component to dynamically populate content from Salesforce CMS and other data sources.

To learn more about how to dynamically populate data in LWR templates, watch:

Watch a video

Considerations for Using Flows in LWR

Using flows in your LWR sites lets you automate your business processes and use the versatility of Flow Builder to your advantage. But before you implement flows in your LWR sites, it's important to understand the limitations.

Aura Components

LWR sites can't run flows that use Aura components. Make sure that all custom flow screen components are built using Lightning Web Components (LWC). We've included here a list of commonly used Aura components and features that you can't use in LWR. Keep in mind that this list isn't exhaustive.

File upload
File Upload is an Aura component that is often used in screen flows.

Image
Image is an Aura component that is often used in screen flows.

Local actions
Building or modifying custom Aura components to use as local actions in flows isn't available in LWR sites. This functionality is typically used to execute client-side logic in your flow.

Pause or Resume Flows

LWR doesn't support pausing or resuming flows.

Record Fields

If you place record fields directly on your flow screens, those fields don't appear in LWR sites. This Flow Builder functionality is sometimes referred to as automatic fields or dynamic forms for flows.

`lightning-out` Component

If you have custom Lightning Web Components or Aura components in your flow, then you can't use the `lightning-flow` component on LWR sites.

SEE ALSO:

Let Users Pause Flow Interviews

Record Fields on Flow Screens Considerations

Actions Bar Considerations in LWR Sites

With the Actions Bar component, users can take action on Salesforce data directly from your LWR site. But before you add actions to LWR sites, it's important to understand the limitations.

Supported Actions

The Actions Bar component supports these action types.

- The Edit standard action
- Create a Record, Update a Record, and headless Lightning web component quick actions

Lightning web component quick actions are available for record home objects that are enabled for LWC. If you can't create actions with the Lightning web component action type, they're not currently supported for that object. See Create a Lightning Web Component Action.

Action Overrides

Action overrides for standard actions aren't available in LWR sites. If you override the Edit standard action with a Lightning component, the default layout is used. If you override the Edit standard action with a Visualforce page, the action doesn't appear for your site users.

Lightning Page Navigation with Lightning Web Component Quick Actions

To use the `lightning-navigation` service in a Lightning web component, include a target in your LWR site.

Updating Quick Action Names

If you change the API name of a quick action after you add it to your site, the action doesn't appear for your site users. Remove the action from the Actions Bar component, and then add it back.

Deleting Quick Actions

When you delete a quick action that's used in an LWR site, you don't see a warning that the action is in use. Deleted actions don't appear for your site users.

Send Visitor Information to the Salesforce Case Object

Use the Contact Support Form component in the LWR template to capture visitor information in your site and let users create a case in Salesforce.

1. From Experience Builder, go to Workspaces, and then click the Administration tile.
2. From the Administration settings, select **Preferences**.
3. Under General, select **Allow guest users to access public APIs**, and then save your changes.
4. Set your field-level security for the Case object and Contact Support Form component.
   a. From Experience Builder, go to Settings.
   b. Under Guest User Profile, select the link with your site name.
   c. From the example profile, click **Edit**.
   d. Under Standard Object Permissions, next to the Case object, select **Read** and **Create**, and then save your changes.
   e. Under Field Level Security, click **Edit**, and then select standard fields to show in the form.

      For example, you can add these standard fields.

      - Name
      - Email
      - Phone

      You can also add any custom fields to the form, such as Subject and Description.

   f. Save your work.
5. Set your site accessibility to let guests access your site and use the form to submit a case.
   a. From Experience Builder, go to **Settings** > **General**.
   b. Under Public Access, select **Guest Users can see and interact with the site without logging in**.
   c. Save your work.

The Microsite Template

The Microsite template is the foundation for your small, special-purpose websites. Microsites are often used by companies that already have a full site but want a dedicated space for a single communication or conversion goal. Microsites work well to host an idea or product that requires more content than a single landing page. Built on the Lightning Web Runtime (LWR) platform, the template includes responsive layout and content components that you can use to quickly spin up a landing page, event site, or other web experience. Capture visitor information and send it directly to the Lead object with the Lead Form component.

Included Features

- Experience Builder example design and components
- Ability to route lead information directly to the Leads object
- Ability to send contact information directly to Marketing Cloud data extensions
- Access to the LWR framework
- Direct connection to Salesforce CMS to pull in CMS content

Note: You must be an Experience Cloud customer to access the Microsite template.

Advanced Features That You Can Configure

- Pre-built and custom components. Check out the full list of compatible components you can use to build out your LWR site at Standard Components for LWR Templates on page 177.
- A quick start repository with sample component code. Use the example code to create and customize your own components. To access the repository, see Experience Cloud Microsite Samples.

Microsite Use Case

When your company is hosting an event, you need a place to keep all your event information that doesn't necessarily live with your other content. Enter microsites. Publish your page with all the event information, pull in logos and other content that you created in CMS, and archive the page when the event is over.

When you want to promote a specific product or opportunity, consider using a microsite to host your content. You can choose to associate the URL with your full company website, or create a new, dedicated domain.

Included Components

The Microsite template includes these components.

- Lead Form
- Marketing Cloud Form
- Header
- Banner
- All components included with the BYO (LWR) template: Standard Components for LWR Templates on page 177

Create Special Purpose Websites with Microsites

Microsites are useful for everything from event pages to lightweight websites. Using the Microsite template, you can create a site with built-in navigation and layout components that are responsive and easy to customize.

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Microsites are useful for everything from event pages to lightweight websites. Using the Microsite template, you can create a site with built-in navigation and layout components that are responsive and easy to customize.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

Before You Begin

Microsites are high-performance websites often designed for specific opportunities and singular use cases. Before you start designing your microsite, we recommend that you keep these things in mind.

- The Microsite template offers limited support for standard components. For a list of supported components, see Standard Components for LWR Templates on page 177.
- To achieve the best possible performance at scale, we recommend serving microsites from a content delivery network (CDN). For more information about the Experience Cloud CDN, see Serve Your Experience Cloud Site with the Salesforce Content Delivery Network (CDN).
- Keep in mind the possible scale of your use case. Microsites have an upper limit of 12,000 concurrent lead form submissions per minute. If you're worried about exceeding this limit, reach out to your account executive.

Create a Microsite

Create your microsite using the Microsite template and customize the existing components to fit your company needs. Microsites run on the Lightning Web Runtime (LWR) platform so you can create beautiful, efficient websites.

Configure Microsite Layout and Create Navigation

The Header component, included with the Microsite template, includes theme settings and built-in navigation.

How Do Experience Cloud Forms Connect to Marketing Cloud?

Using the Marketing Cloud Form component, you can connect your microsites to Marketing Cloud data extensions. User contact information is gathered from your Experience Cloud sites and then sent to Marketing Cloud. The data that is collected from your site is momentarily stored in the Salesforce Core infrastructure and then sent to your Marketing Cloud instance. The data transferred this way is only stored in Salesforce Core infrastructure for as long as it takes to call the Marketing Cloud API.

Connect the Marketing Cloud Form Component to Marketing Cloud

Create Marketing Cloud data extensions from your Experience Cloud sites with one click. Using the Marketing Cloud Form component, you can capture customer information from your microsites and send it directly to Marketing Cloud. Built on the powerful LWR platform, the Marketing Cloud Form component gives you the tools to easily collect contact information and the flexibility to store data where it best serves your company.

Send Visitor Information to the Salesforce Lead Object

Use the Lead Form component in the Microsite template to capture visitor information in your site and create a new Lead record in Salesforce.

Capture Visitor Information with the Lead Form Component

After you finish setting up your Guest User profile and configuring the correct object access, navigate to Experience Builder to configure the Lead Form component.

Create a Microsite

Create your microsite using the Microsite template and customize the existing components to fit your company needs. Microsites run on the Lightning Web Runtime (LWR) platform so you can create beautiful, efficient websites.

Note: You must be an Experience Cloud customer to access the Microsite template.

1. From **Setup**, in the Quick Find box, enter `Experiences`, and then under **Digital Experiences**, select **All Sites**.

   Note: If you're just getting started with Experience Cloud and you've never created a site, see Set Up an Experience Cloud Site.

2. Select **New**.
3. Choose the Microsite template and click **Get Started**.
4. Name your microsite and provide a URL.

   Note: You can associate the URL with your primary website URL, or create an entirely separate URL.

5. Choose whether you want Unauthenticated or Authenticated access.

   Note: To use the Lead Form component to capture leads and store them in Salesforce as Lead records, guest users must have access to your site. If you plan on using this functionality, we suggest that you choose the unauthenticated access option. For more information on giving guest users access to your site, see Give Secure Access to Unauthenticated Users with the Guest User Profile.

6. Click **Create**.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Configure Microsite Layout and Create Navigation

The Header component, included with the Microsite template, includes theme settings and built-in navigation.

1. To customize the header, select the **Theme** menu.
2. Select **Theme Settings**.

   Show fixed header displays the Fixed Header component, which remains fixed at the top of the screen when your users scroll. You can also choose to fix the primary header by selecting **Fix theme header**, which gives your users access to the menu and navigation as they scroll.
3. Choose which headers to show and then select the component to configure the display.
4. To add navigation to the Header component, select the **Settings** menu.
5. Choose **Navigation** and select **Add Navigation Menu**.
6. From the Menu Editor dialog you can create menu items and choose where to link to. Drag and drop your items and choose how to display them by selecting the Header component.

SEE ALSO:

Developer Documentation: Create Components for LWR Sites

Developer Documentation: Create Custom Layout Components

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To customize an Experience Cloud site:

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- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

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  OR
- Be a member of the site AND an experience admin or publisher in that site

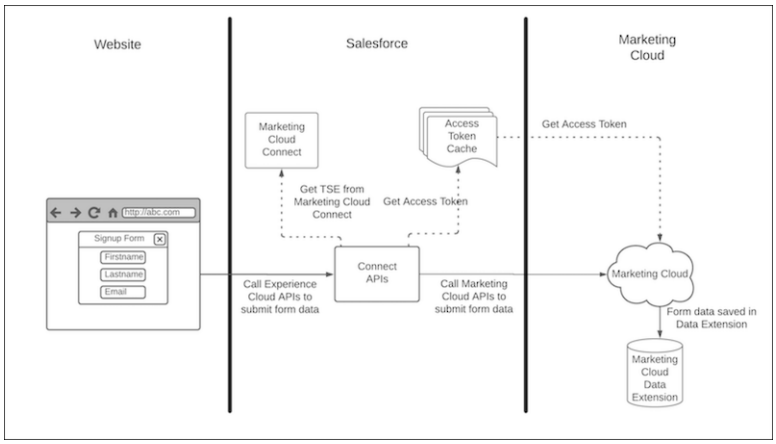
How Do Experience Cloud Forms Connect to Marketing Cloud?

Using the Marketing Cloud Form component, you can connect your microsites to Marketing Cloud data extensions. User contact information is gathered from your Experience Cloud sites and then sent to Marketing Cloud. The data that is collected from your site is momentarily stored in the Salesforce Core infrastructure and then sent to your Marketing Cloud instance. The data transferred this way is only stored in Salesforce Core infrastructure for as long as it takes to call the Marketing Cloud API.

Your microsite runs on Experience Cloud, but the data is stored and resides in Marketing Cloud. In order to access, manage, or delete this data, you must follow the Marketing Cloud Deletion process. For more information, see the Salesforce Trust and Compliance Documentation for both Salesforce Services and Marketing Cloud.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.



SEE ALSO:

Connect the Marketing Cloud Form Component to Marketing Cloud

Connect the Marketing Cloud Form Component to Marketing Cloud

Create Marketing Cloud data extensions from your Experience Cloud sites with one click. Using the Marketing Cloud Form component, you can capture customer information from your microsites and send it directly to Marketing Cloud. Built on the powerful LWR platform, the Marketing Cloud Form component gives you the tools to easily collect contact information and the flexibility to store data where it best serves your company.

Before you can send contact information directly to Marketing Cloud data extensions, you must complete these setup items.

1. **Confirm that Marketing Cloud Connect is installed in Salesforce.** Marketing Cloud Connect integrates data from the Marketing Cloud Form component to Marketing Cloud.
   a. From Setup, in the Quick Find box, enter `Installed Packages`, and then select **Installed Packages**.
   b. Under Installed Packages, look for the Marketing Cloud Package.
   c. If you see that the package is installed, skip to Step 9.
2. **Install Marketing Cloud Connect in Salesforce.** After you confirm that Marketing Cloud Connect isn't installed, go to the Marketing Cloud documentation to find the package and get started.
   a. Review the Marketing Cloud Connect Documentation, including Prerequisites and Review Marketing Cloud Connect User Types and Permissions.
   b. To install the Marketing Cloud Connect Managed Package in Salesforce, choose to install your package in production or in a sandbox.

      Note: Make sure that you're using the latest version of a supported web browser

   c. Log in to your Salesforce account using your admin credentials and select **Install for Admins Only.**
   d. Click **Install**. If prompted, grant access to third-party websites.
   e. Click **Continue**.

      Note: Confirm that the managed package installation is complete before moving on to the next step.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

3. **Configure page layouts.** After your package is fully installed, provide field access to your admin and your Site Builder users.
   a. From Setup, in the Quick Find box, enter `Page Layouts`, and then select **Page Layouts**.
   b. Navigate to User Page Layouts and open the User Layout.
   c. Drag the **Marketing Cloud for AppExchange User** and **Marketing Cloud for AppExchange AdminUser** fields to the **Additional Information** section of the user page layout.
   d. To give your admin user, or the user who's setting up Marketing Cloud Connect, and your Site Builder users the necessary field permissions, navigate to Users in Salesforce Setup.
   e. Find your admin user and click **Edit**.
   f. Under General Information, select the boxes for **Marketing Cloud for AppExchange User** and **Marketing Cloud for AppExchange Admin**.
   g. Edit your Site Builder users, and select **Marketing Cloud for AppExchange User**.

4. **Define process automation settings.** Allow the managed package wizard to configure workflow rules by providing a Default Workflow user with the correct permissions.
   a. From Setup, in the Quick Find box, enter `Process Automation`, and then select **Process Automation Settings**.
   b. Find the **Default Workflow User** field.
   c. If **Default Workflow User** is empty, select the lookup icon and choose a user with system admin permissions to be the default workflow user.
   d. Save your changes.
5. **Confirm and save your session settings.** Session settings allow the managed packed wizard to add IP allowlisting.
   a. From Setup, in the Quick Find box, enter `Session Settings`, and then select **Session Settings**.
   b. Scroll to the bottom of the page. You don't change any settings. But if you omit this step, the managed package wizard is unable to add IP allowlisting, which then requires you to add 20 or more IP ranges manually.
   c. Save your changes.
6. **Connect your accounts using the Marketing Cloud Connect Setup Wizard.** Now that you have the basic requirements, you can use the setup wizard. Several of the steps ask for confirmation that you completed earlier steps, so make sure not to skip steps two through five.
   a. If you're using Lightning Experience, switch to Salesforce Classic.
   b. From the navigation bar, select the plus icon to navigate to the All Tabs screen.
   c. Select **Marketing Cloud**.
   d. Click **Verify Remote Site**.
   e. From the MetadataAPI dialog, select **Okay**.
   f. To begin the setup wizard, click **Start Wizard**.
   g. The next screen is a prompt for the Default Workflow User you created. Click **Next**.
   h. To move forward and acknowledge you've saved the Session Security Settings, click **Next**.
   i. To acknowledge Field-Level Security information, click **Next**.
   j. To acknowledge the page layout update information, click **Done**.
   k. To acknowledge the automated changes, at the main Marketing Cloud Connector Setup screen, select **I agree**, and then click **Configure Marketing Cloud Connector**.
   l. After you complete all the steps, you're rewarded with a configuration summary.
   m. To finish the setup wizard, click **Okay!**
7. **Create your Marketing Cloud Connect API user.** Marketing Cloud requires a user account for its connection to the Salesforce environment, so you can dedicate a user license to this purpose. Create your Marketing Cloud Connect API user and give them the appropriate roles.
   a. In Marketing Cloud, hover over your username and select **Setup**.
   b. From Setup, in the Quick find box, enter `Users`, and then click **Users**.
   c. Click **Create**.
   d. Enter your email address for **Reply Email** and **Notification Email Address**.
   e. Enter a unique username, for example `MC-API-User`.
   f. Leave the External Key field blank, unless your org requires it.

   g. Select a time zone and a culture code.
   h. Select API User.
   i. Create a temporary password.
   j. Save your changes.
   k. From the Users screen, select the checkbox next to the user that you just created.
   l. Click **Manage Roles**.
   m. Click **Edit Roles**.
   n. Assign the roles Administrator (if available for your account) and Marketing Cloud Administrator.
   o. Save your work.
   p. Log out of Marketing Cloud.

8. **Connect to Marketing Cloud from Salesforce.** After finishing your setup in Marketing Cloud, hop back over to your primary Salesforce org to finish user setup. Make sure you're logged out of Marketing Cloud before you begin.
   a. From Salesforce Classic, click the plus icon to navigate to the All Tabs screen.
   b. Click **Marketing Cloud**.
   c. Click **Connect to Marketing Cloud**.
   d. Enter the username and password for the Marketing Cloud API User and log in.
   e. After you complete the steps, you see the Marketing Cloud Connector Settings page. Step 9 involves setup tasks from this page.

9. **Check the Marketing Cloud Connector settings.** From the Marketing Cloud Connector Settings page you can verify your API User info and confirm endpoint settings.
   a. To get to the Marketing Cloud Connector Settings page, go to Salesforce Setup in Classic mode and add `/apex/marketingcloudsettings` to the end of the url. If you just completed step 8 you can skip this.
   b. Make sure that the API User Username and MID are correct.
   c. Scroll down to **Advanced** and turn on **Tenant Specific OAuth Endpoints** if they aren't on.

10. **In Marketing Cloud, check the Experience Cloud Marketing Form installation.** The last step in the installation process is to confirm that your package is installed.
    a. From Marketing Cloud, navigate to the Setup menu. In the Quick Find box, enter `Installed Packages` and select **Installed Packages**.
    b. Find the Experience Cloud Marketing Form package.
    c. If the package doesn't appear in the list, contact your Account Representative to get the package provisioned for your account.

11. **Test in Experience Cloud.** Your Marketing Cloud Form component is available and ready for testing. Go to Experience Builder for one last test.
    a. Create a site using the Microsite (LWR) template.
    b. To allow guest users to submit the form, go to Experience Workspaces and select the **Administration** tile. Choose **Preferences** and select **Allow guest user to access public APIs**.
    c. Access Experience Builder and drag the Marketing Cloud Form component to your canvas.
    d. Enter your Marketing Cloud MID, and the name of the data extension that you want to create.
    e. Click **Create Data Extension**.

f. You're ready to start gathering contact info.

SEE ALSO:

How Do Experience Cloud Forms Connect to Marketing Cloud?

Send Visitor Information to the Salesforce Lead Object

Use the Lead Form component in the Microsite template to capture visitor information in your site and create a new Lead record in Salesforce.

Note: The Lead Form component is designed to collect information from guest users. It can't be used for authenticated users.

1. To allow your site to access the proper access to the Leads object, navigate to Workspaces and select the Administration tile.
2. Select **Preferences**.
3. Under **General**, select **Allow guest users to access public APIs** and click **Save**.
4. Navigate back to Experience Builder and select **Settings**.
5. Under **Guest User Profile**, select the link with your site name.
6. From the example profile, select **Edit**.
7. Under **Standard Object Permissions**, select **Read** and **Create** next to the Leads object.
8. Click **Save**.
9. Under **Field Level Security**, select a field and allow access to the fields you intend to capture.
10. Save your work.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Capture Visitor Information with the Lead Form Component

After you finish setting up your Guest User profile and configuring the correct object access, navigate to Experience Builder to configure the Lead Form component.

1. From your Experience Builder canvas, select the Lead Form component.
2. Decide which fields you want displayed on your form.

   Note: There are several required fields on the Lead object, including Last Name and Company. If you don't want to display these fields on your form, uncheck **Show field** and enter a default value.

3. Choose to display standard fields, like Last Name, and add other Lead fields using the Custom Field sections.
4. To gather information from the form without displaying the field, use a custom field and under **Select an Input Type**, choose **Hidden**.

   Note: We strongly recommend that you avoid collecting and storing sensitive information in a hidden field. It's possible for users to intercept and potentially change field information during data transfer.

Limitations and Behavior

- Keep in mind the possible scale of your use case. Microsites have an upper limit of 12,000 concurrent lead form submissions per minute. If you're worried about exceeding this limit, reach out to your account executive.
- The **Show Field** option determines whether a field displays on, and collects information from, the form. In contrast, hidden fields allow you to hide a field but still capture data. If you select **Hidden**, the form ignores **Show field** and hides the field.
- Hidden fields capture the default value, unless you map to a standard field that exists on the form, such as Email. If you map to an existing field with a hidden field and another standard field, the visitor entered data is collected and the default value is ignored.
- If multiple custom fields map to the same field on the Lead object, the last field collected is the field that is stored in the record. To avoid confusion, we recommend mapping each custom field to a unique field on the Lead object.
- Certain default values require specific formatting. If you plan to map a custom field to a date, dateTime, multiple picklists, or reference field, use these formatting instructions.
  - Date: `2020-09-07`
  - DateTime: `2020-09-07T00:00:00Z`
  - MultiplePicklist: `A;B;C`
  - Reference: Valid ID

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates

Check out the list of all the objects supported by out-of-the-box components and pages in Experience Builder templates.

When we talk about supported objects in templates, we mean that you can use our out-of-the-box components on the object pages, as detailed here.API names are indicated in parentheses.

	• Headline • Record Banner • Record Detail • Record Information Tabs • Related Records	• Navigation Menu • Object Home Page	• Create Record Button • Create Record Form
Account (Account)	✅	✅	✅
Activity History (ActivityHistory)	✅		
Address (Address)	✅		
Approval History (ProcessInstanceHistory)	✅		
Approval Process Work Item (ProcessInstanceWorkItem)	✅		
Approval Step (ProcessInstanceStep)	✅		
Asset (Asset)	✅	✅	✅
Asset Relationship (Asset Relationship)	✅		
Assigned Resource (AssignedResource)	✅		
Associated Location (AssociatedLocation)	✅		
Calendar (Calendar)	✅		
Campaign (Campaign)	✅	✅	✅
Campaign Member (CampaignMember)	✅	✅	
Case (Case)	✅	✅	✅
Channel Program (ChannelProgram)	✅	✅	
Channel Program Level (ChannelProgramLevel)	✅	✅	
Channel Program Member (ChannelProgramMember)	✅		
Contact (Contact)	✅	✅	✅
Contract (Contract)	✅	✅	✅
Custom Objects	✅	✅	✅

	• Headline • Record Banner • Record Detail • Record Information Tabs • Related Records	• Navigation Menu • Object Home Page	• Create Record Button • Create Record Form
Dashboard (Dashboard)	✔	✔	
Email Message (EmailMessage)	✔		
Event (Event)	✔		✔
External Objects	✔	✔	✔
Flow Orchestration Work Item (FlowOrchestrationWorkItem)		✔	
Group (CollaborationGroup)	✔	✔	✔
Lead (Lead)	✔	✔	✔
List Email (ListEmail)	✔	✔	✔
Location (Location)	✔	✔	✔
Maintenance Asset (MaintenanceAsset)	✔		
Maintenance Plan (MaintenancePlan)	✔	✔	✔
Note (Note and NoteAndAttachment)	✔		✔
Open Activity (OpenActivity)	✔		
Operating Hours (OperatingHours)	✔	✔	✔
Opportunity (Opportunity)	✔	✔	✔
Opportunity Contact Role (OpportunityContactRole)	✔		
Opportunity Product (OpportunityLineItem)	✔		
Opportunity Team Member (OpportunityTeamMember)	✔		
Order (Order)	✔	✔	✔
Partner Fund Allocation (PartnerFundAllocation)	✔	✔	

	• Headline • Record Banner • Record Detail • Record Information Tabs • Related Records	• Navigation Menu • Object Home Page	• Create Record Button • Create Record Form
Partner Fund Claim (PartnerFundClaim)	✅	✅	
Partner Fund Request (PartnerFundRequest)	✅	✅	
Partner Marketing Budget (PartnerMarketingBudget)	✅	✅	
Price Book (Pricebook2)	✅	✅	
Price Book Entry (PricebookEntry)	✅		
Product (Product2)	✅	✅	
Product Consumed (ProductConsumed)	✅		
Product Item (ProductItem)	✅	✅	✅
Product Item Transaction (ProductItemTransaction)	✅		
Product Request (ProductRequest)	✅	✅	✅
Product Request Line Item (ProductRequestLineItem)	✅	✅	✅
Product Required (ProductRequired)	✅		
Product Transfer (ProductTransfer)	✅	✅	✅
Quote (Quote)	✅	✅	
Quote Line Item (QuoteLineItem)	✅		
Report (Report)	✅	✅	
Resource Absence (ResourceAbsence)	✅		
Resource Preference (ResourcePreference)	✅		

	• Headline • Record Banner • Record Detail • Record Information Tabs • Related Records	• Navigation Menu • Object Home Page	• Create Record Button • Create Record Form
Return Order (ReturnOrder)	✅	✅	✅
Return Order Line Item (ReturnOrderLineItem)	✅		
Service Appointment (ServiceAppointments)	✅		
Service Contract (ServiceContract)	✅	✅	✅
Service Contract Line Item (ServiceContractLineItem)	✅		
Service Crew (ServiceCrew)	✅	✅	✅
Service Crew Member (ServiceCrewMember)	✅	✅	✅
Service Report (ServiceReport)	✅		
Service Resource (ServiceResource)	✅	✅	✅
Service Resource Capacity (ServiceResourceCapacity)	✅		
Service Resource Skill (ServiceResourceSkill)	✅		
Service Territory (ServiceTerritory)	✅	✅	✅
Service Territory Location (ServiceTerritoryLocation)	✅		
Service Territory Member (ServiceTerritoryMember)	✅		
Shipment (Shipment)	✅	✅	✅
Skill Requirement (SkillRequirement)	✅		
Shared Contacts (AccountContactRelationship)	✅		
Task (Task)	✅	✅	✅

	• Headline • Record Banner • Record Detail • Record Information Tabs • Related Records	• Navigation Menu • Object Home Page	• Create Record Button • Create Record Form
Time Sheet (TimeSheet)	✅	✅	✅
Time Sheet Entry (TimeSheetEntry)	✅		
Time Slot (TimeSlot)	✅		
User (User)	✅		
Work Order (WorkOrder)	✅	✅	✅
Work Order Line Item (WorkOrderLineItem)	✅		
Work Type (WorkType)	✅	✅	✅

Note: To be searchable in Experience Cloud sites, objects must be searchable in Lightning Experience and supported in templates.

Change Your Experience Cloud Site Template

If you use the Salesforce Tabs + Visualforce template, you can change your template to an Aura template or any installed Lightning Bolt Solution in Experience Builder. Changing templates isn't available in LWR sites.

Note:

- Apart from the Help Center template, we don't recommend changing from one Experience Builder template to another. So for example, avoid changing from a Customer Service template to a Partner Central template. Although the functionality is available for these templates, we recommend that you start afresh with a new template instead. If you do change from one template to another and lose your customizations, Salesforce Customer Support is unable to assist you.

Important: There's no data loss when you change templates, but all customizations are lost. Be sure to review Considerations for Changing Your Template before changing your template.

1. Open Experience Workspaces.
2. Click **Administration** > **Settings**.
3. Click **Change Template**. A message warns you that changing your site s template permanently deletes all existing customizations and pages.
4. Choose the template you want to switch to.
5. When prompted, select **Change Template** to confirm your changes.

After you change the template, you're taken back to Experience Workspaces.

Check to make sure your site pages, such as the Login page or Home page, are still the best choice for your updated site template. For example, if you previously had a Salesforce Tabs + Visualforce template and switch to the Customer Service template, update your pages to use Experience Builder pages instead of Visualforce pages. If necessary, customize your site in Experience Builder and publish any changes you make.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Considerations for Changing Your Template

Changing your template affects site navigation, branding, and customizations.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note:

- Apart from the Help Center template, we don't recommend changing from one Experience Builder template to another. So for example, avoid changing from a Customer Service template to a Partner Central template. Although the functionality is available for these templates, we recommend that you start afresh with a new template instead. If you do change from one template to another and lose your customizations, Salesforce Customer Support is unable to assist you.

- When you change your template, Salesforce object data carries over, but branding and component customizations don't. As a result, you must reconfigure any customizations in the new template.
- Changing the template updates the available options in Experience Workspaces. To view all available options regardless of template selection, select **Administration** > **Preferences** > **Show all settings in Workspaces**.
- Your Experience Cloud site URL changes when switching from a Salesforce Tabs + Visualforce template to any other template type. Specifically, `/s` is appended to the site URL. Be sure to update any links to your site with the updated URL.
- In active Experience Cloud sites:
  - When you switch to an Aura template, your template change is saved in a draft version. Use the draft version to further customize your site in Experience Builder. Your site is updated only after you publish your changes.
  - When you switch to the Salesforce Tabs + Visualforce template from any other template, your changes immediately reflect in your active site. In this scenario, we recommend that you deactivate your site before you change your template. After you've made all your changes, reactivate the site.
  - If your template is listed as `None`, then you're not using a predefined template or you're using a modified version of one.
- After importing a B2B Commerce template, the My Account and Lists options on navigation menus, such as the Customizable User Profile Menu, require some follow-up. Edit the menu and reconnect these options with their pages.
- Template changes aren't supported in Lightning Web Runtime (LWR) templates.

Considerations Before You Migrate an Aura Site to Lightning Web Runtime (LWR)

Sites that run on Lightning Web Runtime (LWR) boast increased speed, scalability, security, and design flexibility over Aura sites. Migrating your Aura site to an LWR site requires considerable planning. Keep these considerations in mind.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

General

- Unlike Aura templates, which have specific components for specific site functions, LWR templates provide more general components that use concepts like data binding to achieve the same goals, but faster and more dynamically.

Custom Aura Components

- Identify any custom Aura components on your site, and replace them with Lightning web components (LWCs).
  - When building LWCs, use new LWC features such as @slot, responsive properties, and custom property editors.
  - Use data binding to show CRM data and CMS content on the site, where possible, instead of wires or Apex controllers.
- See Learn Experience Cloud and Github for LWCs you can use for reference.

Object and Site Pages

- We recommend that you use the same base URL for object pages in the LWR site that mirror existing object pages in the Aura site. For example, if you have an existing page in your Aura site like `www.company.com/s/account/123456789/account-name`, we recommend that you give the object page in LWR a base URL of `/account`. Using the same base URL makes it easier for you to set up redirects later.
- We recommend that you use the same base URL in the LWR site that mirrors existing site pages in the Aura site. For example, if you have an existing Builder page like `www.company.com/s/my-custom-page`, use `/my-custom-page` as the base URL in your LWR site.
- Replace your Aura page layouts with flexible page layouts in LWR.

Custom Domains and Custom URL

Let's say that your Aura site URL uses a custom domain like `www.company.com/s` or a Salesforce domain like `company.my.site.com/s/`, and the same domain serves the new LWR site, but without the /s/.

- Create the LWR site without /s/.
- Before go-live, set the LWR site to use `company.my.site.com/path` so that you can test redirects.
- At go-live, delete the Aura site's custom URL. In Setup, create a custom URL for the new LWR site that uses the custom domain.
  - To keep the old Aura site to serve content that you can't render in LWR yet, add a new custom URL for the Aura site with a path such as `/archive`.

Topics

- If your Aura site uses topics and topic assignments with custom object records, replace the topics and topic assignments with custom objects such as *`Topic__c`* and *`Topic_Assignment__c`*.
  - To drive sharing, consider setting up a master-detail relationship between *`Topic_Assignment__c`* and topic, and consider setting up lookup relationships to other objects for topic assignments
- To drive sharing with site users, if needed, consider adding custom fields like a Site Identifier picklist field on the *`Topic__c`* object.
- Grant the proper object permissions to the *`Topic__c`* and *`Topic_Assignment__c`* objects for the LWR site guest user.
- Create guest sharing rules to share the right Topic__c records with the guest user record. If *`Topic_Assignment__c`* records have a master-detail relationship to *`Topic__c`*, *`Topic_Assignment__c`* records are also visible.

Record Data Extract, Transform, and Load (ETL)

- Topics and Topic Assignments
  - Export all topics and topic assignments for objects that are currently in use on the Aura site.
  - Import topics into the new custom object *`Topic__c`*.

  - Import Topic Assignments into the new custom object `Topic_Assignment__c`, relating the new `Topic__c` record with the `EntityId` that the topic assignment was related to

- Records Containing URL Fields
  - Export records with the URL fields.
  - Locally update the URL field values with the new site URL. Import the file back into the org to update the records.

User Sharing and Permissions

- Guest Users
  - A new guest user is automatically created when you create an LWR site. Review the profile permissions and permission set assignments for the Aura site guest user, and carry over any necessary configuration to the LWR site guest user.
  - If there are existing, and still needed, guest user sharing rules in place for the Aura site's guest user, duplicate them for the LWR site's guest user.

- Authenticated Users
  - Any existing sharing mechanisms for authenticated users are carried over from the Aura site to the LWR site.
  - Create sharing mechanisms for any new custom objects or components that you created for the new LWR site.
  - Any existing profile, permission set, and permission set assignments are carried over from the Aura site to the LWR site.

CSS

- Any CSS overrides that target standard markup in Aura don't apply to markup in LWR. You must update the CSS style sheets.
- There's no dedicated CSS editor at the site-level for LWR sites. Add your CSS directly in the head markup. Components on LWR sites have a CSS Class section on the Style tab, where you can add a CSS class at the component level.
- If the style sheet is a file that's part of an archive (.zip), the markup is
  - ```
    <link type="text/css" rel="stylesheet" href="{ basePath }/resource/<apiName>/<stylesheetFileName>.css?{ versionKey }" />
    ```
- If the style sheet is the only file uploaded directly as a static resource, and not part of an archive (.zip), the markup is
  - ```
    <link type="text/css" rel="stylesheet" href="{ basePath }/resource/<apiName>?{ versionKey }" />
    ```
- Test and confirm that CSS in LWCs works properly.
- Design tokens in LWR sites differ from the ones in Aura sites. To update the tokens used in your components and style sheets, refer to the –dxp styling hooks documentation.

Google Analytics and Other Head Markup Scripts and Style sheets

- Google Analytics
  - If you're using the standard integration for Google Analytics, you must reconfigure it in LWR. As long as the LWR site is using the Aura site's domain name, you can use the same Google Analytics ID.
  - If you're using a script in the head markup, paste the script to the LWR site. As long as the LWR site is using the Aura site's domain name, the script works.

- Style sheets and Other Static Resources

  - Include any style sheets, JavaScript files, or other static resources in the head markup of the LWR site.

Sitemap and Snapshot Generation

- Sitemaps and snapshots are generated with the `my.site.com` domain, which means that you can test them before migrating the custom domain from the Aura to LWR site. To minimize SEO impact, make sure that sitemaps and snapshots are populated properly.
- Consider placing a redirect from `/s/sitemap.xml` to `/sitemap.xml`. That way, you can redirect any sitemap submissions that you have to the new sitemap without updating them everywhere.

File Asset Images

- f you're referencing any file assets as `/file-asset/<fileAssetAPIName>`, you must update them to `/sfsites/c/file-asset/<fileAssetAPIName>`.

CMS

- With Winter '24, you can publish content from all CMS workspaces to LWR sites.
- There are no CMS components in LWR sites. Use data binding to show CMS content in LWR sites.

Redirects

Consider adding these redirects (in CSV format).

- /s, / and /s/, /: Redirects the Aura home page URL to the LWR home page URL.
- /s/sitemap.xml, /sitemap.xml: Redirects the Aura sitemap URL to the LWR sitemap URL, rather than resubmitting to search engine crawlers.
- /s/(customPage), /(customPage): Catches all pages to redirect one-level pages to their equivalent one-level pages in LWR.
- /s/article/(articleAlias), /article/(articleAlias): Knowledge article redirect./s/contact/(contactId), /contact/(contactId): Object detail page redirect. (Here, contact is used as an example, but the same structure can be applied to any standard or custom object.)
- External URL redirects aren't supported. If you need an external URL redirect, set up a solution that redirects to a Visualforce page, which in turn redirects externally.

Multilingual Sites

- The new LWR language URL construct is a path rather than a query parameter, as it is in Aura. See Create a Multilingual LWR Site.

Visualforce Pages

- If you run any Visualforce pages in your Aura site, such as custom robots.txt files, custom sitemaps, or other custom Visualforce pages, note the difference in URL structure between Aura and LWR for running Visualforce pages.
- In Aura, the site is served behind the /s path, and Visualforce pages are served one level higher.
  - Example: Aura site at `mycompany.my.site.com/helpcenter/s/` would serve Visualforce pages from `mycompany.my.site.com/helpcenter/apex/myVisualforcePage`.
  - Example: Aura site at `helpcenter.mycompany.com/s/` would serve Visualforce pages from `helpcenter.mycompany.com/apex/myVisualforcePage`.

- LWR sites are served at the root right after the site path, if any, and Visualforce pages are served from a path that is automatically created as a default for that site. The automatically created path for Visualforce pages is a combination of the site's path + "vforcesite". You can customize and modify this path from the Custom URLs section in Setup, if necessary.
  - Example: LWR site at `mycompany.my.site.com/helpcenter/` would serve Visualforce pages from `mycompany.my.site.com/helpcenter/helpcentervforcesite`.
  - Example: LWR site at `helpcenter.mycompany.com` would serve Visualforce pages from `helpcenter.mycompany.com/vforcesite`.

Mobile Publisher Apps

- Mobile Publisher offers beta support for LWR sites.
  - The Playground app allows LWR sites with or without "/s"
  - Check out LWR (Beta) Limitations
- We strongly recommend that you test your app in the Playground app before creating and requesting a beta app.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

SEE ALSO:

B2B Commerce Aura to LWR Migration Guide

Migrate a Koa or Kokua Site to a New Template

The Koa and Kokua templates are retired, and you can no longer use them to create site. Salesforce supports existing sites built with Koa and Kokua, but we recommend migrating to newer templates. The new templates provide richer support for Salesforce Knowledge and case management, and they also receive updates and new features with each release.

Migration Options

Because your Koa and Kokua sites aren't using the latest Lightning technology, we recommend creating a new site. A new site reflects the most recent innovations and features.

You can choose to migrate your site using the **Change Template** button from **Workspaces** > **Administration**. If you do, the migrated version won't reflect all the innovations made to the product.

To determine which template is right for your use case, check out Which Experience Cloud Template Should I Use?. Also think about what you envision for the future. If your use case is strictly a help forum, consider using the Help Center template. Otherwise, consider the Customer Account Portal as an option.

Note: Always test your implementation first in a sandbox before publishing your new site. See Deploy an Experience Cloud Site from Sandbox to Production.

Your Koa or Kokua site allows you to expose your Salesforce Knowledge implementation to the world while giving users the chance to file cases. The Customer Service template lets you do both. But it also lets you do other things, such as add Chat capabilities or the potential for customers to edit their cases. If the Customer Service template's extra features are more than you need, you can remove unnecessary pages and components.

Filtering in Searches

Koa and Kokua searches allow users to filter by article type and category. These filtering options are only available in the Koa and Kokua templates. However, you can scope searches to specific topics and see all articles associated with that topic. You can also look for search components created by trusted Salesforce partners and distributed via AppExchange.

Data Categories Versus Topics

Your Koa or Koa site uses your Salesforce Knowledge setup and data categories to organize content. The Customer Service template also uses Salesforce Knowledge in the back end to organize content, but in the site, content is organized using topics. You can map the articles in your data categories to topics in a site.

To map articles to topics automatically:

1. Select **Experience Workspaces** > **Content Targeting** > **Automatic Topic Assignment**.
2. Enable **Automatic Topic Assignment**.
3. Map topics to data category groups and data categories. You can choose to add the topics to all existing articles and articles added in the future.

Because data categories aren't the primary content organization scheme in the Customer Service template, you can't use the following components.

- Article Type Filter
- Category Filter
- Category Navigation
- Expanded Category Navigation
- Featured Data Categories
- Featured Search
- Trending Articles

You can map your exact hierarchy from data categories to topics, up to eight levels of depth.

Data Category Permissions

Thoroughly check the data category permissions for all profiles accessing your newly built site. If you add new profiles and users to your site, check that all the articles' data categories are set to the right permissions for your users. In particular, check the permission on the guest user profile for each site.

Viewing Articles

The Article Listview and Article Home components are only supported in the Koa and Kokua templates. Use the Top Articles by Topic component for a list view in a Customer Service community. When you click a topic in the Top Articles by Topic component, you see the topic detail page with a list of articles for that topic.

Left-Hand Navigation

Use custom themes to replicate the left-hand navigation scheme seen in the Koa and Kokua templates.

New URL

Your new site's URL is different from your old Koa or Kokua URL. Give your customers a smooth transition from one to the next by following these steps.

1. In your Koa or Kokua site, select **Workspaces** > **Administration**.
2. Click the pencil button, and change the site's URL.
3. Click **Save**.
4. In your new site, select **Workspaces** > **Administration**.
5. Click the pencil button, and change the community's URL so that it matches your old URL.
6. To handle bookmarked articles, consider rewriting your site URLs.

Important: Change the URL only after testing that your new site works just as you want it to.

Which Components Can I Use with Each Aura Template?

Aura site templates, such as Customer Service and Partner Central, are each composed of pages, which in turn are made up of customizable components. Consult this table to find out which Aura template each component can be used in, and when the component became available.

Tip: The components panel in Experience Builder lists all components that you can add to the page you're editing.

Sites built with Salesforce Tabs + Visualforce don't use Lightning components.

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Account Brand Details		✓	✓		✓	Summer '19 and later
Activities	✓	✓	✓		✓	
Announcement Section	✓	✓	✓		✓	Winter '16 and later
Article Content	✓	✓	✓		✓	All versions
Articles with This Topic	✓	✓	✓	✓	✓	
Ask Button	✓	✓			✓	All versions
Breadcrumb	✓	✓	✓	✓	✓	All versions
Calendar				✓	✓	All versions
Campaign Marketplace	✓	✓	✓	✓	✓	All versions
Case Comments Publisher	✓				✓	All versions
Case Deflection	✓	✓	✓	✓	✓	Spring '18 and later
CMS Collection	✓	✓	✓	✓	✓	Winter '19 and later
CMS Connect (HTML)	✓	✓	✓	✓	✓	All versions
CMS Connect (JSON)	✓	✓	✓	✓	✓	All versions
CMS Single Item on page 232	✓	✓	✓	✓	✓	Winter '19 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
CMS Single Item (Detail) on page 233	✔	✔	✔	✔	✔	Winter '19 and later
Calendar	✔	✔	✔		✔	All versions
Contact Request Button & Flow	✔	✔	✔		✔	Spring '19 and later
Contact Support Button	✔	✔	✔	✔	✔	All versions
Contact Support & Ask Buttons[1]	✔				✔	Winter '16 and later
Contact Support Form	✔	✔	✔	✔	✔	Spring '18 and later
Create Case Form	✔	✔	✔		✔	All versions
Create Record Button	✔	✔	✔		✔	Winter '16 and later
Create Record Form	✔	✔	✔		✔	Winter '16 and later
Custom Lightning Components	✔	✔	✔	✔	✔	Winter '16 and later
Customizable User Settings	✔	✔	✔		✔	Summer '19 and later
Dashboard	✔	✔	✔		✔	Winter '16 and later
Dashboard List	✔	✔	✔		✔	Winter '16 and later
Deflection Tracking	✔*	✔†	✔†	✔†	✔*	* Spring '19 and later † Summer '19 and later
CRM Analytics Dashboard	✔	✔	✔		✔	Summer '17 and later
Einstein Predictions	✔	✔	✔		✔	Winter '20 and later

[1] Contact Support is included as part of the Contact Support & Ask Buttons component.

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Einstein Scoring		✓			✓	Summer '23 and later
Engagement	✓		✓			Winter '17 and later
Enhanced List View		✓			✓	Spring '24 and later
Featured Topics	✓	✓		✓	✓	Winter '16 and later
Featured Topics & Feeds	✓				✓	All versions
Feed	✓	✓	✓		✓	Winter '16 and later
Feed Compact	✓	✓	✓		✓	Winter '16 and later
Feed History	✓	✓	✓		✓	Winter '17 and later
Feed Post & Comments	✓	✓	✓		✓	Summer '15 and later
Feed Publisher	✓	✓	✓		✓	Winter '16 and later
Files List	✓	✓	✓	✓	✓	Winter '16 and later
Flow (Experience Builder Component)	✓	✓	✓	✓	✓	Winter '18 and later
Flow Orchestration Work Guide	✓	✓	✓	✓	✓	Winter '23 and later
Follow Button	✓	✓			✓	Summer '15 and later
Global Search Box	✓	✓	✓		✓	All versions
Global Search for Peer-to-Peer Communities	✓					Winter '18 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Global Search Results	✔	✔	✔	✔	✔	All versions
Group	✔	✔	✔		✔	Winter '16 and later
Group Banner	✔	✔	✔		✔	Winter '16 and later
Group Detail	✔	✔	✔		✔	Winter '16 and later
Group Related List	✔	✔	✔		✔	Winter '16 and later
Headline	✔	✔		✔	✔	All versions
HTML Editor	✔	✔	✔	✔	✔	All versions
Knowledgeable People	✔	✔			✔	Summer '15 and later
Language Selector	✔	✔	✔	✔	✔	Winter '16 and later
Lead Inbox	✔	✔	✔		✔	Summer '17 and later
Libraries	✔	✔	✔	✔	✔	Winter '18 and later
Manage Members Section	✔	✔	✔		✔	Winter '16 and later
Member Profile and Settings	✔	✔	✔		✔	Winter '18 and later
Membership	✔	✔	✔		✔	Winter '17 and later
Message Notification	✔	✔			✔	Spring '17 and later
Navigation Menu	✔				✔	Winter '16 and later
New Message Button	✔	✔			✔	Spring '17 and later
Page Refresh	✔	✔	✔	✔	✔	Summer '22 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Path (Experience Builder Site Component)	✓	✓	✓		✓	Winter '16 and later
Paused Flows	✓	✓	✓		✓	All versions
Profile Header	✓	✓	✓		✓	Before Winter '18[3]
Quip				✓		
Quip Docs Related List				✓		
Recognition Badges	✓	✓	✓	✓	✓	Winter '19 and later
Recommendations		✓			✓	Winter '18 and later
Recommendations Carousel	✓	✓	✓	✓	✓	Summer '15 and later
Record Banner	✓	✓	✓		✓	Winter '16 and later
Record Detail	✓	✓	✓		✓	Winter '16 and later
Record Information Tabs	✓	✓	✓	✓	✓	Winter '16 and later
Record List	✓	✓	✓		✓	Winter '16 and later
Record Related List	✓	✓	✓		✓	Winter '16 and later Spring '20 and later; in Help Center, a file is the only object that's supported.
Related Articles List	✓	✓	✓		✓	Summer '16 and later
Related List - Single	✓	✓	✓		✓	Winter '19 and later

[2] User Profile Menu replaces Profile Header in Lightning templates based on Winter '18 and later versions of Lightning templates.

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Related Questions List	✓	✓			✓	Summer '16 and later
Related Record List	✓	✓	✓	✓*	✓	Winter '16 and later
Related Topics List	✓	✓	✓		✓	Spring '15 and later
Report Chart	✓	✓	✓		✓	Winter '16 and later
Report List	✓	✓	✓		✓	Winter '16 and later
Report Summary	✓	✓	✓		✓	Winter '16 and later
Reputation Leaderboard	✓	✓	✓		✓	Spring '15 and later
Rich Content Editor	✓	✓	✓	✓	✓	Winter '16 and later
Scroll To	✓				✓	All versions
Search Results	✓	✓	✓	✓	✓	All versions
Embedded Service	✓	✓	✓		✓	Summer '17 and later
Stream Detail	✓	✓	✓		✓	Winter '18 and later
Stream List	✓	✓	✓		✓	Winter '18 and later
Suggested Actions	✓	✓	✓	✓	✓	Spring '19 and later
Survey	✓	✓	✓		✓	Winter '18 and later
Tab Layout	✓	✓	✓	✓	✓	Winter '16 and later
Tile Menu	✓	✓	✓	✓	✓	All versions
Top Article by Topic	✓	✓	✓		✓	Winter '16 and later

Component	Customer Service and Lightning Bolt Solutions	Partner Central	Customer Account Portal	Help Center	Build Your Own (Aura)	Available in Versions
Topic Catalog	✓	✓	✓	✓	✓	Spring '16 and later
Topic Description	✓	✓			✓	Spring '16 and later
Topic Metrics	✓	✓	✓		✓	Winter '16 and later
Topics	✓	✓	✓		✓	Winter '19 and later
Totals	✓	✓	✓		✓	Winter '16 and later
Trending Articles by Topic	✓	✓	✓		✓	Winter '17 and later
Trending Topics	✓	✓	✓	✓	✓	Spring '15 and later
Unanswered Questions	✓	✓			✓	Winter '16 and later
User Profile	✓	✓	✓		✓	Spring '16 and later
User Profile Detail	✓	✓	✓		✓	Winter '16 only
User Profile Image	✓	✓	✓		✓	All versions
User Profile Knows About	✓	✓			✓	Winter '16 and later
User Profile Menu	✓	✓	✓		✓	Winter '18 and later[3]
User Profile Related List	✓	✓	✓		✓	Spring '16 and later
User Profile Stats	✓	✓			✓	Spring '15 and Summer '15
User Profile Summary	✓	✓	✓		✓	All versions
User Profile Tabs	✓	✓			✓	Spring '15 and later
Visualforce Page Component	✓	✓	✓	✓	✓	Spring '17 and later

Login Components

Component	Available in Versions
Employee Login Link	All versions
Forgot Password	All versions
Login Form	All versions
Self-Registration	All versions
Set Icons for Social Login	All versions

Note: The following case components were retired in all Salesforce orgs in Summer '19: Case Attachments, Case Banner, Case Comments, Case Detail, Case Feed, Case Feed Publisher, and Case List. Similarly, the Set Case Status Button was retired in Winter '21.

Sites already using one of these components can continue to do so, but if you delete a component or the page containing it, you can't use the component again. Instead, to continue using the Case Comments feature, make sure that the Case Comment related list is added to the case page layout used in Experience Builder site.

SEE ALSO:

LWR and Aura Store Templates

Getting Started with the Aloha Community Template for Salesforce Identity

Account Brand Details

Use the Account Brand Details component to show company information and brand details on the Account Management page.

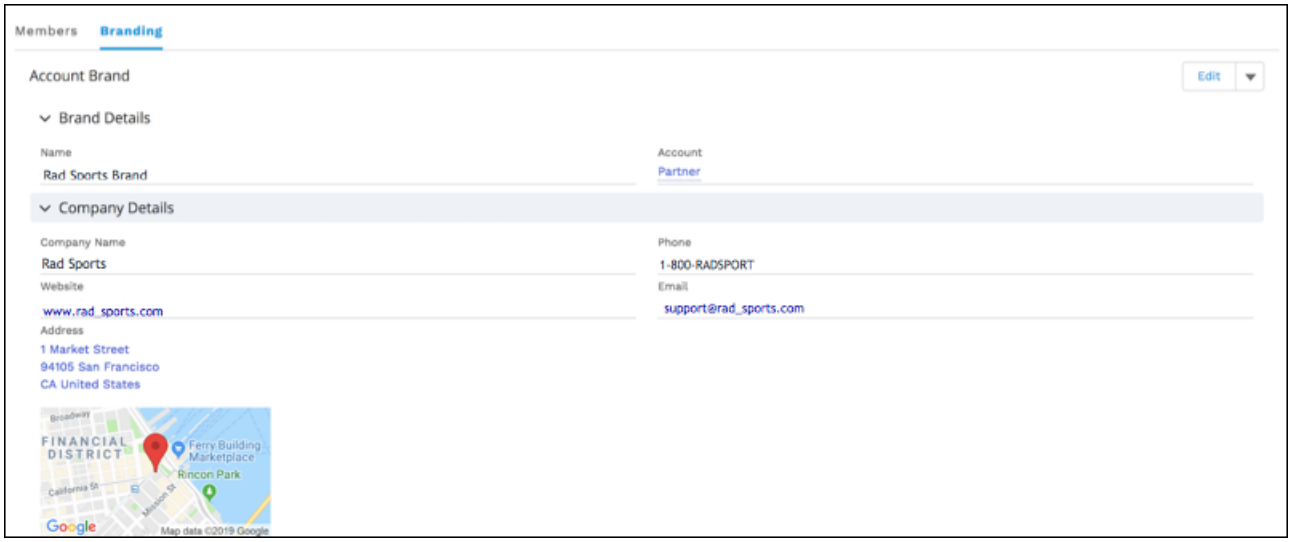
When you go to the Account Management page, you can access Experience Cloud site members and account brand details. Account brand details contain company information used for branding purposes, such as websites, email address, phone numbers, addresses, and company logos.

Note: Add the Account Brand related lists to Accounts, so partners can access brand information.

1. Drag the **Account Brand Details** component to the page, and select it.
2. In the property editor, configure the properties for the component.

Property	Details
`Account Id`	Account Id is used to look up the associated Account Brand record.

Example: Account Brand Details component:



Account Management

Channel managers can delegate partner users to help manage accounts. Using the Members tab, delegated account managers can activate and deactivate accounts and reset a member's password. They can also manage branding assets that channel managers can use to create co-branded emails, marketing campaigns, and websites.

Partner users who have been granted delegated external user administration rights can access Account Management from their Experience Cloud site. From Account Management, they can manage members of their partner account from the **Members** tab.

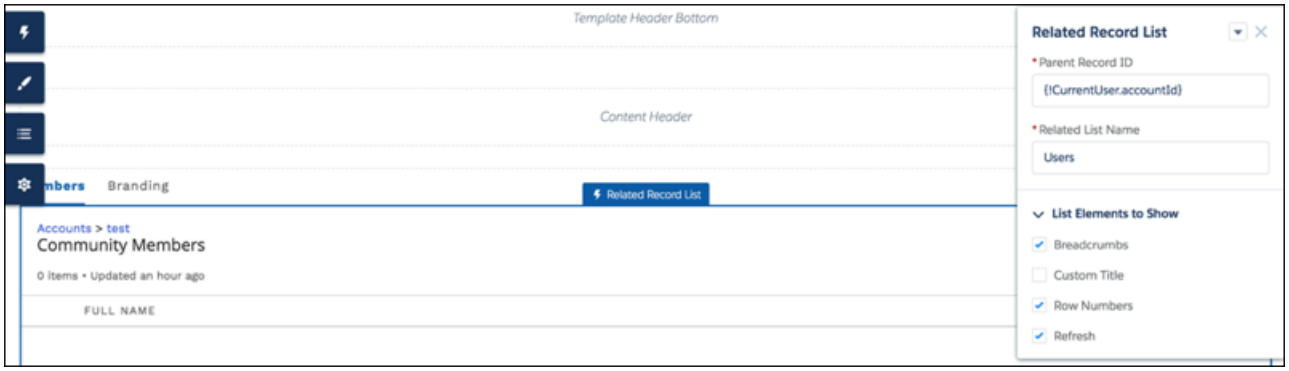
Partner users who have been granted delegated external user administration can create and edit account brands from the **Branding** tab.

Note: Add the **Account Brand** and **Members** related lists to the **Account** page layout, so partners can access member and brand information.

1. Select the **Account Management** component in the page you're configuring.
2. Click the tab that you want to configure.
3. To view the component properties, select the Properties pane:

Property	Details
`Parent Record ID`	{!CurrentUser.accountId}
`Related List Name`	Name of the related list displayed.
`List Elements to Show`	• Breadcrumbs • Custom Title • Row Numbers • Refresh
`Account Id`	{!CurrentUser.accountId}

Example: Account Management component in Experience Builder



Activities

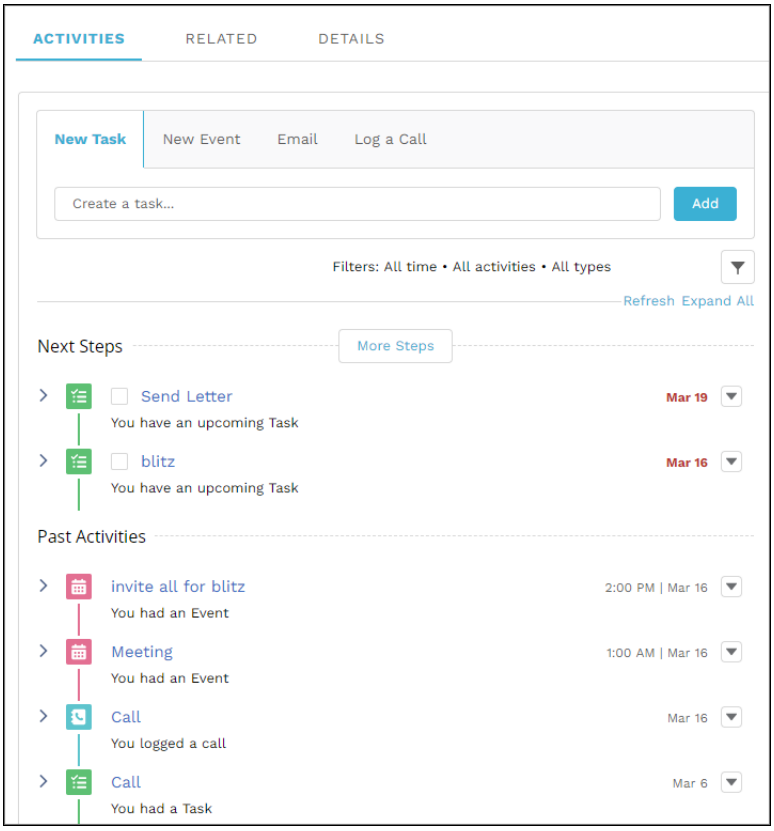
Track your open activities and activity history and view them from a record information tab in your Experience Cloud site.

Activities are supported for accounts, campaigns, claims, contacts, contracts, insurance policies, leads, opportunities, orders, products, quotes, and activity-enabled custom objects. Activities aren't available in Experience Builder site when viewed on a mobile browser.

1. Select the **Activities** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`RecordId`	The ID of the record. This value is automatically populated.

Example:



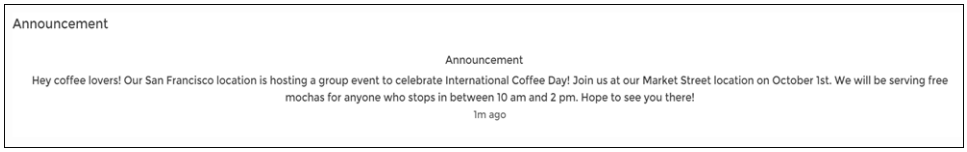
Announcement Section

The Announcement Section component displays group announcements from any page in your Experience Builder site.

1. Select the **Announcement Section** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Group ID`	Enter a group ID. To find a specific group ID, navigate to the group home page and copy the ID from the URL. The ID is a string of numbers and letters. Group URL format example: `https://MyDomainName.my.site.com/siteName/s/group/0F7A0000000DZXiNQO/groupName` For this URL, the group ID is `0F7A0000000DZXiNQO`.
`Header Label`	Enter header text for your component. The default is `Announcement`.

Example: Sample Announcement Section component:



Article Content

The Article Content component lets users view and vote on an individual article after they've selected it from search results.

The article's title, latest revision date, and article type appear with the body of the article.

Note: When a user views an article that's been returned from a web search, the navigation breadcrumbs show the path to the first category associated with the article.

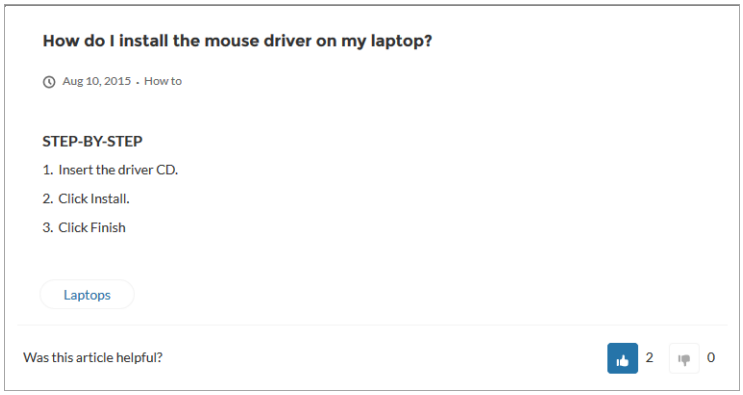
If you enable article voting for this component, authenticated users see a prompt to vote below each article. Logged-in users can give articles a thumbs up or thumbs down vote. If your org uses star ratings on articles, thumbs up votes are recorded as five stars and thumbs down votes are recorded as one star. Article voting is available in the Winter '16 and later versions of Experience Builder templates.

The user can return to the article later to view their vote, but can't change it or see voting data from other members. You can view an article's voting data at the top of the article in your org.

1. Select the **Article Content** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Record Id`	This value is retrieved when the individual article is selected.
`URL Name`	This value is retrieved when the individual article is selected.
`Show title in the article header`	Select this option to show the title in the article's header.
`Allow voting on articles`	Select this option to let users vote on articles. This option is not selected by default. This functionality is available only in the Winter '16 and later versions of Experience Builder templates.
`Show topics`	Select this option to show topics associated with an article.

Example: Sample Article Content component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Articles with This Topic

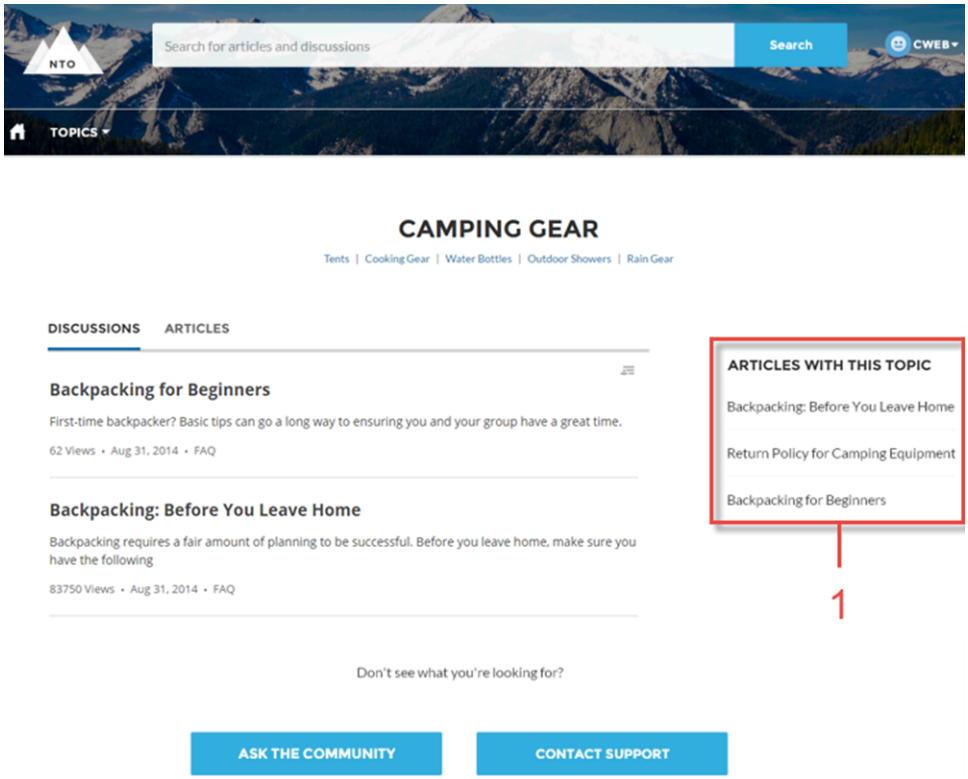
The Articles With This Topic component is used on the Topic Detail page in Experience Builder sites built using the Customer Service template. It shows articles that have been tagged with the topic in question.

1. Select the **Articles With This Topic** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Topic ID`	The system supplies this value, and populates the component with articles specific to the topic shown on the topic detail page.
`Title`	Enter text for the title. The default text is `Articles With This Topic`.
`Show Title`	Show the title by checking this box.
`Number of Articles`	Select the number of articles you want to show at a time. The default number is 10.

Note: In order for articles to populate this component, the site language and article language must match.

Example: Sample Articles With This Topic component:



SEE ALSO:

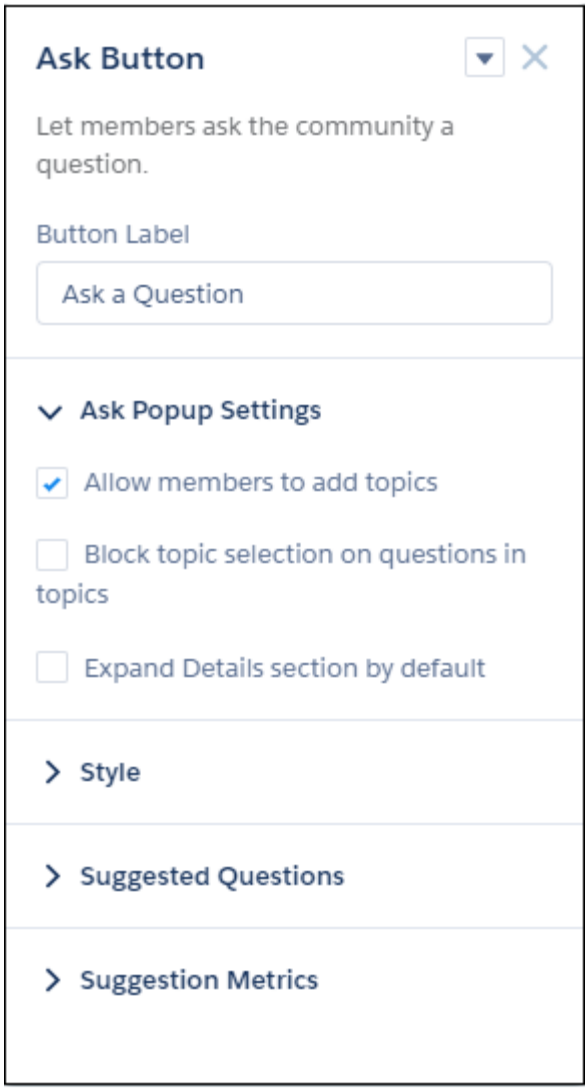
Which Components Can I Use with Each Aura Template?

Ask Button

The Ask Button component lets users click a button to ask a question that is then published to the site. Users must log in to ask questions and participate in discussions.

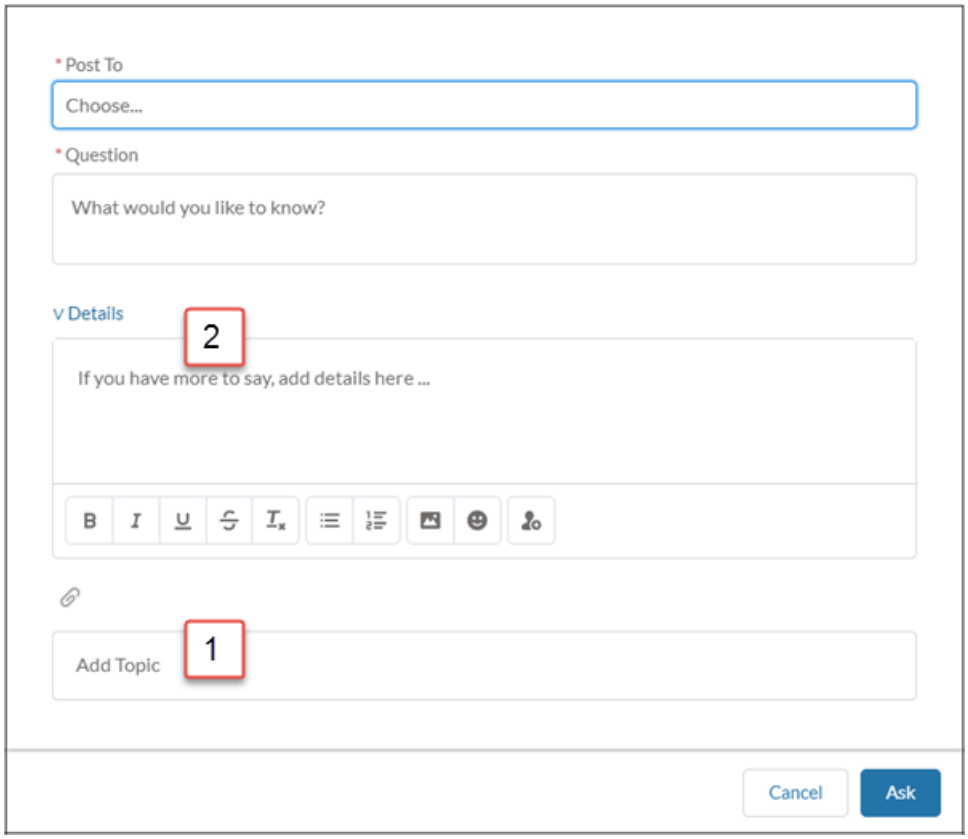
The Customer Service template pages come with two Ask Button components: one at the top of the page, and one at the bottom. The two aren't linked, so you can remove one button or use different text or styling for each button.

1. Select the **Ask Button** component on the page you're configuring.
2. In the property editor, configure the properties for the component.



Property	Details
`Button Label`	Enter the text to show on the Ask button. The default is *`Ask a Question`*.
`Allow members to add topics`	Select to show the topic area at the bottom of the feed publisher (1) and to allow members to add topics.
`Block topic selection on questions in topics`	In a topic feed, block members from choosing a different topic from the Post To list when they ask a question.
`Expand Details section by default`	When a member asks a question, show the Details section in an expanded state (2).
`Button Text Color`	Set the color to use for button text when the button is inactive. For all values, link icon shows that the current selection comes from colors defined in the Experience Builder theme.

Property	Details
`Button Text Hover Color`	Set the color to use for button text when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	Set the position of a button within its container by selecting *`Center`*, *`Left`*, or *`Right`*.
`Suggest questions`	Select to show previous questions that are similar to the one the member is asking. This property assists with question deflection and helps in using existing resources.
`Include discussions in suggestions`	Select to show discussions related to the question the member is asking. This property assists with question deflection and helps in using existing resources.
`Include articles in suggestions`	Select to show Knowledge articles related to the question the member is asking. This property assists with question deflection and helps in using existing resources.
`Max Suggestions to Show`	Set the maximum number of questions, discussions, and articles to show to a member who is asking a question.
`Show satisfaction prompt`	Select to show the member a prompt that asks if they were satisfied with the information provided when they asked a question.
`Satisfaction Prompt`	Enter the question you want to ask a member about their satisfaction with the questions, discussions, and articles provided in response to their question. The default is *`Did we help to answer your question?`* Frame the question so that a positive response shows that your data helped and a negative response shows that it didn't. Member response data provides you with metrics on the effectiveness of question deflection.
`Ask follow-up question`	Select to ask the member a follow-up question to their satisfaction response.
`Follow-Up Prompt`	Enter the follow-up question you want to ask the member. The default is *`Can we close your question?`* A member's positive response closes the question without posting it. A negative response keeps the member's question active.
`Confirmation Message`	Enter a confirmation message to show when a member responds to your prompts. The default is *`Got it!`*



Example: Sample Ask Button component:

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Deflection

Breadcrumb

Use the Breadcrumb component in an Experience Builder site template on topic, article, or feed detail pages to let your customers easily navigate back to parent or grandparent topics.

1. Select the **Breadcrumb** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Unique Name or ID`	Use `{!topicID}` on topic pages, `{!feedItemID}` on question or feed item pages, and `{!urlName}` on article pages.

Note: While topics reside in a fixed hierarchy, articles and feeds can be assigned to multiple topics at once. When an article or feed is assigned to a multiple of topic hierarchies, the Breadcrumb component shows topics that are the most discussed in a site.

Breadcrumbs don't appear on top-level topic pages.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Calendar

View your events and others' calendars from your Experience Builder site on your desktop or mobile device.

Your admin can configure the calendar to display details in the side panel of the calendar component or they can hide the sidebar. Calendar sidebars are turned on by default and display your "My Events" calendar and other users' calendars that have been shared with you. If your calendar is set up to display the side panel, you can collapse it if you need more space.

Note: There are a few things to keep in mind when using calendars from a site:

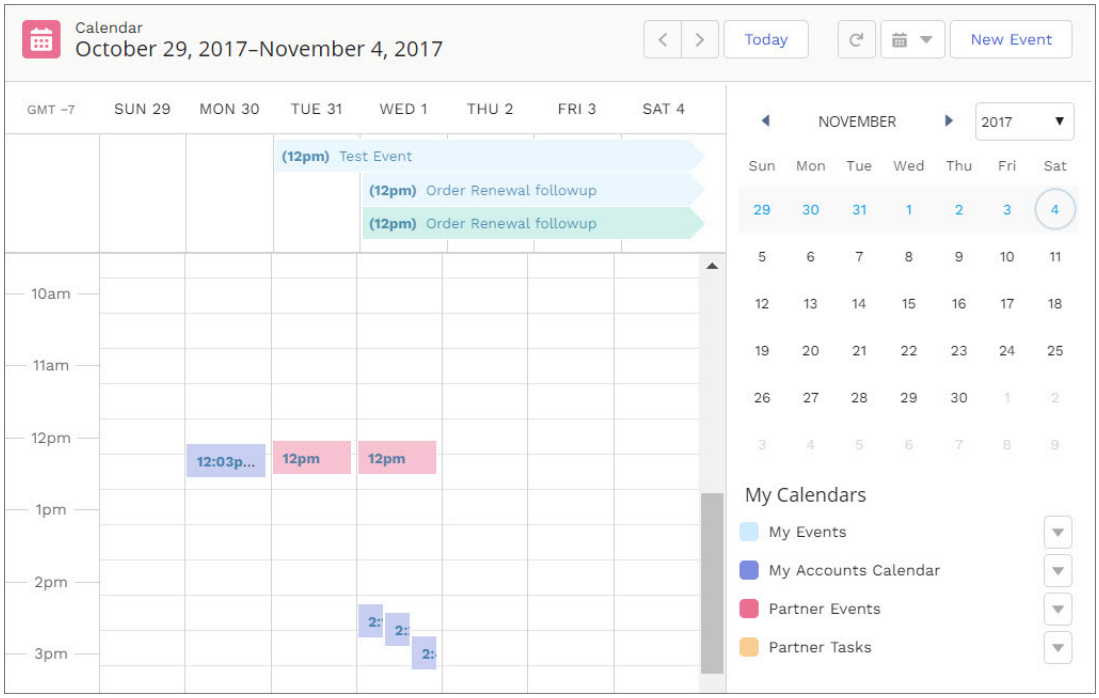
- The option to hide or open the side panel in the Experience Cloud site Calendar is only available in calendars that have been configured to **Show Calendar Sidebar**.
- Internal users and partners users can add a public calendar to their Other Calendars section.
- When added as attendees, partners can see the event preview card, but they can't edit or view complete event details.
- Customer users can't access public calendars and events.
- Customer and partner users can't add user records as attendees to events.
- Partner users can invite people to calendar events using their email addresses. Because partner users can't access other partner users' email addresses, they can't invite other partner users to calendar events.
- Partner users can't view shared calendars from mobile devices.

You can share your My Events calendars with other team members and add their calendars to your view. If you want to change one of your events, simply drag it to a new time slot.

1. Select the **Calendar** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Show Calendar Sidebar`	To display the calendar sidebar by default, select this option. To work with this item, use the full Salesforce site.
`Show Other Calendars`	To display calendars that have been added to user's calendar view, select this option. To work with this item, use the full Salesforce site.
`Let Users Create New Calendars`	Turn on this option to create a calendar. To work with this item, use the full Salesforce site.

Example:



Campaign Marketplace

With Campaign Marketplace, you can provide the structure and guidance necessary for partners to successfully execute campaigns. Channel marketers can create and share marketing campaigns, guidelines, and assets with partners. Partners can then choose which campaigns work best for them.

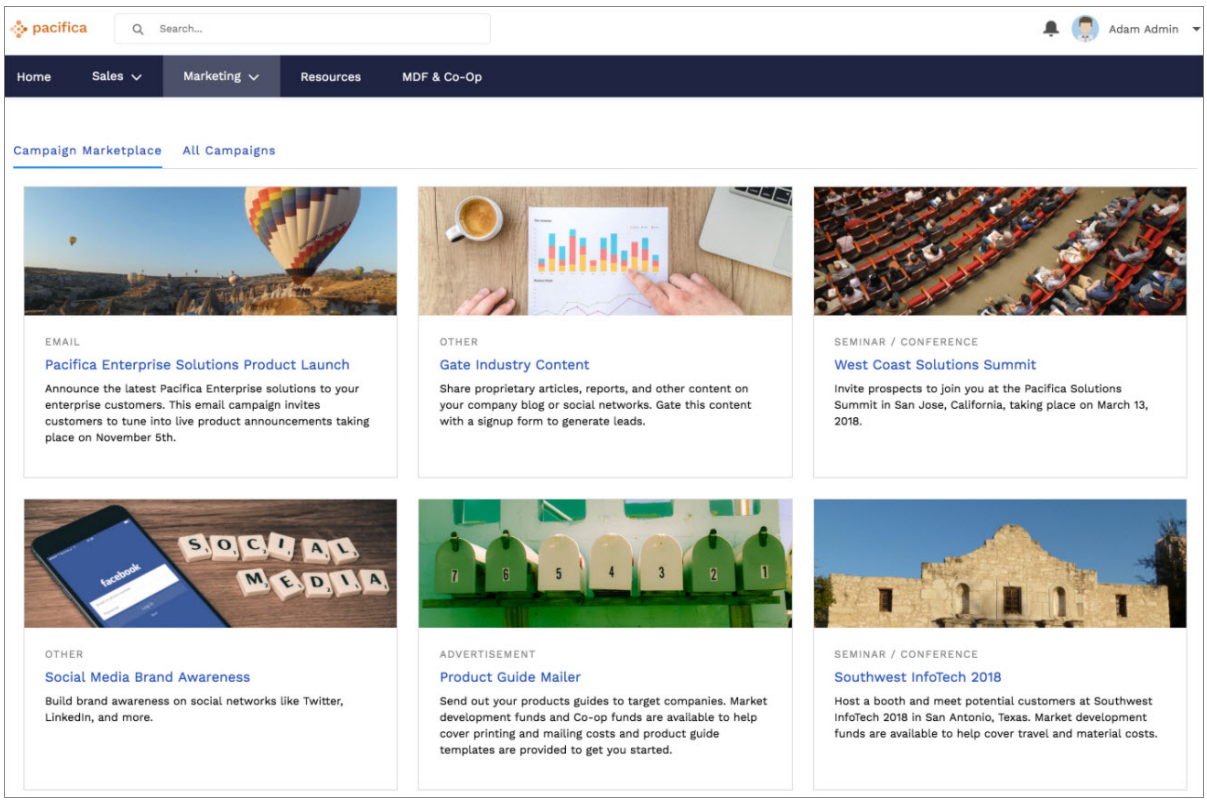
Configure Campaign Marketplace to display pre-approved campaigns for partners. This feature is available in Lightning Experiences and Lightning Bolt solutions.

1. Select the **Campaign Marketplace** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

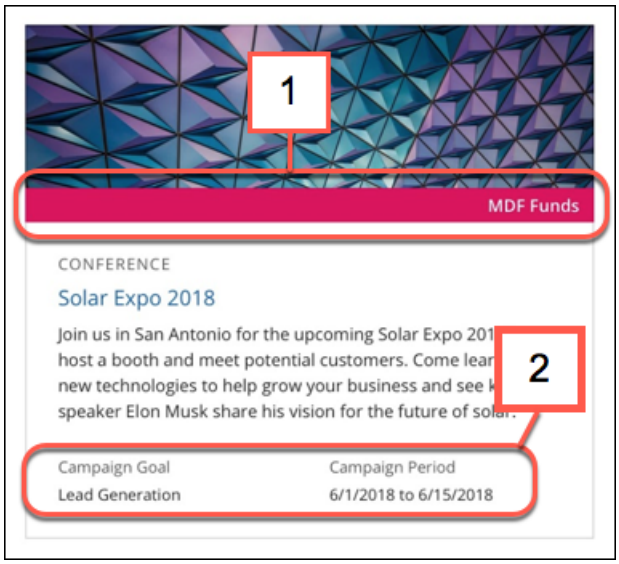
Property	Details
`List View Name`	This field looks up to the list view of campaigns created by the admin.
`Sort By`	This field establishes how campaign tiles are categorized.
`Sort Order`	This field establishes the order that campaign tiles appear in.
`Header Label`	The label that appears at the top of the campaign marketplace.
`Show Image`	Displays the `Image` field on a campaign.
`Highlight`	Designates the field to highlight in the campaign marketplace.
`Highlight Color`	Designates the color to highlight your campaigns with.

Property	Details
`Category Field`	This field appears at the top of each campaign tile. Add a category field to callout important information about a campaign.
`Title Field`	The title of the campaign.
`Body Field`	Information displayed in the body of the campaign tile.
`Data Fields`	Add data fields to call out additional important information about a campaign. The data fields appear at the bottom of the campaign tile.

Example: Organize marketing campaigns with the Campaign Marketplace.



Add 1) highlights and 2) data fields to call out additional information about a campaign.



Case Comments Publisher

Use the Case Comments Publisher component to let customers and agents collaborate using comments on cases. Your customers can open cases, post comments, upload attachments, and check the status of their cases from any of their devices.

The component provides a chronological, filterable list of comments your customers and agents have had within the context of a case. It includes case activities, internal and external comments, attachments, and status changes. When authenticated users add a comment to a case, they can add a file to the case as an attachment. So when a customer creates a case using a mobile phone, they can take a picture with their phone's camera and attach it to the case.

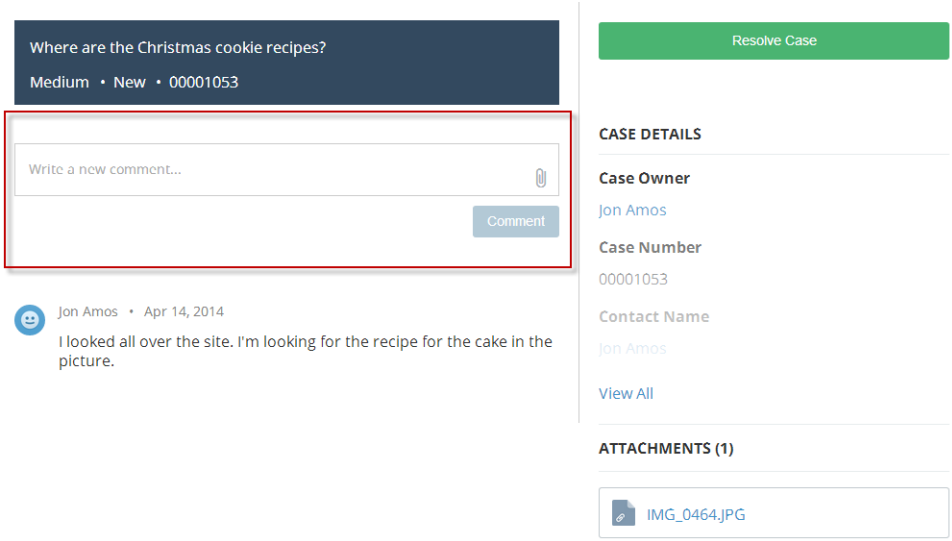
Note: Users must have edit access on cases in order to attach files with the Case Comments Publisher component.

By default, users can attach any supported file type that is 5 MB or less. You can restrict the types of files that users can upload by changing the default values for content types on the Library tab.

1. Select the **Case Comments Publisher** component in the page you're configuring.
2. To configure properties for the component, select the Properties pane:

Property	Details
`Case ID`	Leave the default query string for the unless you plan to customize the component and add your own query string. The system uses the query string in this field to return the Case ID.
`Publisher Placeholder Text`	Enter the text that appears in the search bar. The default value is **Write a new comment...**.
`Mobile Header Text`	Enter the text that appears as the header for mobile users. Mobile and tablet see the text as the header for the comment text area.
`Can Attach Files`	Lets users attach a file to the comment.
`Post Button Label`	Enter the text for the button that submits the case or comment.

Example: Sample Case Comments Publisher component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Deflection

The Case Deflection component searches text as it's being entered into the Contact Support Form component, and returns relevant articles and discussions. If users don't get the answer they need, they can continue with their request for support.

Note: For guest users, a case deflection search matches article titles only. It doesn't return matches from the body of the article.

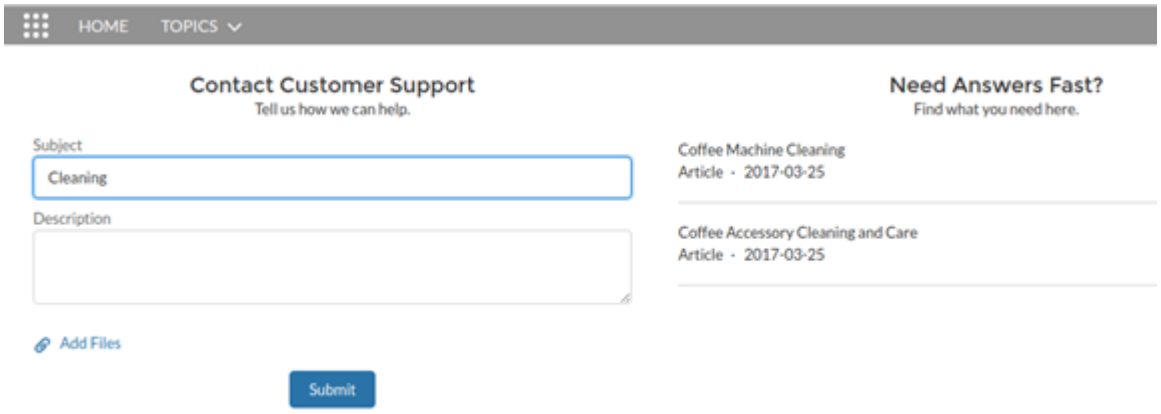
If you built your Experience Cloud site before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing site to use the new components, as future updates and improvements are made on Contact Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your site's case deflection. If you want to migrate to the new components, check out this topic.

1. Select the **Case Deflection** component in the page you're configuring. Avoid placing the component in the template header or footer of the page. Doing so causes the component to appear on all pages.
2. In the property editor, configure the properties for the component.

Property	Details
General Settings	Click to expand.
`Title`	Bold text that appears over suggested articles and discussions. The default is **Need Answers Fast?**.
`Subtitle`	Bold subtitle shown over suggested articles and discussions. The default is **Find what you need here.**.

Property	Details
`Maximum Suggestions to Display`	Maximum number of suggested articles and discussions to show. The default is 6.
Empty State Content	Click to expand.
`Topic ID`	Use the dropdown menu to elect a topic to show before site users start entering text in the Contact Support Form component. If you leave this field empty, the component shows trending topics.
Content Types	Click to expand.
`Articles`	Select to include articles in suggestions.
`Discussions`	Select to include discussions in suggestions.
Deflection Metrics	Click to expand. You can view the data that's gathered in this section in the Case Deflection Dashboard. This dashboard is available as part of the Salesforce Community Management Package, which you can find on AppExchange.
`Ask users if they're satisfied with the suggested content`	Let users tell you whether the suggested articles and discussions helped solve their case.
`Satisfaction Prompt`	Ask users if they're satisfied with suggestions. Default text is: **Did the content help solve your issue?**
`Ask follow-up prompt`	Ask a follow-up question, provided users answer the first question.
`Follow-Up Prompt`	Enter the text to use for your follow-up question. Default text is: **Stop creating your case?**
`Redirect URL for Abandoned Cases`	The URL of the page you want users to see if they abandon their case.
`Confirmation Message`	Default text is: **Got it!**

Example: Sample Case Deflection component:



SEE ALSO:

Ask Button

Contact Support & Ask Buttons

Channel Menu

Use the Channel Menu component to add the menu and button to your Experience Cloud site.

1. Complete these setup tasks to add the Channel Menu to your Experience Cloud site.
2. From the Components list, select the Channel Menu component and drag it onto the page that you're configuring.
3. On the page, select the **Channel Menu** component.
4. In the property editor, configure the properties for the component:

Property	Details
Channel Menu Deployment	Choose from the picklist for your org's Channel Menu Deployment.

CMS Collection

Add a CMS Collection to your Aura site using the CMS Collection component in Experience Builder. If you created a collection in your Content Management Workspace, you can customize the layout on your site page. If you don't have a collection yet, you can still add the component as a placeholder on your page.

The CMS Collection component can be added to a page multiple times and can use collections created from CMS content or Salesforce CRM data. Collections are created in the Content Management area of Experience Workspaces. You can add the CMS Collection component to pages before you create your first collection. But until a collection is associated with the component, you can't access the layout options.

1. In Experience Builder, click **Components**.
2. Drag the **CMS Collection** component onto the page.
3. In the component property panel, click **+ Add Collection**.
4. Select the collection that you want to add from the list, and save your changes.

   Tip: The Type column indicates the source of a collection. For example, News is any collection composed of CMS News content. An object name such as Account or Product indicates a Salesforce CRM Collection.

5. In the component property panel, customize the collection layout and content layout as needed.

Note: Be cautious when using the CMS Collections component to show products in a B2B Commerce store. The component doesn't respect user entitlements. All users with access to a page where the component shows products, see all products that are exposed through the component.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To access an Experience Builder site's Content Management workspace:

- Create and Set Up Experiences
- AND is a member of the site

To customize an Experience Builder site:

- Create and Set Up Experiences OR assigned an experience admin, publisher, or builder role in that site
- AND is a member of the site

CMS Connect (HTML)

The CMS Connect (HTML) component lets you display HTML content from a content management system (CMS). After setting up a connection in your CMS Connect workspace, drag a CMS Connect component on a page to render content from that connection.

Before using the CMS Connect (HTML) component, see Create a CMS Connection in *CMS Developer Guide*. Then choose **Use in Builder** for the connection you want to use.

1. From the Component panel in Experience Builder, drag a CMS Connect component to the page and location where you want to display it.

2. Select the component. In the property editor, configure its properties.

Property	Details
`CMS Source`	Select the CMS source that contains the content to display. If no sources are listed, click **Manage Connections** to set one up.
`Component Path`	Enter the path to the component to display. If the connection has a root path, enter only the component part of the path. For example, if you entered `content/capricorn` for the root path, enter only `banner1` for the component path. If your connection doesn't have a root path, enter the full path for the component.
`Personalization`	Select the option to enable personalization for this instance of the CMS Connect (HTML) component. Personalization lets you keep branding and other content consistent between your community and your website.

CMS Connect (JSON)

The CMS Connect (JSON) component displays JSON content from a content management system (CMS).

Before using the CMS Connect (JSON) component, see Create a CMS Connection in *CMS Developer Guide*. The connection includes the server URL and paths to your JSON information. It also defines content lists and content items that you want to display. Then choose **Use in Builder** for the connection you want to use.

1. In Experience Builder, drag a CMS Connect (JSON) component from the Components panel to the location on the page where you want to display it.
2. Using the property editor, configure the component's properties.

Property	Details
`CMS Source`	Select the CMS source containing the content that you want to display. If no sources are listed, go to your CMS Connect workspace and define content items and content lists for the connection.
`JSON Content`	Select the JSON content. Choose from the content items and content lists that you set up in the connection. In the property editor, the fields that you see depend on what you select. For example, if you select a content list, you see the layout options for a list.
`Component Path`	Applies only for content items. Enter the path to the component to display. For example, enter the ID of a blog.

Property	Details
`Content List Layout`	Choose a layout for your content list. Currently, the only option is Grid. Define the grid layout using the Items Per Page and Columns properties.
`Content List Item Layout`	Choose a layout for items in your content list. Currently, the only option is Card. To specify card properties (Title, Author, and so on), enter a JSON expression or value. For example, enter *`@key`*, *`6`*, or *`{!id}`*.
`Content Item Layout`	Choose a layout for your content item. Currently, the only option is Detail. To specify detail properties (Title, Author, and so on), enter a JSON expression or value.
`Items Per Page`	Enter the number of content items that display on each page.
`Columns`	Enter the number of columns of content items that display on desktops and tablets. Phones display content items in a single column.
`Title`	Enter a JSON expression or text for the title, such as *`@title`*.
`Author`	Enter a JSON expression or text for the author, such as *`@author/name`*.
`Published On`	Enter a JSON expression or text in ISO format for the publish date. For example, *`@date`* or YYYY-MM-DDTHH:mm:ss.sssZ.
`Body`	Enter a JSON expression or text for the content body, such as *`@content`*.
`Image Source`	Enter a JSON expression for the image source of the content item, such as *`@featured_image`*.
`Navigation` section	Set up the navigation link for content items in your content list.
`Link Text`	Enter the link text to display on your site page. The default is Read More.
`Type`	Select whether the link points to a generated page or an external URL with the content items in your content list.
`Page`	Displays the name of the generated detail page. The default name reflects the CMS source and content type name for your connection. To change the default name, URL, or layout of this page, change the page properties using the Pages menu.
`URL`	Enter the fully qualified URL to the content. You can also specify JSON expressions, such as @link.

CMS Single Item

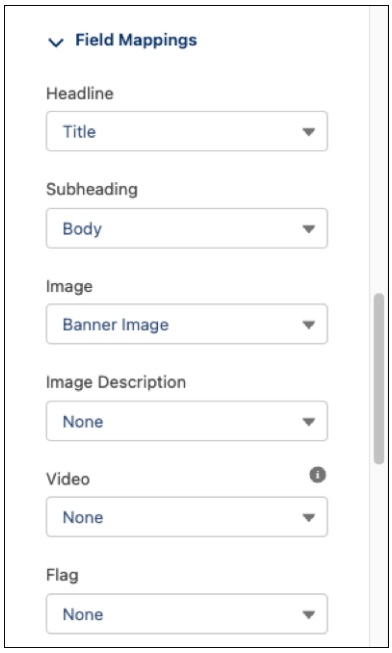
Add a single item of Salesforce CMS content such as a corporate statement, article, or image to your Aura site using the CMS Single Item component. You can add any content type, including News, Image, or Document, as a single item to a page.

Before using the CMS Single Item component, create content in Salesforce CMS. You can add the component to your site without a content source, but you can't configure it until you link it to content.

Note: You can only add published content created in the Digital Experiences app. If you have a published piece of content and a draft version of the content, the latest published version is what's available to select.

1. In Experience Builder, click **Components**.
2. Drag the **CMS Single Item** component onto the page.
3. In the component property panel, click **Add Content**.
4. Select the content that you want to add from the list of published CMS content items, and save your change.
5. In the component property panel, customize the content layout, such as font size, image position, overlays, and more.
6. In Field Mappings in the component property panel, map elements from your Salesforce CMS content to elements of the CMS Single Item component.

   For any given area, select an available field from the dropdown. For example, for Headline, you can select Title, and for Subheading, you can select Body. Your changes are saved as you make selections, and they're reflected in the preview.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To create, customize, or publish an Experience Builder site:

- Create and Set Up Experiences AND View Setup and Configuration

Note: When you publish or unpublish content that is bound to a CMS Single Item, your guest users can experience up to an hour delay before they see the updated content in your site. Authenticated users can experience up to a five-minute delay.

SEE ALSO:

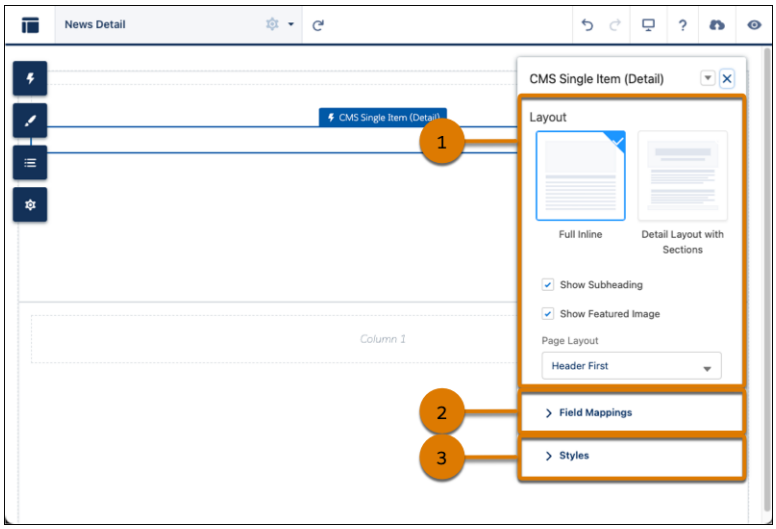
Which Components Can I Use with Each Aura Template?

CMS Single Item (Detail)

Add the CMS Single Item (Detail) component to a CMS Content page to configure the page and let users see your content in full. Use this component to customize the content and layout of detail pages for all CMS content types: News, Image, and Document.

You can only add the CMS Single Item (Detail) to a CMS content detail page in Experience Builder. There's only one detail page for each content type in Salesforce CMS.

1. In Experience Builder, navigate to a detail page, and then click **Components**.
2. Drag the **CMS Single Item (Detail)** component onto the page.
3. In the component property panel, determine the content layout (1), map fields to fields in the CMS content (2), and customize the layout of images and headers (3).



Show content fields in a default order, or group them into sections for a more precise layout. To fully customize the appearance of your CMS content detail page, continue adjusting the fields in the component property panel.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To create, customize, or publish an Experience Builder site:

- Create and Set Up Experiences AND View Setup and Configuration

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Contact Request Button & Flow

Add the Contact Request Button & Flow component to let members click a button to request that customer support get back to them. Members describe the problem and enter their contact details in a window. After the request is sent, a support person can review the issue and contact the customer for follow-up and resolution.

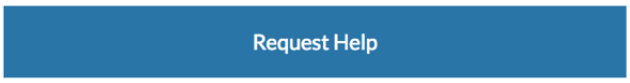
Tip: To use this component, create a contact request flow from the Customer Contact Requests page in Setup. When a customer submits a request, a contact request record is created. You can route contact request records using Omni-Channel.

Contact Request works in public sites and sites that require authentication. Make sure that your site users have the Run Flows permission, including your Guest User profile that's used in public sites. Without this permission, members don't see the button to submit contact requests.

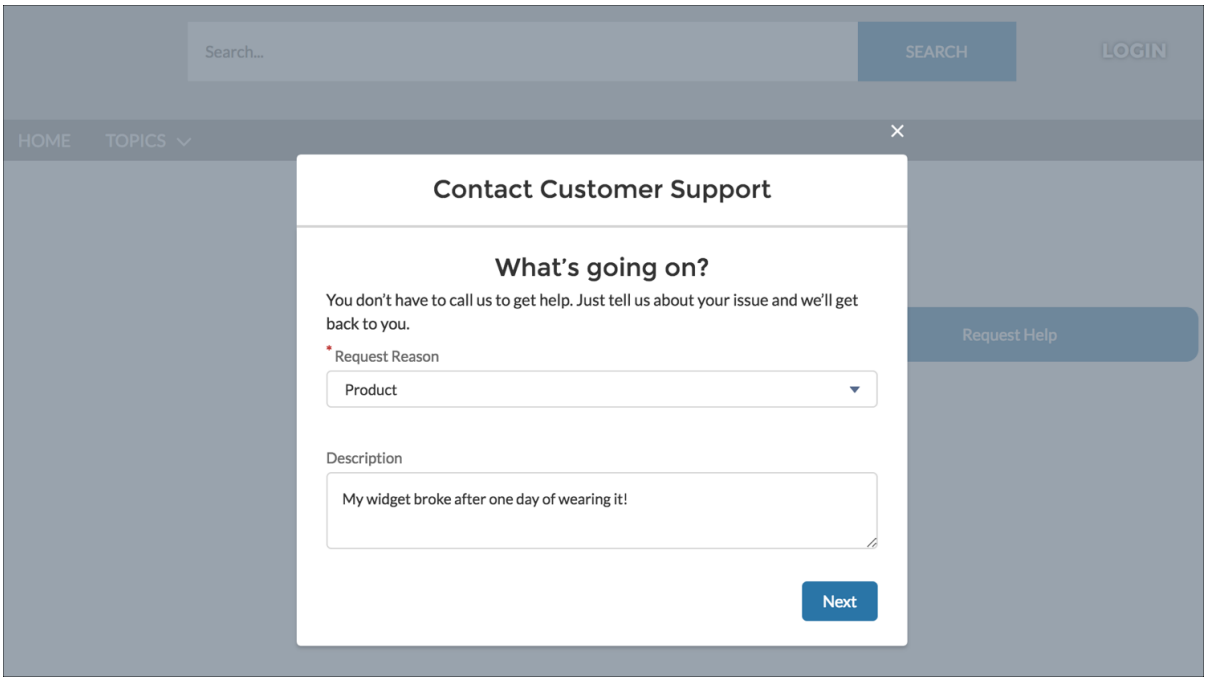
1. On the page that you're configuring, select the **Contact Request Button & Flow** component.
2. In the property editor, configure the component properties.

Property	Details
`Button Label`	The text to display on the support request button. The default is Request Help.
`Contact Request Flow`	Select a contact request flow that you created in Setup or in Flow Builder. Only active flows that have the type Contact Request Flow are supported.
`Button Text Color`	Set the color of text to use for the button label. The link icon shows that the current selection comes from colors defined in the theme.
`Button Text Hover Color`	Set the color of text to use for the button label when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container that the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	Select *`Center`*, *`Left`*, or *`Right`* to set the position of a button within its container.

Example: Sample Contact Request Button & Flow component.



When a user clicks the button a window appears.



SEE ALSO:

Let Customers Create Contact Requests

Contact Support Button

The Contact Support Button component adds a button that users click to create a case. When you enable Web-to-Case and set up a guest user case publishing action, guest users aren't required to log in before creating a case.

Each button instance supports its own property values. So, if you have two Contact Support buttons on a page, the values on each button are unique to that button. You can configure buttons to use the values you defined in your theme so that they all look the same. But each button instance remains unique.

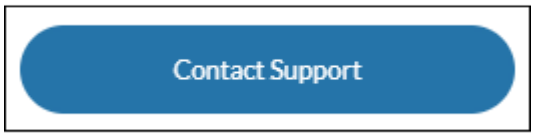
Note: Guest users can't attach files when creating a case.

1. Select the **Contact Support Button** component in the page you're configuring.
2. In the property editor, configure the properties for the component:

Property	Details
`Button Label`	The text to show on the button that users click to create a case. The default text is `Contact Support`.
`Button Text Color`	Set the color of text to use for the button label. The link icon shows that the current selection comes from colors defined in the theme.
`Button Text Hover Color`	Set the color of text to use for the button label when a member mouses over the button. In Experience Builder , you can test hover colors in Preview mode.

Property	Details
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Experience Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container that the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	Select *`Center`*, *`Left`*, or *`Right`* to set the position of a button within its container.

Example: Sample Contact Support Button component:



Contact Support & Ask Buttons

The Contact Support & Ask Buttons component adds two buttons to the page. The Contact Support button lets users click a button to create a case. The Ask button lets members ask a question and publish it to the site. All members must be logged in to ask the site a question.

When you enable Web-to-Case and set up a guest user case publishing action, guest users aren't required to log in before creating a case.

Note: Guest users can't attach files when creating a case.

Each button instance supports its own property values. So, if you have two sets of Contact Support & Ask buttons on a page, the values on each button are unique to that button. You can configure buttons to use the values you defined in your site theme so that they all look the same. But each button instance remains unique.

1. Select the **Contact Support & Ask Buttons** component on the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Header Label`	The text to show at the top of the component.
`Ask Community Label`	The text to show on the Ask button. The default text is `Ask a Question`.
`Contact Support Label`	The text to show on the Contact Support button. The default text is `Contact Support`.

Property	Details
`Allow members to add topics`	Select to show the topic area at the bottom of the feed publisher and to allow members to add topics.
`Expand Details section by default`	When a member asks a question, show the Details section in an expanded state.
`Button Text Color`	Set the color of button text to use when the button is inactive. The link icon shows that the current selection comes from colors defined in the theme.
`Button Text Hover Color`	Set the color of text to use when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Builder, you can test hover colors in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button border.
`Suggest questions`	Select to show questions that are similar to the one the member is asking. This property assists with question deflection and helps in using existing resources.
`Include discussions in suggestions`	Select to show discussions related to the question that the member is asking. This property assists with question deflection and helps in using existing resources.
`Include articles in suggestions`	Select to show Knowledge articles related to the question that the member is asking. This property assists with question deflection and helps in using existing resources.
`Max Suggestions to Show`	Set the maximum number of questions, discussions, and articles to show to a member who is asking a question.
`Show satisfaction prompt`	Select to show the member a prompt that solicits information about their satisfaction with the content provided to them when they asked a question.
`Satisfaction Prompt`	Enter the question you want to ask a member about their satisfaction with the questions, discussions, and articles you provided in response to their question. The default is *`Did we help to answer your question?`* Frame the question so that a positive response shows that your data helped and a negative response shows that it didn't. Member response data provides you with metrics on the effectiveness of question deflection.
`Ask follow-up question`	Select to ask the member a follow-up question to their satisfaction response.
`Follow-Up Prompt`	Enter the follow-up question that you want to ask the member. The default is *`Can we close your question?`* A member's positive response closes the question without posting it. A negative response keeps the member's question active.
`Confirmation Message`	Enter a confirmation message to show when a member responds to your prompts. The default is *`Got it!`*

Example: Sample Contact Support & Ask Buttons component:

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Case Deflection

Contact Support Form

The Contact Support Form allows guest and authenticated users to create cases from a site. It works with the Case Deflection component to help site members find articles and discussions to answer questions as text is being entered into the form.

If you built your Experience Cloud site before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing site to use the new components, as future updates and improvements are made on Contact Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your site's case deflection.

Check out this topic if you want to migrate to the new components.

Note: A few things to keep in mind when using the Contact Support Form component:

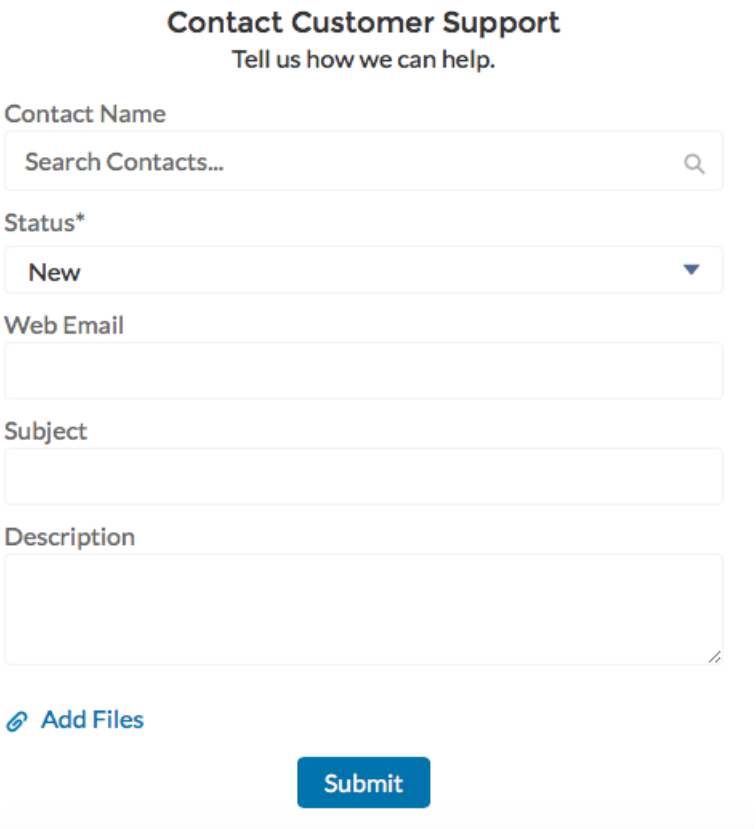
- Feed items aren't generated for attachments when you create a case with the Contact Support Form component.
- When you configure the case page layout for your site, specify that some fields are required. Adding required fields to the layout ensures that customers don't accidentally submit cases with empty fields.
- Fields with the data type `lookup`, such as Contact Name, Account Name, and custom lookup fields, aren't supported for guest users.
- Automatic triggers that change record ownership can affect what object details are visible to users or where the details are displayed. For example, if you create a case using the Contact Support Form component and an automatic trigger changes the case owner, the case record ID appears in the Case Number field.

1. Select the **Case Deflection** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
General Settings	Click to expand the section with general setting properties.
`Title`	Text that displays at the top of the form customers use to create a case. The default is **Contact Customer Support**.
`Subtitle`	Subtitle at the top of the form that customers use to create a case. The default is **Tell us how we can help**.
Performance Settings	Click to expand.

Property	Details
`Create Cases in Batches`	A global action that allows users to create cases in batches, rather than one at a time. Batching creation increases the number of cases that can be created at a time for high-volume sites.
Authenticated Users	Click to expand.
`Global Action`	A global action that allows users to create cases. The global action must be a Create a Record type, and on the case object.
`Configure global actions for authenticated users`	Link to the area in Salesforce Setup where you can create global actions.
`Attach files`	Select to allow users to attach files to their cases. They can upload up to 10 files.
`File Upload Button Label`	Label for the button to allow customers to upload files. Default text is *`Upload File`*.
Guest Users	Click to expand.
`Global Action`	A global action that allows guest users to create cases. The global action must be a Create a Record type, and on the case object.
`Configure global actions for guest users`	Link to the area in Salesforce Setup where you can configure global actions for guest users.
Confirmation Text	Click to expand.
`Confirmation Title`	The title at the top of the page confirming that a case was created. Default text is **Your case was created.**
`Confirmation Subtitle`	More information under the confirmation title, after a case was created. Default text is **We'll get back to you soon.**
`Case Summary`	Shows the case subject and case number for the user's future reference.
`Show Call to Action button`	Select this option to have folks take a follow-up action after filing a case.
`Call to Action`	The URL of the site you want users to see after filing a case.
`Call to Action Text`	Call to action text label, based on what you want users to do.
`Call to Action Button Text`	Text label for the call to action button.

Example: Sample Contact Support Form component:



Create Case Form

The Create Case Form component searches text as it's being entered into a case and displays articles based on the typed text. If users don't see an answer, they can contact support for help. You can also protect your site from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.

Before Spring '16, this component was named Case Creation.

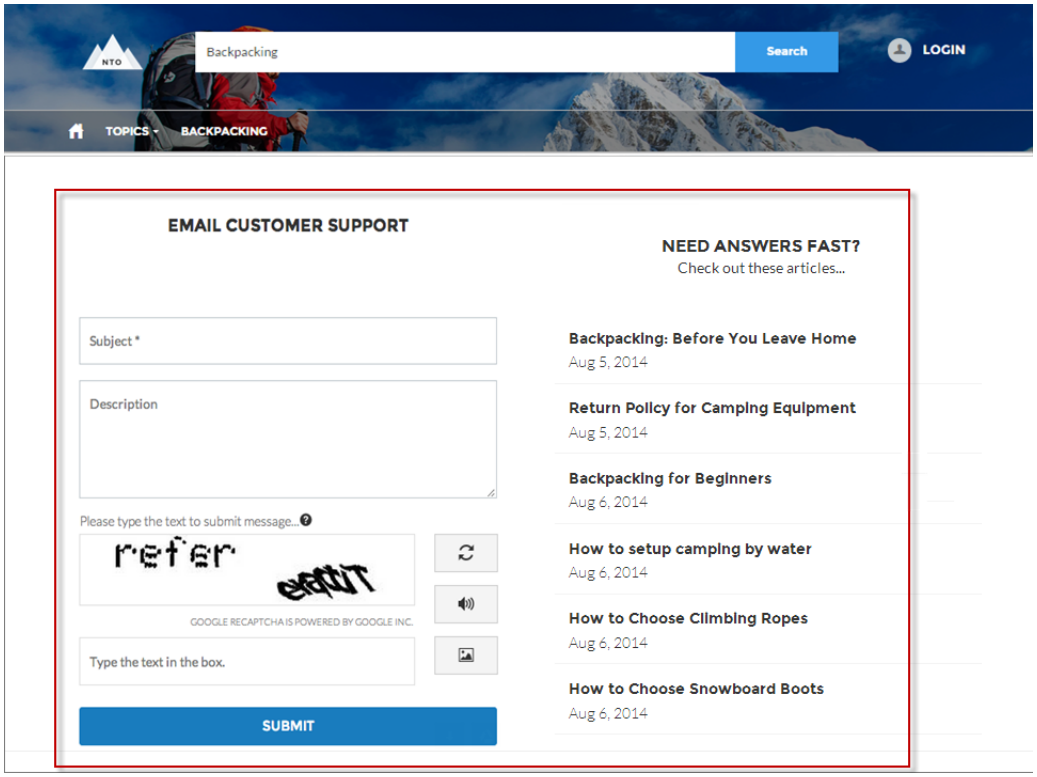
Note: When you configure the case page layout for your site, specify that some fields are required. Adding required fields to the layout ensures that customers don't accidentally submit cases with empty fields.

1. Select the **Create Case Form** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
General Settings	Click to expand the section with general setting properties.
`Attach Files`	Lets authenticated users attach a file to the comment in the case. Your organization's settings control the limits for file sizes. If you enable Web-to-Case to let guest users create cases, keep in mind that guest users can't attach files to a case.

Property	Details
`Header Title`	Text that displays at the top of the page customers use to create a case. The default is Email Customer Support.
`Confirmation Message Title`	Text that appears as the title of the message confirming that the case has been created. The default is: Your request was submitted successfully.
`Confirmation Message Description`	Text that appears as the body of the message confirming that the case has been created. For example, You'll hear back from us soon.
Actions in the Publisher	Click to expand the section with action properties.
`Signed-In User Case Action`	The name of the action that creates cases for authenticated users. Use the action layout editor for the case object in Salesforce setup to specify which fields to include in the layout. The NewCase action is a default in your Salesforce org.
`Guest User Case Action`	The name of the action that creates cases for unauthenticated users. Use the action layout editor for the case object in Salesforce setup to specify which fields to include in the layout.
Case Deflection	Click to expand the section with case deflection properties.
`Use Case Text to Suggest Articles`	Uses the text users type in the case title and description fields to suggest articles in the deflection area of the page. Article deflection appears only when you've implemented Salesforce Knowledge in your org.
`Number of Articles`	Number of articles that display in the component.
`Top-Level Category`	Top-level data category for template-driven sites using data categories. This data category is where articles used for deflection come from.
Category Group name for article deflection	Data category group name for template-driven sites using data categories.
`Deflection Banner Text`	Text that displays as the title of the deflection area of the page. The default is Need Answers Fast?.
`Deflection Text`	Text that displays as the subtitle in the deflection area of the page.
`Mobile-Only Deflection Text`	Text that displays in the deflection area for users of mobile devices.
reCAPTCHA Settings	Click to expand the section with reCAPTCHA settings. Google no longer supports reCAPTCHA v1, which is the only version currently available in Experience Builder sites. In order to use reCAPTCHA v2 and above your sites, use a custom Lightning component.
`reCAPTCHA for Guest Case Creation`	Adds the reCAPTCHA widget to your page. The reCAPTCHA widget requires guest users to complete a text field successfully before they can create a case.
`Secret Key for reCAPTCHA`	Enter the key that you received when you registered for the service.
`Site Key for reCAPTCHA`	Enter the key that you received when you registered for the service. Make sure that you thoroughly test the reCAPTCHA widget in your production organization.

Example: Sample Create Case Form component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Migrate to the Contact Support Form and Case Deflection Components

If you built your Experience Cloud site before Spring `18, you could be using the Create Case Form component. A revamped version, ushered in with Spring `18, has split the component into two: the Contact Support Form and the Case Deflection components. We recommend you update your existing site to use the new components, as future updates and improvements are made on Contact Support Form and Case Deflection. Moreover, the new components allow you to use the Case Deflection Dashboard to verify the efficacy of your site's case deflection.

Replace the Case Create Form component with the Contact Support Form and Case Deflection components using the following steps.

Note: Enable Web-to-Case in your org if it's not already enabled.

1. Create a new page variation you can use for case deflection. In the Customer Service, make a variation of the Contact Support page. In the Customer Account Portal template, make a variation of the Contact Us page. We recommend the 2-column, 1:1 ratio layout.
2. Drag the Contact Support Form and Case Deflection components on the page. Configure the component properties.

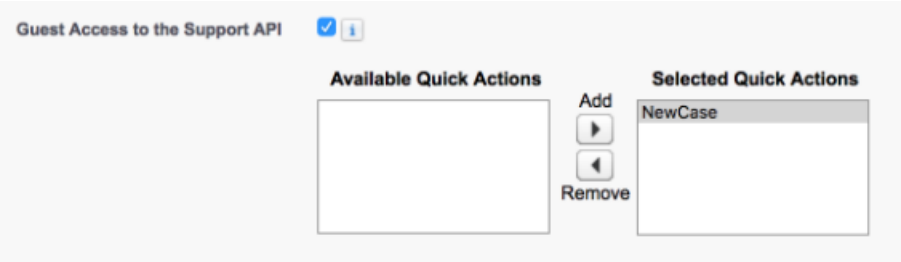
   Note: One of the properties on the Contact Support Form component is the global action used to create cases. Create new global actions in Salesforce Setup. For a global action to be used in the Contact Support Form component, it must be a **Create a Record** action type with the case object as the target.

3. Enable **Guest Access to the Support API**, and add the global actions you want to use.

a. In Salesforce Setup, enter `Sites` in the `Quick Find` box and select **Sites**.

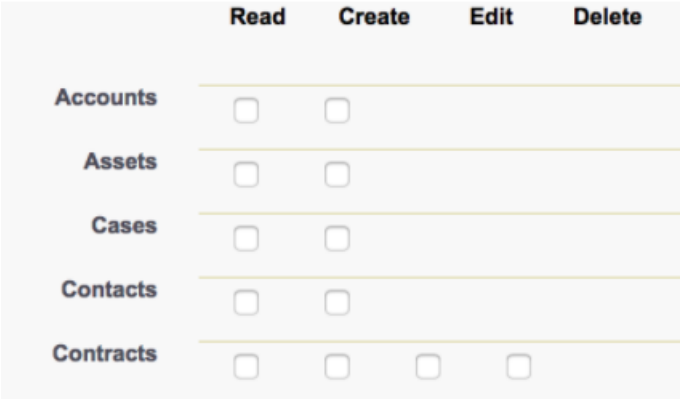
b. Select the **Guest Access to the Support API** checkbox to enable it.

c. Add your global actions to the **Selected Quick Actions** box.



d. Click **Save**.

4. Configure your site's guest user profile. Disable access to object permissions for guest users.



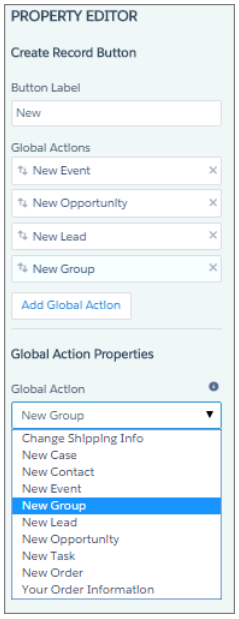
Note: Your guest users could need object permissions for custom objects, or other functionality in your site. Test your implementation so you have the best object permission configuration for your site.

Create Record Button

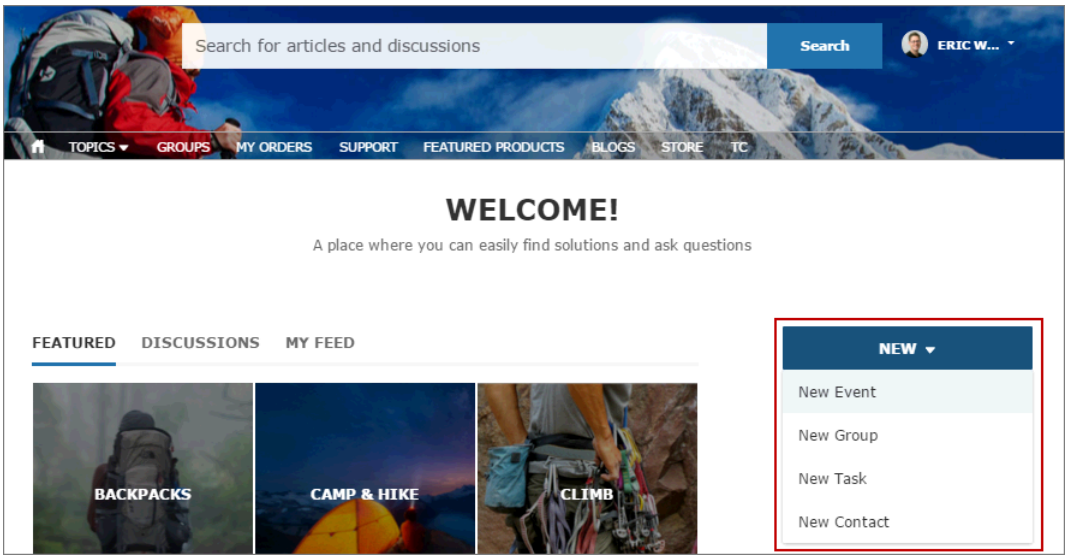
Use the Create Record Button component to allow site members to create records using global actions.

This component relies on the global actions defined in your org by the administrator. If you associate more than one action with this button, it acts like a dropdown list. When a site member selects an action from the list, the Create Record page dynamically loads the appropriate action layout for that action using the Create Record Form component.

1. Add the **Create Record Button** component to a page or select it on the page you're configuring. For example, you can add this component to the Home page to make it easy for site members to find.
2. Click **Add Global Action** to add an action to the Global Actions list.
3. Select each action and modify its type and public availability in the Global Action Properties section.
   - Select the global action type to be associated with each action in the Global Actions list.
   - Select Publicly Accessible to make that action available for guest users of the site.



Example: Sample Create Record Button component on a site home page.



Create Record Form

The Create Record Form component displays the action layout when a user clicks an action from the Create Record button.

When a site member clicks an action from the Create Record button in your site, they're redirected to the Create Record page, which uses the Create Record Form component to display the fields in the associated global action layout. The page and component automatically pick up the global action layout defined in Setup based on the clicked action and the Action Name property is automatically populated. No additional configuration is required.

1. Select the **Create Record Form** component in the page you're configuring.
2. In the property editor, configure the properties for the component:

Property	Details
Action Name	The API name of the action is automatically populated and doesn't require configuration.
Performance Settings	Click to expand.
`Create Records in Batches`	A global action that allows users to create cases, leads, and custom objects in batches, rather than one at a time. Batching creation increases the number of objects that can be created at a time for high-volume sites.

Example: Sample Create Record Form component.

CRM Analytics Dashboard

Use the CRM Analytics Dashboard component to add CRM Analytics to your site's pages.

1. Select the **CRM Analytics Dashboard** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Dashboard`	Select an available dashboard from the dropdown list.
`Height`	Specify the height of the dashboard, in pixels. The default is 300.

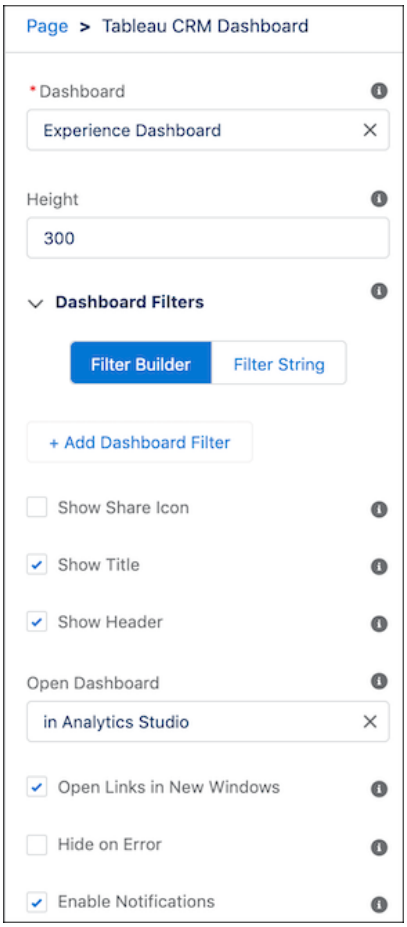
Property	Details

`Filter`	Add selections or filters to apply to the dashboard when it appears on the page at runtime. You can filter dataset fields by variables or specified values. For filtering on dimensions, use this syntax:
	`{'datasets' : {'dataset1': [ {'fields': ['field1'], 'selection': ['$value1', '$value2']}, {'fields': ['field2'], 'filter': { 'operator': 'operator1', 'values': ['$value3', '$value4']}}]}}`
	For filtering on measures, use this syntax:
	`{'datasets' : {'dataset1': [ {'fields': ['field1'], 'selection': ['$value1', '$value2']}, {'fields': ['field2'], 'filter': { 'operator': 'operator1', 'values': [[$value3]]}}]}}`
	`datasets` takes dataset system names which are found in the left panel of the edit page for a dataset. (If your org has namespaces, include the namespace prefix and two underscores before the dataset system name.)
	`fields` takes dimensions or measures in the dataset. To find the names, click the Explore icon to open the widget, select Show SAQL from the Options menu.
	`values` can be specific values or fields in a Salesforce object To find the name of a field, go to Setup, locate the object you want, and select Fields. Use the Field Name (also known as the API name). For custom fields, use the name with "__c" at the end.
	With the `selection` option, the dashboard is shown with all its data, and the specified dimension values are highlighted. The selection option can be used alone or with the filter option. Selection takes dimension values only. To use this option, the dashboard must include a list, date, or toggle widget that groups by the specified dimension.
	With the `filter` option, the dashboard is shown with only filtered data. The filter option can be used alone or with the selection option. Filter takes dimension or measure values.
	Use `operator` with the filter option. Supported operators for dimensions: in; not in; matches Supported operators for measures: = ; >= ; > ; <= ; <.

`Show Sharing Icon`	Add the Share icon on the dashboard. When this option is selected, users can click the icon to open the Share dialog, where they can post to Chatter and download images and data. To show the Share icon, the minimum dashboard height is 612 pixels. Default is false.
`Show Title`	Control the visibility of the dashboard title. When this option is selected, the dashboard's title appears above the dashboard. Default is true.
`Show Header`	Control the visibility of the dashboard header. When this option is selected, the dashboard is displayed with a header bar that includes the Open in Analytics icon, the date and time that the dashboard's data was updated, and the dashboard views menu. Note that the header bar also appears if either Show Sharing Icon or Show Title is selected.
`Open Links in New Windows`	Specify where links from the dashboard to other assets are opened. When this option is selected, links open in new windows. When this option isn't selected, links open in the same window. Default is true.

Property	Details
`Hide On Error`	Control whether or not users see a dashboard that has an error. When this option is selected, if the dashboard has an error, it won't appear on the page. When this option isn't selected, the dashboard appears but doesn't show any data. An error can occur when a user doesn't have access to the dashboard or it has been deleted. Default is false.

Example: CRM Analytics Dashboard component:



Custom Lightning Components

Build your own custom Lightning components to use in Experience Builder sites.

Note: As of API version 45.0, you can build Lightning components using two programming models: Lightning Web Components, and the original model, Aura Components.

To develop custom Aura components for your Experience Builder site, see Experience Cloud Developer Guide: Configure Drag-and-Drop Components for Experience Builder.

To develop custom Lightning web components for your Experience Builder site, see Lightning Web Components Developer Guide: Configure a Component for Experience Builder. You can't incorporate Lightning web components with the 2 column, 2:1 ratio, split-sidebar fixed page layout that's available in Experience Builder. Use a flexible layout to create a page or page variation in Experience Builder that's arranged the same way.

Custom Lightning components configured for Experience Builder sites behave just like standard template components. Drag the component to the page canvas. To edit its properties, select the component on the page canvas, and then enter changes in the floating component property editor.

Custom components appear in the Components panel along with your template's components.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

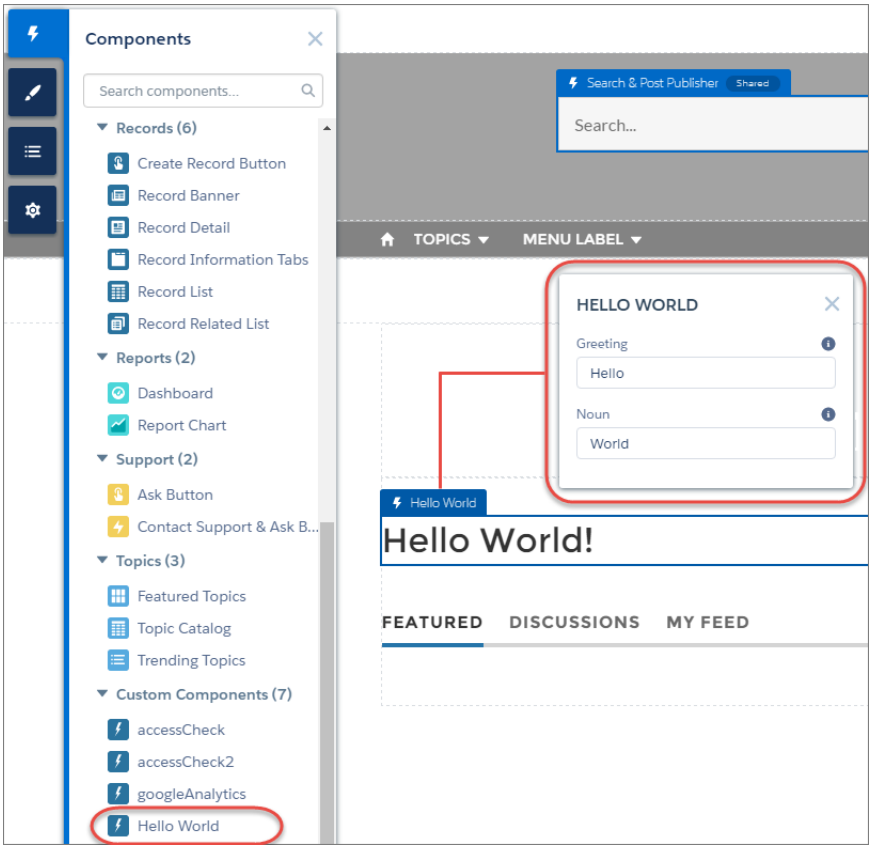
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Example: A custom component added to the page canvas, with properties open in the property editor:



SEE ALSO:

Create a Flexible Layout

Change the Content Layout in Experience Builder

Customize Code for Lightning Components on Login Pages

To add custom logic to the Login pages in Experience Builder sites, customize the Lightning component for those pages.

Each site has these default Login pages: Check Password, Forgot Password, Login, Login Error, and Register. And each Login page has a standard Lightning component that drives this functionality. If your company or site has any usability, security, or accessibility requirements that aren't supported by preconfigured login components, you can customize the login experience by creating custom components and adding code logic.

1. From Setup, in the Quick Find box, enter `Lightning Components`, and then select **Lightning Components**.
2. To customize a component, click the one that you want. For example, to customize the login experience, click loginForm.

EDITIONS

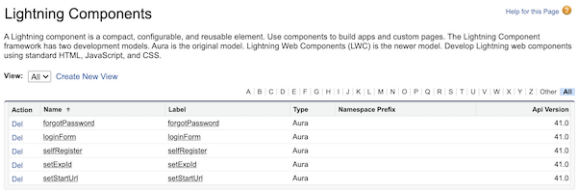
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

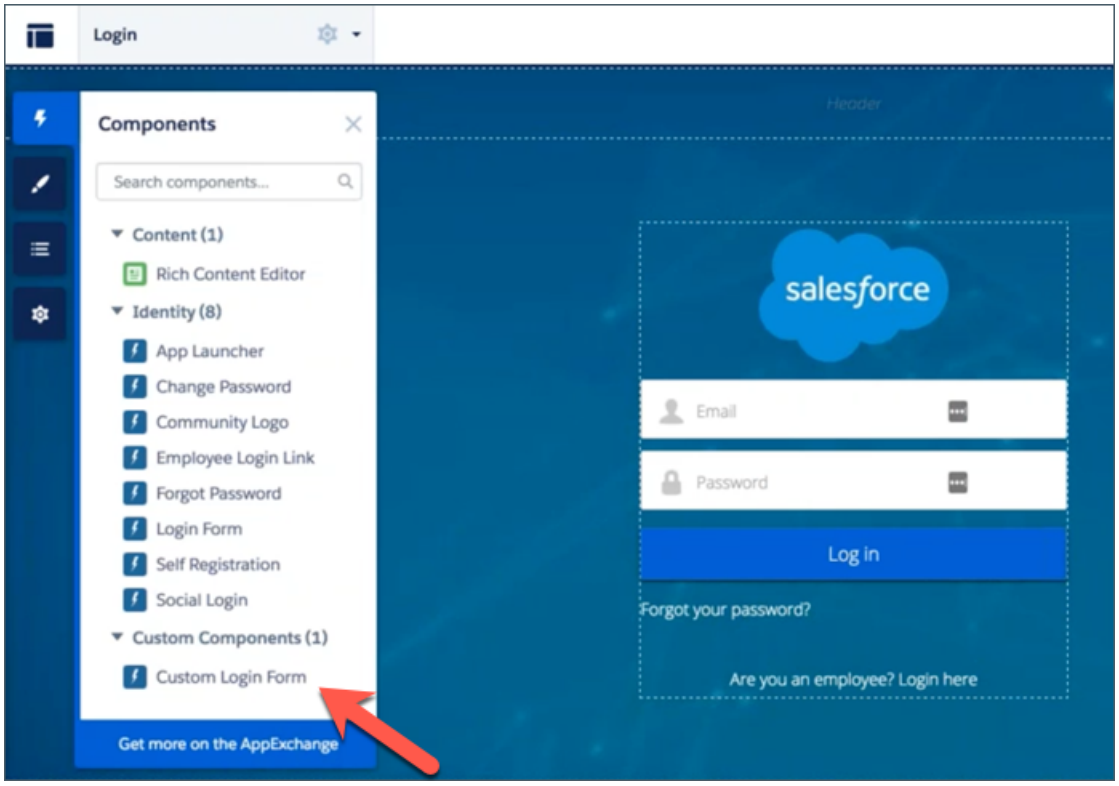
USER PERMISSIONS

To create and edit Lightning components:

- Customize Application



3. On the Lightning component detail page, click **Developer Console**.
4. In the Developer Console workspace, add `implements="forceCommunity:availableForAllPageTypes"` to the `<aura:component>` tag. Implementing the `forceCommunity:availableForAllPageTypes` interface exposes the component in Experience Builder.
5. Add custom code logic and save your changes as a new custom component.
6. Go back to Experience Builder in your site and bring up the Login page from the list of pages. The custom component you created appears on the list of components.



Customizable User Profile Menu

The Customizable User Profile Menu component displays a user's name or nickname and profile picture. It can also display a company name or icon. If the user isn't logged in, a Login button appears in the header. Starting in Summer '20, the Customizable User Profile Menu component replaces the User Profile component in Experience Builder sites using the new B2B Commerce Template and new sites using specific themes, including Ember, Stella, Webster, Citizen, Cypress, and Jepson. Existing sites using those themes get the new component instead of the old version when they reapply or change the theme.

1. In the page that you're configuring, click the header component to open the property editor.
2. Expand the Layout section, and select the Customizable User Profile Menu component in the User Profile Component dropdown.
3. Click the Customizable User Profile Menu component to open its property editor.

4. In the property editor, configure the properties for the component.

Property	Details
`Login Label`	Enter a label for the Login button that members use to log in to the site. The default is Log In.
`Text Color`	Choose the color of the text for the log in button.
`Text Hover Color`	Choose the color of the text when the user is hovering over the log in button.
`Background Color`	Choose the background color of the log in button.
`Background Hover Color`	Choose the background color to show when the user is hovering over the log in button.
`Border Color`	Choose the border color of the log in button.
`Border Radius (0px - 50px)`	Set the radius of the button border.
`Default Menu`	Choose the default navigation menu to show to authenticated users. To edit your menu selection, click the **Edit** button.
`Menu Style for Authenticated Users`	Choose whether to display a menu icon, the user's name, or both. On mobile devices, only the icon is shown.
`Icon`	Choose whether to use a company logo or an avatar as the menu icon.
`Include Company Name`	Opt to include the company name in the user profile menu. The default is to omit it.
`Text Orientation`	Choose whether to display the company name to the right or left of the icon.

Note:

- When you import a B2B Commerce template, the My Account and Lists options on navigation menus are dropped. Edit the menu, like the Customizable User Profile menu, and recreate these menu options.
- Menu item types system link and event display only in the Customizable User Profile Menu component.

Customizable User Settings

The Customizable User Settings component enables your users to customize their site settings.

Note: The Customizable User Settings component replaces the User Settings component, which was deprecated in Winter '21.

The customizable user site settings include changing language, locale, and time zone so that the site is localized appropriately. A user can also see their username, change their email or password, and deactivate their account. Users can choose to show their profile details to guest users who aren't logged in to the site. They can also choose to receive email based on events in the site. If users don't want to receive email about events in the site, they can disable email notifications. You can customize the labels on many of these fields.

1. Select the **Customizable User Settings** component on the page.
2. In the property editor, configure the properties for the component.

Property	Details
User Settings Header	Customizable label for the settings page. Default text is **My Settings**.
User ID	Value automatically retrieved by the system.
Account Tabs	
Account Management Tab Title	Customizable label for the Account Management tab. This tab's account details. Default text is **Account Management**.
Connected Sources Tab Title	Customizable label for the Connected Sources tab. This tab lists external and other data sources to which the user is connected. Default text is **Connected Sources**.
Hide the Connected Sources tab	Prevents the Connected Sources tab from appearing on the Customizable User Settings component.
Location	
Section Header	Customizable label for the Location section. This section includes language, locale, and time zone fields. Default text is **Location**.
Profile Visibility	
Hide section	Prevents the Profile Visibility section from appearing on the Customizable User Settings component.
Section Header	Customizable label for the Profile Visibility section. This section includes the option to restrict what others can see on a user's profile page. Default text is **Profile Visibility**.
Section Description	Customizable description of the Profile Visibility section. Default text is **Customize who is able to see what on your profile page.**
Section Hint Text	Customizable hint text that appears when users hover over the help icon next to the description. It defines each visibility level. Default text is **Restricted: Visible to the users who created the site. Members: Visible to logged-in members. Public: Visible to anyone viewing pages, logged in or not.**
Email Notifications	
Hide section	Prevents email notifications from appearing in a user's personal Chatter settings.
Section Header	Customizable label for the Email Notification section. The section includes options for enabling or disabling all or some email notifications. Default text is **Email Notifications**.
Section Description	Customizable description of the section that lists the various actions that send email notifications. Default text is **When email notifications are enabled**.
Hide feed notification options	Prevents feed and post notifications from appearing in a user's personal Chatter settings.
Account Details	If you have a Mobile Publisher for Experience Cloud app listed on the App Store, it's recommended that you customize the Deactivate Account Button label, and other Deactivate Account user settings, to use the term **Delete** rather than **Deactivate**. Learn more about this requirement.

Property	Details
`Section Header`	Customizable label for the Account Details section. This section includes the deactivate account fields. Default text is **Account Details**.
`Hide the Deactivate Account section`	Deselect to show the Deactivate Account section on your user's My Settings page. Before showing the Deactivate Account section, enable the **User Self Deactivate** setting from **Setup** > **User Management Settings**.
`Deactivate Account Section Label`	Customizable label for the Deactivate Account section. Default text is **Deactivate Account**
`Deactivate Account Button Label`	Customizable label for the Deactivate Account button. Default text is **Deactivate My Account**
`Deactivate Account Confirmation Title`	Customizable title of the confirmation message. Default text is **Deactivate your account?**
`Deactivate Account Confirmation Message`	Customizable text of the confirmation message body. Default text is **After you deactivate your account, you'll lose access to this site.**
`Deactivate Account Confirmation Button Label`	Customizable label of the button for the popup confirmation message. Default text is **Got It**
`Deactivate Account Error Message"`	Customizable error message displayed if the user is unable to initiate deletion of their account. Default text is **Something went wrong. Contact your site administrator.**

Tip: For orgs where Single Sign-On (SSO) is enabled, consider hiding the Change Password link on a user's My Settings page.

a. In Setup, create a permission set, for example `Single Sign On Link`.

b. In System permissions, set "Is Single Sign-On Enabled" to `On`.

c. Assign the permission set to appropriate users in your org.

The "Change password" page no longer appears on their My Settings page.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Set Up and Maintain Your Salesforce Organization: Enable User Self-Deactivation

Set Up and Maintain Your Salesforce Organization: Let Users Scramble Their User Data

Data Protection and Privacy: Data Deletion for Experience Cloud Sites

Data Protection and Privacy Help: Data Deletion for the Salesforce Platform

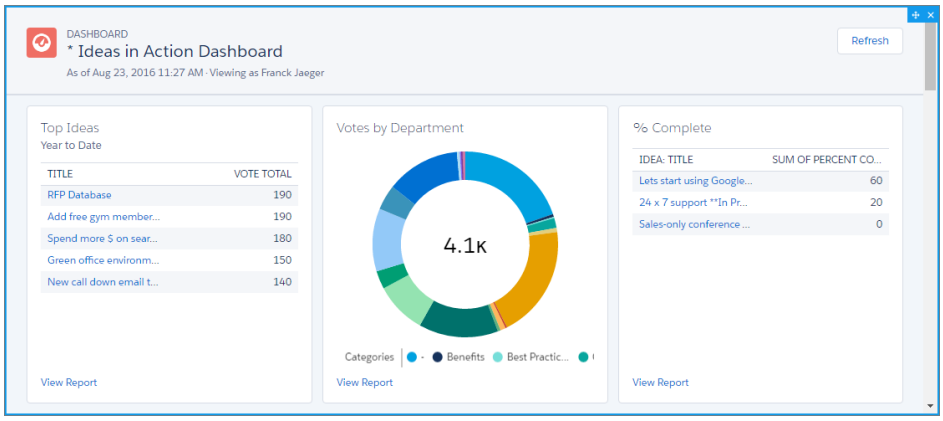
Dashboard

Use the Dashboard component to add dashboards you set up in your org's public folder to your site's pages.

1. Select the **Dashboard** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Dashboard Name`	Select an available dashboard.
`Height`	Adjust the height of the dashboard. Column width controls the dashboard width.

Example: Sample Dashboard component:



Note:

- Members can't change the dashboard's running user in the site. This view is read only.
- The refresh button isn't available in Experience Builder sites on mobile devices.
- Dashboards data is automatically refreshed when viewed in Experience Sites.

Dashboard List

The Dashboard List component lets users view dashboards in list form.

The dashboard list can be filtered with these criteria:

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

In addition, users have access to dashboard folders. Folders include:

- Created by Me
- Shared with Me
- All Folders

The Dashboard List component doesn't have any editable properties.

Note: The Dashboard List component can only be used on the Dashboard List page.

Deflection Tracking

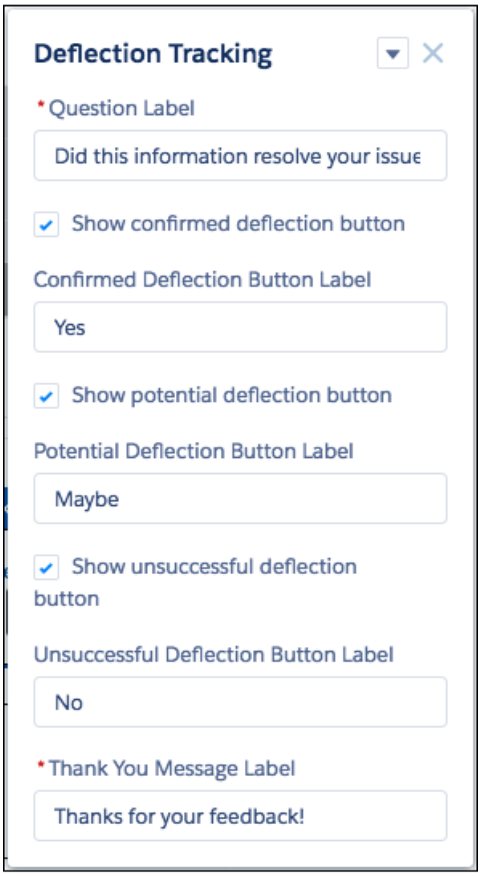
The Deflection Tracking component gathers data from users about the deflection content that you provide. Prompt users with a customized set of answers, and capture their feedback in your Salesforce org. Use the Salesforce Case Deflection Reporting Package for Experience Builder sites to build reports about the effectiveness of your deflection content. Reports help you plan your content strategy with the support of real data.

1. Select the **Deflection Tracking** component, and drag it onto any Feed Detail, Question Detail, or Article Detail page. Avoid placing the component in the template header or footer of the page. Doing so causes the component to appear on all pages.
2. In the property editor, configure the properties for the component.

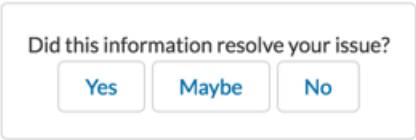
Property	Details
`Question Label`	Enter a prompt that asks users if they're satisfied with the suggested content. Default text is: **Did this information resolve your issue?**.
`Show confirmed deflection button`	Select to include a confirmed deflection button that users click to confirm that the information resolved their issue.
`Confirmed Deflection Button Label`	Enter a label for the confirmed deflection button. Default text is: **Yes**.
`Show potential deflection button`	Select to include a potential deflection button that users click to show that the information possibly resolved their issue.
`Potential Deflection Button Label`	Enter a label for the potential deflection button. Default text is: **Maybe**.
`Show unsuccessful deflection button`	Select to include an unsuccessful deflection button that users click to show that the information didn't resolve their issue.
`Unsuccessful Deflection Button Label`	Enter a label for the unsuccessful deflection button. Default text is: **No**.
`Thank You Message Label`	Enter a message thanking the user for their response. Default text is:**Thanks for your feedback!**.

3. Publish the page.

Example: Sample Deflection Tracking component set up in Experience Builder:



Sample Deflection Tracking component in viewable user page:



Install the Salesforce Case Deflection Reporting Package to see how well the Deflection Tracking component actually deflects cases from being created. Use the Community Case Deflection Metrics dashboard to get metrics on potential and confirmed case deflections and the most helpful articles and discussions.

SEE ALSO:

Case Deflection

Ask Button

Contact Support & Ask Buttons

Experience Cloud Developer Guide: Report on Deflections: The Deflection Signals Framework

Einstein Predictions

The Einstein Predictions component lets users display predictions and improvements for a standard or custom object on an Experience Builder site page.

After a model is deployed, you can use it to display predictions and improvements for a standard or custom object on an Experience Builder site page.

1. In Experience Builder, open the Experience Builder site page to which you want to add a prediction.
2. Drop the Einstein Predictions component where you want it on the page.
3. In the component configuration panel, use the `Prediction` lookup to find and select the prediction you want to embed in the site page.
4. Optionally, configure other properties for this prediction as well.

Property	Description
`Prediction`	Search for a list of any predictions (deployed models) to which you have access.
`Show Prediction Label`	Select this checkbox to show the prediction label.
`Title`	Descriptive label for the prediction.
`Show title`	Select this checkbox to show the title.
`Prediction score unit`	Unit of measure for the prediction. Examples: • Currency for money-based predictions • % for probability-based predictions • time interval for time-based predictions (hours, days, weeks, and so on)
`Unit precedes score`	Select this checkbox to show units preceding the prediction, such as currency symbols. By default, units follow the prediction.
`Positive prediction label`	Label to display when the prediction is higher than the threshold in a binary classification model. Examples: Win, Retain, Success, and so on.
`Negative prediction label`	Label to display when the prediction is lower than the threshold in a binary classification model. Examples: Loss, Churn, Fail, and so on.
`Show top predictors`	Select this checkbox to show the predictors with the highest impact on the prediction.
Collapse details	Select this checkbox to show top predictors but hide other details.
`Show ranked probabilities`	Select this checkbox to show ranked probabilities for outcome values. Applies only to predictions associated with multiclass classification models.

USER PERMISSIONS

To add the Einstein Predictions component to an Experience Builder site page

- Create and Set Up Experiences AND
- Is a member of the site

To view predictions on a site page

- View Einstein Discovery Recommendations

Property	Description
`Include link to model card`	Select this checkbox to show the **Learn about this model** link that users can click to see the model card associated with this prediction.
`Show improvements`	Select this checkbox to show Einstein Discovery suggestions on how to improve the predicted outcome. Applies only to predictions associated with binary classification or numeric models.
`Number of improvements to show`	Set the maximum number of improvements returned on the prediction card. Applies only to predictions associated with binary classification or numeric models.
`Improvement threshold percentage`	Specify a number to display only improvements that impact the predicted outcome by this percentage or higher. Applies only to predictions associated with binary classification or numeric models.
`Show values for predictors`	Select this checkbox to show the impact value next to predictors and improvements.
`Show prediction warnings`	Select this checkbox to show user warnings, such as: • missing fields that are required for the model • field values that are outside of the valid range used to build the predictive model
`Calculate prediction as a date`	Select this checkbox to show time-based predictions as based on a relative start date plus an offset value (the original prediction result).
`Start calculating date prediction from`	Select the date field to use for when to start calculating the predicted date.
`Time period`	Select the unit for the offset value (original prediction result) used to calculate the predicted date. • `Minutes` • `Hours` • `Days` • `Weeks` • `Months`
`Predicted date format`	Select how to display the predicted date. • `Time Remaining` formats the prediction according to the selected `Time period`. • `Specific Date` formats the prediction as a date according to the logged-in user's locale settings.
`Show prediction history starting from`	Select a reference point to display score history: • `Last change` • `Last week`

When a user views this site page, predictions are updated in real time. No writeback to Salesforce is needed.

Einstein Scoring

Partners can see how well their leads score according to your company's conversion patterns. Get Einstein Lead Scoring by adding the Einstein Scoring component to the detail pages of partners' leads in Experience Cloud sites.

Available for partners in supported Experience Cloud sites, accessed through Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** Editions with Sales Cloud or Service Cloud. A PRM add-on license is required for each partner user.

USER PERMISSIONS

To customize an Experience Cloud site:

- Create and Set Up Experiences AND Be a member of the site

  OR

  View Setup and Configuration AND Be a member of the site AND Be an experience admin, publisher, or builder in that site

To give partners access to these features, you must also set up Einstein Lead Scoring. Then, verify the required steps for adding the Einstein Scoring component in your Experience Cloud site. Not all steps are required for all templates.

1. If Einstein Scoring isn't preconfigured in your Experience Cloud template, add it.

   Einstein Scoring is only available for the Lead object detail page.

   a. Either Create Object Pages for Leads or Edit Object Pages for Leads that you're already using.

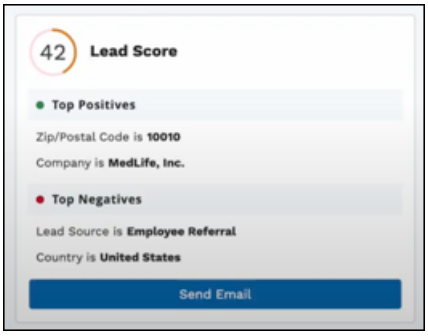
   b. From the Component menu, drag the **Einstein Scoring** component to the Lead detail page.

      The component displays best in a narrow page column.

2. If navigation for Einstein Scoring isn't preconfigured in your Experience Cloud template, add the Einstein Scoring detail page to the site's navigation menu. From the Settings menu, click **Navigation** and edit the navigation menu where you want partners to locate the page.

3. Publish the changes to your site.

Example: Einstein Scoring component:



SEE ALSO:

Set Up Einstein Lead Scoring for Partners

Engagement

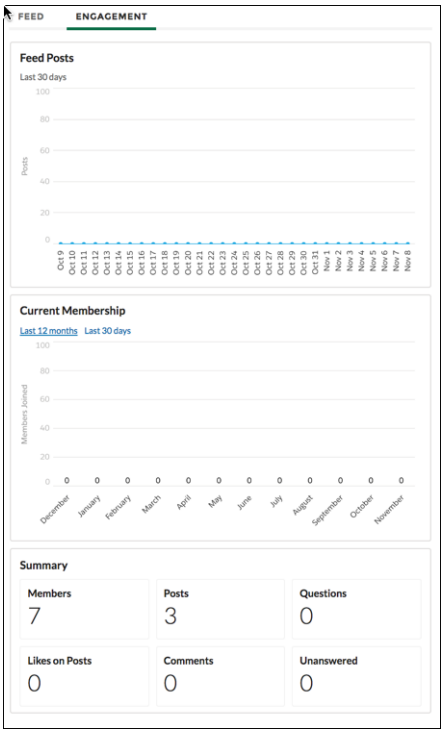
The Engagement component displays charts related to member engagement in the Chatter group.

The Engagement component is visible only to internal users who have reporting permissions in orgs that have group engagement. External users can't see the component even with Enable report options for external users turned on. You can also choose to make the component visible only to group managers.

1. Select the **Engagement** component in the page that you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example:



Enhanced List View

Partners can better prioritize selling when they can see activity frequency metrics for their contacts, leads, and opportunities, and get insights on their deal health. Use the Enhanced List View component to give partners access to Contact Intelligence View, Lead Intelligence View, and Pipeline Inspection from their Experience Cloud sites.

Available for partners in supported Experience Cloud sites, accessed through Lightning Experience in **Enterprise**, **Performance**, and **Unlimited** Editions with Sales Cloud or Service Cloud. A PRM add-on license is required for each partner user.

To give partners access to these features, you must also complete basic Contact Intelligence, Lead Intelligence, and Pipeline Inspection setup requirements. Requirements include assigning corresponding permission sets. Then, verify which steps you must complete based on when you create your site, the features you choose to enable, and the Experience Cloud template you're using. Not all steps are required for all templates.

USER PERMISSIONS

To customize an Experience Cloud site:

- Create and Set Up Experiences AND Be a member of the site

  OR

  View Setup and Configuration AND Be a member of the site AND Be an experience admin, publisher, or builder in that site

1. If the feature you want to enable isn't preconfigured in your Experience Cloud template, create a page for it.

We recommend creating a separate page for each Enhanced List View feature (Contact Intelligence View, Lead Intelligence View, Pipeline Inspection). Only one feature can be displayed per component, and the Enhanced List View component displays at full screen.

a. Create a Standard Page with a flexible layout.

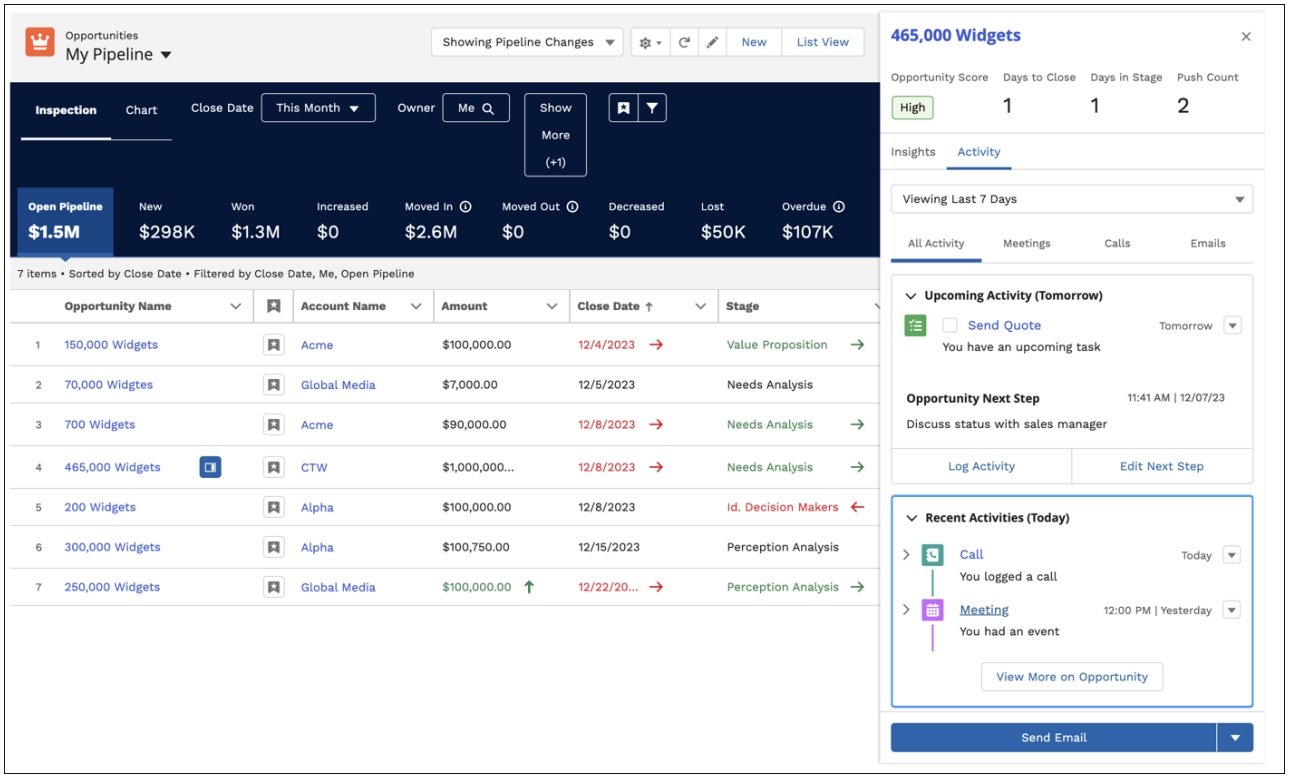
b. From the Component menu, drag the **Enhanced List View** component to the page, and select it.

c. In the property editor, configure the properties for the component

Property	Details
`Object`	Select the object that corresponds with the feature you want to add to this page (Contacts, Leads, or Opportunities)

2. If navigation for the feature you want to enable isn't preconfigured in your Experience Cloud template, add the Enhanced List View page to the site's navigation menu. From the Settings menu, click **Navigation** and edit the navigation menu where you want partners to locate the page.
3. Repeat steps 1–2 for each Enhanced List View feature (Contact Intelligence View, Lead Intelligence View, Pipeline Inspection) that you want to add a page for.
4. Publish the changes to your site.

Example: Enhanced List View component for Pipeline Inspection:



SEE ALSO:

Set Up Contact Intelligence View and Lead Intelligence View for Partners

Set Up Pipeline Inspection for Partners

Embedded Appointment Management

The embedded Appointment Management component allows users to schedule, modify, or cancel an appointment.

Important:

- Make sure to set up Field Service, build the flows you need, and install the Salesforce Field Service managed package before adding this component to your site pages.
- Remove the Embedded Chat component from the site pages where you want to use this component. You can use one embedded component per page.

1. Select the embedded Appointment Management component in the page that you're configuring.
2. In the property editor, configure the properties for the component:

Property	Details
Embedded Service Deployment	Select an embedded Appointment Management deployment.
Logged In Button Label	Enter a label for the appointment manager when users are logged in. The default label is `Book Appointment`.

Property	Details
Logged Out Button Label	Enter a label for the appointment manager when users aren't logged in. The default label is `Log In and Book Appointment`.
Button Loading Message	Enter a label for the appointment manager when the flow is loading. The default label is `Loading...`.

Embedded Messaging

Use the Embedded Messaging component to add Messaging for Web to your Experience Cloud site.

Note the following considerations before you begin.

- If you use the Embedded Service or Channel Menu components on your Experience Builder site, remove them. Use the Page Structure panel to find and remove the extra components.
- To effectively iframe your website and reduce JavaScript library conflicts, Messaging for Web creates a unique site that appears in your All Sites list in Setup. Don't reuse this generated site URL, which has reduced security, for other purposes. Don't modify this generated site through Builder or Workspace links.

1. Complete these setup steps for Messaging for Web.
2. For Experience Builder sites, from the Experience Builder Components list, select the **Embedded Messaging** component and drag it onto the page that has the Experience Builder site as the host domain value.
3. From the Experience Builder Components list, select the **Embedded Messaging** component and drag it onto the page that has the Experience Builder site as the host domain value.
4. On the page, select the **Embedded Messaging** component.
5. In the property editor, configure the properties for the component:

Property	Details
Embedded Web Deployment	Choose your Embedded Service Deployment for Messaging for Web.
Enhanced Service URL	Select the URL from your Messaging for Web setup, which matches the `scrt2` field in your code snippet.
Site Endpoint	Select the site endpoint, which matches the site endpoint on the Embedded Service Deployment Settings page for your deployment.
Chat Button Visibility	Default Visibility means that the chat button is shown by default or according to any business hours that are configured. Always Visible overrides your existing visibility settings and ensures that the chat button is always shown on page load. Always Hidden overrides your existing visibility settings and ensures that the chat button is always hidden on page load.

After publishing your site, the conversation and active messaging button appears on your site. Experience Builder helps you design the experience but is nonfunctional.

The component uses your default site language unless you enable a new language in Translation Workbench.

Make sure to return to the messaging for web deployment configuration instructions and complete the CORS allowlist step.

Important: Place the component only in a template region. Adding to a non-template region can cause disruption in the messaging experience.

SEE ALSO:

Set Up Messaging for In-App and Web

Configure a Messaging for Web Deployment

Embedded Service

The Embedded Service component allows users to request a chat with a support agent.

Important:

- Make sure to set up Chat and Embedded Service before adding this component to your site pages. For help, see "Set Up Embedded Service for Your Website" in Salesforce Help.
- Remove existing Chat buttons from the site pages where you want to use the Embedded Service component. If you don't remove Chat buttons, the component doesn't work.

1. Select the Embedded Service component in the page that you're configuring.
2. In the property editor, configure the properties for the component:

Property	Details
Chat Deployment	Select an Embedded Chat deployment.
Display Chat Button	Display the chat button to users.
Fill in Pre-Chat Fields	When selected, the name and email fields on your pre-chat form are pre-populated for logged-in users.
Button Label	Enter a label for the chat button. The user sees this text before they start a chat. The default label is `Chat with an Expert`.
Offline Button Label	Enter a label for the chat button when there are no support agents available to chat. The default label is `Agent Offline`.
Offline Support Button Label	Enter a label for the chat button when there are no support agents available to chat, and your Embedded Service deployment has offline support enabled. Offline support lets you present a web-to-case form inside the chat window when agents are offline. The default label is `Contact Us`.
Chat Waiting Message	Enter a label for the chat button when a chat has been requested and is waiting for an agent. The default label is `Loading....`.

Property	Details
Chat Waiting Background Image URL	Enter a URL for an image to display in the chat window when a chat is waiting for an agent.
Agent Avatar Image URL	Enter a URL for an agent avatar image to display in the chat window. This avatar applies to all agents taking chats from this button. We recommend using an image no larger than 40x40 pixels
Pre-Chat Background Image URL	Enter a URL for a banner image to display in the chat window while the user fills out the pre-chat form.
Code Setting Name	Enter the code setting name from Embedded Chat setup and load JavaScript files you've added as static resources.
Company Logo URL	Enter a URL for a logo to display in the minimized chat window when a chat is waiting for an agent. We recommend using an image no larger than 25x25 pixels.
Routing Order	Enter IDs for `userId`, `buttonId`, or `userId_buttonId`, separated by commas. This field sets a routing order to agents and chat buttons for the Embedded Service Deployment, which overrides the assigned Chat button.
External Scripts	Enter the static resource name for the external script used to create custom chat events. Use the name of the static resource object, like *`CustomEvent`*, instead of the name of the file itself.
External Styles	Enter the static resource name for the external style used to create custom chat events. Use the name of the static resource object, like *`CustomStyles`*, instead of the name of the file itself.
Storage Domain	Enter an existing site domain for your deployment. Let visitors navigate between subdomains during a chat session and ensure their continuous session continuity.

External Account Hierarchy List Card

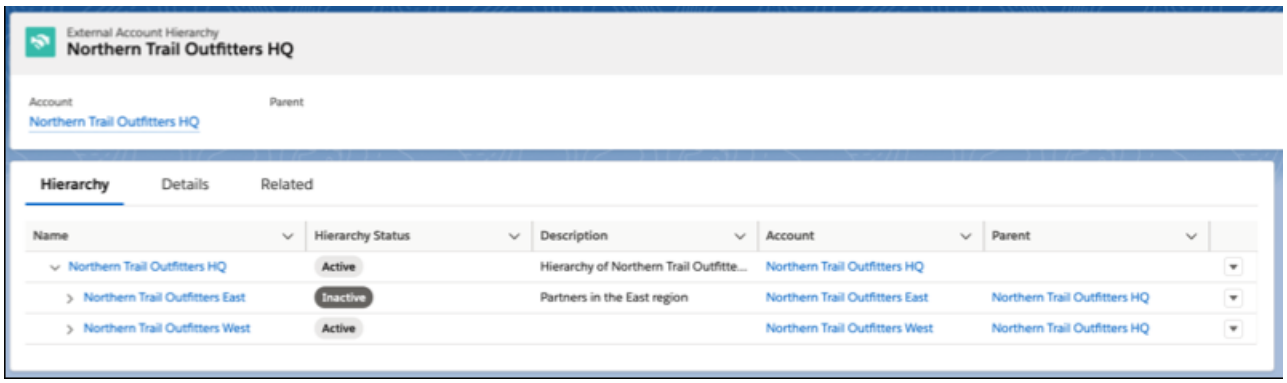
The External Account Hierarchy List card displays child and parent nodes within an external account hierarchy in list form. The hierarchical order of the accounts is represented by nested rows.

When you enable **Enable External Account Hierarchy** in Settings, external account hierarchies are available in your org.

1. Select the **External Account Hierarchy List Card** component on the page you're configuring.
2. In the property editor, configure the properties for the component:

Property	Details
`Hierarchy Type`	The type of hierarchy of which the accounts are added. The available values are `Partner` and `Customer`.

Example: Sample External Account Hierarchy component:



Featured Topics

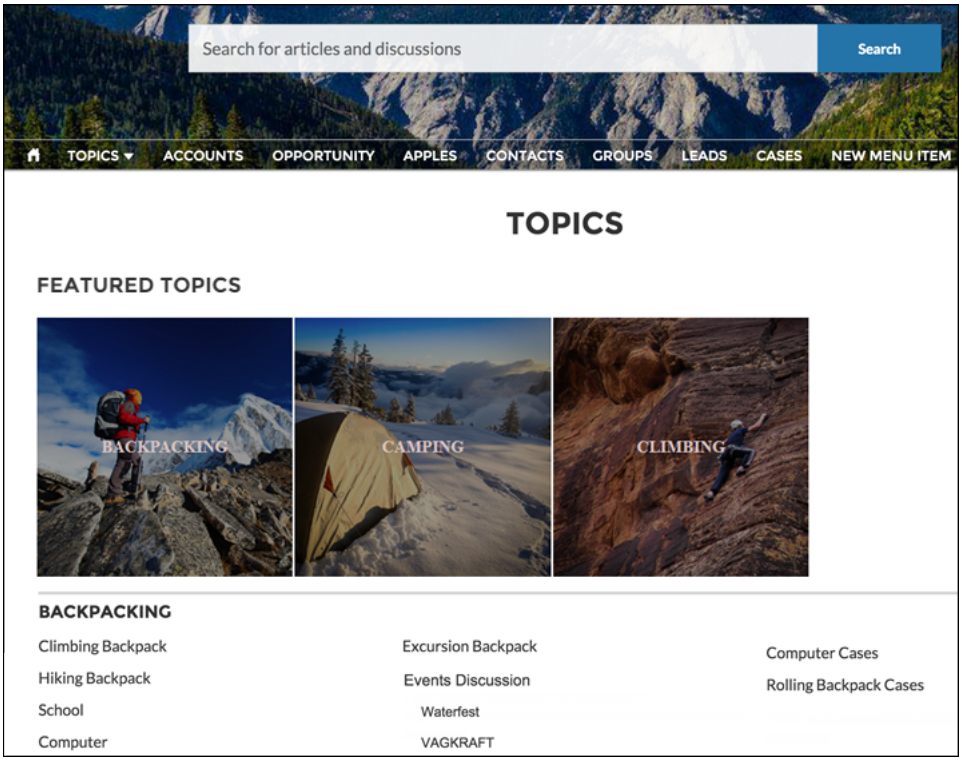
The Featured Topics component lets you place your Experience Builder site's designated featured topics and the images that represent them on any page.

1. From the Components list, select the Featured Topics component and drag it onto a page.
2. On the page, select the **Featured Topics** component.
3. In the property editor, configure the properties for the component.

Property	Details
`Title`	Enter a title for the featured topics area. The default text is `Featured Topics`.
`Show Title`	Check to show the title. Clear to hide the title.
`Overlay Color`	The color to use as a wash over the tile background color. In the property's **rgba** field, the default is `0,0,0,0.4`.
`Overlay Hover Color`	The color to use as a wash over the tile background color when a user mouses over the tile. The link icon indicates that the value is taken from the site's theme. In Builder, you can test your hover color in Preview mode.
`Border Radius`	Slide to adjust the curve of featured topic tile borders. If the component is in a narrow container, a round radius tends to look more oval. If you set border radius to `50`, very round, we recommend that you set Text Position to `left`, `right`, or `center`. The text background color is always rectangular, and placing text at the top or bottom of a circular tile truncates the background.
`Text Color`	Set the color of labels on featured topic tiles.
`Text Hover Color`	Set the color to use for a label when a user mouses over the tile. In Builder, you can test your hover color in Preview mode.
`Text Background Color`	Set the color to use for the tile background when it's inactive. In the property's **rgba** field, the default is `0,0,0,0`.

Property	Details
`Text Background Hover Color`	Set the color to use for the tile background when a user mouses over the tile. In the property's **rgba** field, the default is `0,0,0,0`. In Builder, you can test your hover color in Preview mode.
`Max Text Background Width`	Move the slider to control the width of the text background color. Width percentage is set against the full width of the tile. So 100% is the full width of the tile, rather than the full width of the browser page or the featured topic component. No matter what percentage you set, the text background width is always wide enough to support that label that sits on it.
`Text Position`	Select where to place text on a featured topic tile. • *`Top Left`* • *`Top Center`* • *`Top Right`* • *`Left`* • *`Center`* • *`Right`* • *`Bottom Left`* • *`Bottom Center`* • *`Bottom Right`*
`Text Alignment`	Set alignment of text within the text background. Select *`Center`*, *`Left`*, or *`Right`*. Alignment changes can be less noticeable when text background is narrow or text is positioned at the top or bottom of the tile.

Example: Featured Topics on the Topic Catalog page.



SEE ALSO:

Set Up Featured Topics

Featured Topics & Feeds

The Featured Topics & Feeds component gives members access to Featured Topics, Discussions, and My Feed in a tabbed setting. Site members must be logged in to see the My Feed tab. The Featured tab shows the featured topics you configured in the Content Management Workspace. You can boost your brand by providing images for featured topics. Topics and images are displayed as tiles on the Featured tab.

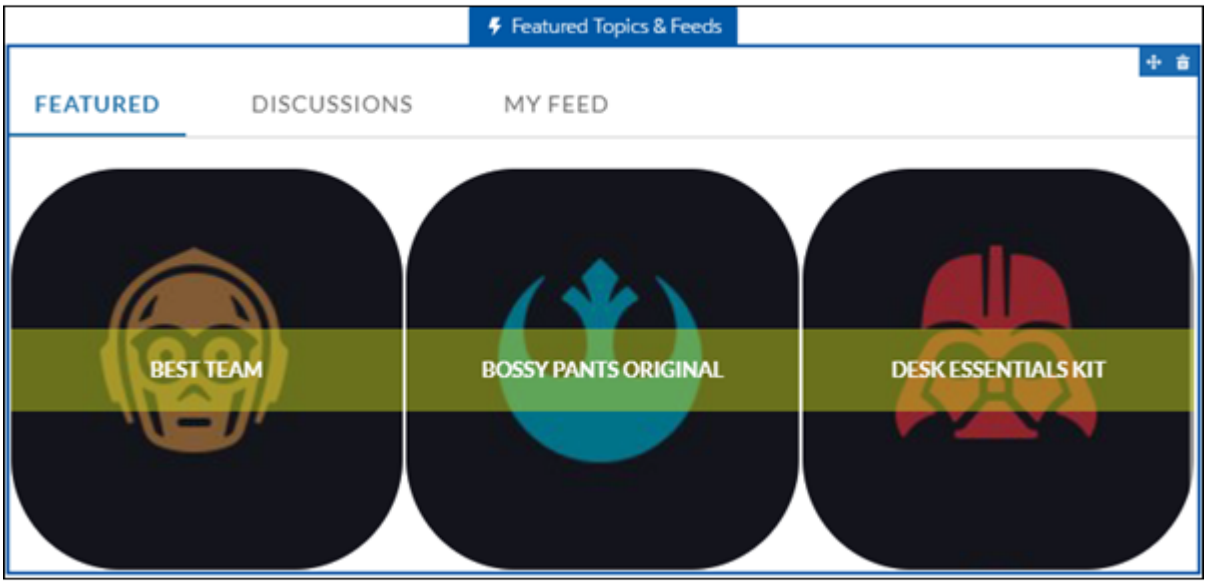
1. Select the **Featured Topics & Feeds** component in the page you're configuring or drag the component from the Components panel to the page.
2. In the property editor, configure the properties for the component.

Property	Details
`Featured Tab Label`	Enter a label for the Featured Topics tab. The default label is `Featured`.
`Discussion Tab Label`	Enter a label for the Discussions tab. The default label is `Discussions`.
`My Feed Label`	Enter a label for the My Feed tab. The default label is `My Feed`.
`Default Sort Order for Discussion Feed`	Present site members and guests with the initial feed sort order that you intend. If users change the sort order in their view, their selection sticks.

Property	Details
`Compact Feed in Discussion Tab`	Use the compact version of the feed on the Discussions tab. Compact feeds show only question titles and make it easier for users to scan the feed. Compact feeds don't support filters.
`Overlay Color`	The color to use as a wash over the tile background color. In the property's **rgba** field, the default is `0,0,0,0.4`.
`Overlay Hover Color`	The color to use as a wash over the tile background color when a user mouses over the tile. The link icon indicates that the value is taken from the Experience Builder's theme. In Experience Builder, you can test hover colors in Preview mode.
`Border Radius`	Slide to adjust the curve of the border around each featured topic tile. If the component is in a narrow container, a round radius tends to look more oval. If you set border radius to `50`, very round, we recommend that you set Text Position to `Left`, `Right`, or `Center`. The text background color is always rectangular, and placing text at the top or bottom of a circular tile truncates the background.
`Text Color`	Set the color of labels on featured topic tiles.
`Text Hover Color`	Set the color to use for a label when a user mouses over the tile. In Experience Builder, you can test hover colors in Preview mode.
`Text Background Color`	Set the color to use for the tile background when it is inactive. In the property's **rgba** field, the default is `0,0,0,0`.
`Text Background Hover Color`	Set the color to use for the tile background when a user mouses over the tile. In the property's **rgba** field, the default is `0,0,0,0`. In Experience Builder, you can test hover colors in Preview mode.
`Max Text Background Width`	Move the slider to control the width of the text background color. Width percentage is set against the full width of the tile. So 100% is the full width of the tile, rather than the full width of the browser page or the featured topic component. No matter what percentage you set, the text background width is always wide enough to support that label that sits on it.
`Text Position`	Select where to place text on a featured topic tile. • `Top Left` • `Top Center` • `Top Right` • `Left` • `Center` • `Right` • `Bottom Left` • `Bottom Center` • `Bottom Right`

Property	Details
`Text Alignment`	Set alignment of text within the text background. Select `Center`, `Left`, or `Right`. Alignment changes can be less noticeable when text background is narrow or text is positioned at the top or bottom of the tile.

Example: Sample Featured Topics & Feeds component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Feed

The Feed component displays a feed of all record or group interactions, including posts, questions, system updates, and attachments.

Use the Feed component to add a feed to a record, topic, group, user profile, or site discussion. The component provides a chronological, filterable list of posts made with the Feed Publisher component. Users who click a post's timestamp are directed to an expanded view, which shows the post and all its related comments.

Comments and attachments on posts appear inline below the post for desktop and tablet users.

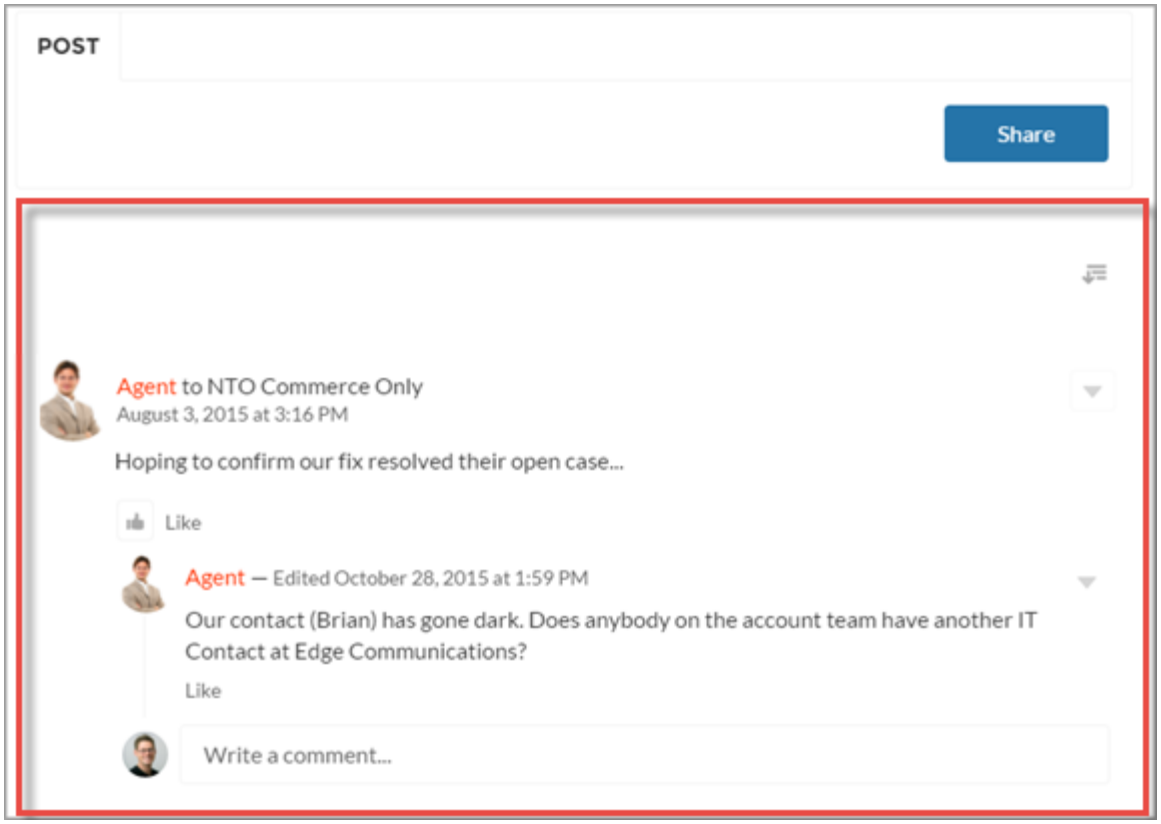
1. Select the **Feed** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Feed Type`	Select the type of feed you want to place on your page. Types include: • `Group or Record`—Group or Record feed shows everything that is posted to a selected group or record, like an account or opportunity. • `Discussion`—Discussion feed shows everything that is posted to Navigational Topics. • `My Feed`—Shows feed items that are tagged with a topic, or a person or record that you follow. My Feed also shows all of your personal site activity. You see all shared feed items unless another person shared the item with a group that you aren't a member of. With public groups, you see the feed item that you shared despite not being a member. • `Topic`—Topic feed shows everything that is posted to a selected topic. • `User Profile`—User Profile feed shows everything that is posted for user profile feeds. • `Bookmarks`—Bookmarks feed shows everything that is posted for a selected bookmark. Search isn't supported on the `Topic` feed type. If you plan to make your feed searchable, select the `Group or Record` feed type. The `Group or Record`, `Discussion`, and `Topic` feed types support the Top Posts sort order, which sorts feed items based on relevance. Relevance is represented as a numeric score, and certain events, such as likes and comments, increase the score of a given feed item. The feed items with the highest scores within a given container, like topics or groups, represent posts with a high level of interest.
`Record ID`	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Discussion or My Feed options in `Feed Type.`
`Default Filter`	For feed entries that you want your site members to see, select the default filter.
`Default Sort Order`	The default sort order for the `Discussion` and `Topic` feed types. Presents site members and guests with the initial experience that you intend. If users choose to change the sort order in their view, their selection sticks.
`Post Style`	Choose to expand or collapse post comments by default.
`Let members search feeds`	Choose to let site members search an individual feed. Search isn't supported on the `Topic` feed type.
`Let members sort feeds`	Choose to let site members sort a feed. When sorting is enabled, members can sort a feed by the latest posts or most recent activity.

Example:

Note: Users who unfollow topics, users, or records stop seeing posts regarding those topics users or records from the time they unfollow. Older posts about those topics, users, or records are still visible on the feed.

Sample Feed component



Each feed type comes with a set of filters for limiting what's shown in the feed. This table lists and describes filter types, and it pairs filters with the feeds where they're available.

Note: The Bookmarks feed doesn't have any filters.

Filter Name	Description	Feed Types
All Updates	Shows all posts in a feed. No comments are shown. Click a post's date and timestamp to navigate to its detail view. The detail view includes all comments on the post.	• Group or Record • My Feed • User Profile
All Questions	Shows all the questions in the feed.	• Discussion • Group or Record • My Feed • Topic
Questions with Best Answer	Shows all questions with an answer that is marked as best.	• Discussion • Group or Record • My Feed • Topic

Filter Name	Description	Feed Types
Questions with No Best Answer	Shows all questions with answers, none of which is marked as best.	• Discussion • Group or Record • My Feed • Topic
Unanswered Questions	Shows the questions that aren't answered.	• Discussion • Group or Record • My Feed • Topic

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Feed Compact

Use the Feed Compact component to add a compact, scannable version of a feed to an object. Object types that take a compact feed include a record, a topic, a group, a user profile, or an overall site discussion. Feed Compact only shows questions in a feed, and is only recommended if the only feed type used is a question. The component provides a chronological list of questions made with the Feed Publisher component.

Compact feeds initially show only parent-level feed posts. Clicking a post takes you to the expanded post and all its related comments.

1. Select the **Feed Compact** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

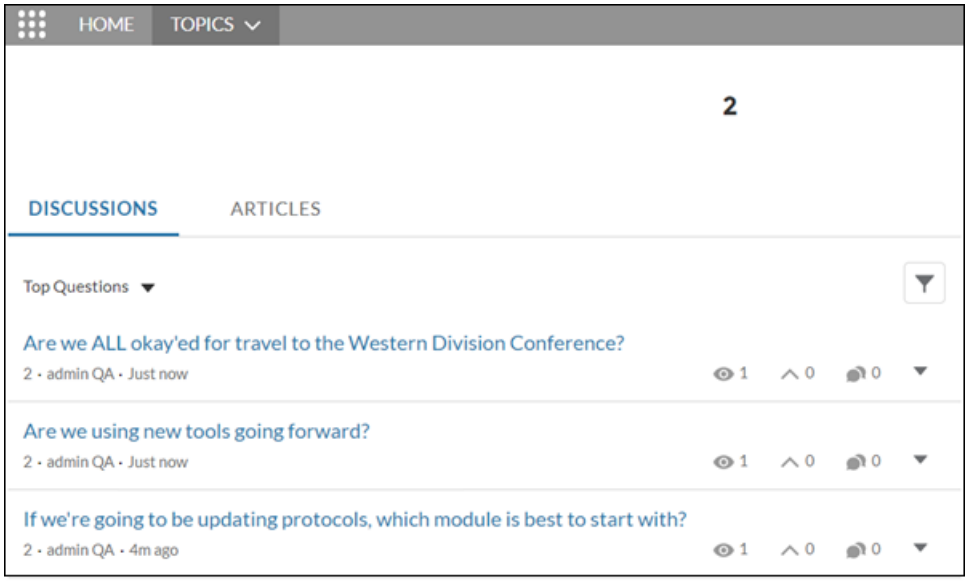
Property	Details
`Show Views`	Select to show the number of times an item is viewed 2. A view is counted when an item is liked, commented on, or its detail view is opened. Clear to hide the view count.
`Show Likes`	Select to show the number of likes for each post. Clear to hide the number of likes.
`Show Comments`	Select to show the number of comments for each post. Clear to hide the number of comments.
`Compact Feed Type`	Select the object or context you want to associate this feed with. Discussion—Shows all questions tagged with a navigational topic, for example *`#Q4wins`*. Users don't have to follow a navigational topic to see it in the discussion. And feed items that discuss the topic but don't have the tag don't appear in the discussion, even to users who follow the topic. Shared feed items appear in a Discussion feed only if the question posted with the shared item (the share message) includes the topic tag. Even if the shared item has a tag, it doesn't appear in the feed if the tag isn't included in the share message. • Group or Record—Shows all questions created on a record or in a group. • My Feed—Shows questions that are tagged with a topic, or person or record that you follow. My Feed also shows all questions related to your personal site activity. You see all

Property	Details
	shared feed items unless another person shared the item with a group that you aren't a member of. With public groups, you see the feed item that you shared despite not being a member. • Topic—Shows all questions that are tagged with the topic. Shared questions appear in a Topic compact feed only if the message posted with the shared item (the share message) includes the topic tag (for example, `#Q4wins`). Even if the shared item has a tag, it doesn't appear in the feed if the tag isn't included in the share message. • User Profile—Shows your personal site activity in terms of questions. • Bookmarks—Shows questions that you bookmarked.
`Entity Id`	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Discussion or My Feed options in `Compact Feed Type`. When you add the Compact Feed to a non-object page, such as a home page, the auto populated Entity ID displays only questions asked by the logged in user. If you want to display a full group or record or feed, change the Entity ID to the ID of the group or record you want to display.
`Default Sort Order`	The default sort order on a feed. Presents site members and guests with the initial experience that you intend. If users change the sort order in their view, their selection sticks.

Example:

Note: Users who unfollow topics, users, or records stop seeing posts regarding those topics users or records from the time they unfollow. Older posts about those topics, users, or records are still visible on the feed.

Sample Feed Compact component:



Feed Compact comes with a set of filters for limiting what's shown in the feed. This table lists and describes Feed Compact filter types.

Filter Name	Description
All Questions	Shows all questions in a compact feed. No answers are shown. Click a question or its date-and-time stamp to navigate to its detail view. The detail view includes all answers to the question.
Unanswered Questions	Shows all questions that aren't answered.
Questions with No Best Answer	Shows all questions with answers, none of which is marked as best.
Questions with Best Answer	Shows all questions that have an answer that's marked as a best answer.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Feed History

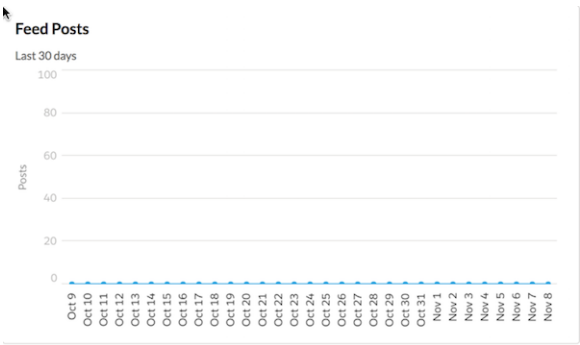
The Feed History component displays the number of posts per day in the past 30 days.

The Feed History component is visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

1. Select the **Feed History** component in the page that you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example:



Feed Post & Comments

The Feed Post & Comments component shows the detailed view of an individual post, comment, or question in the site feed. For questions, it includes the question, all the answers to that question, and an indication if it was escalated to a case.

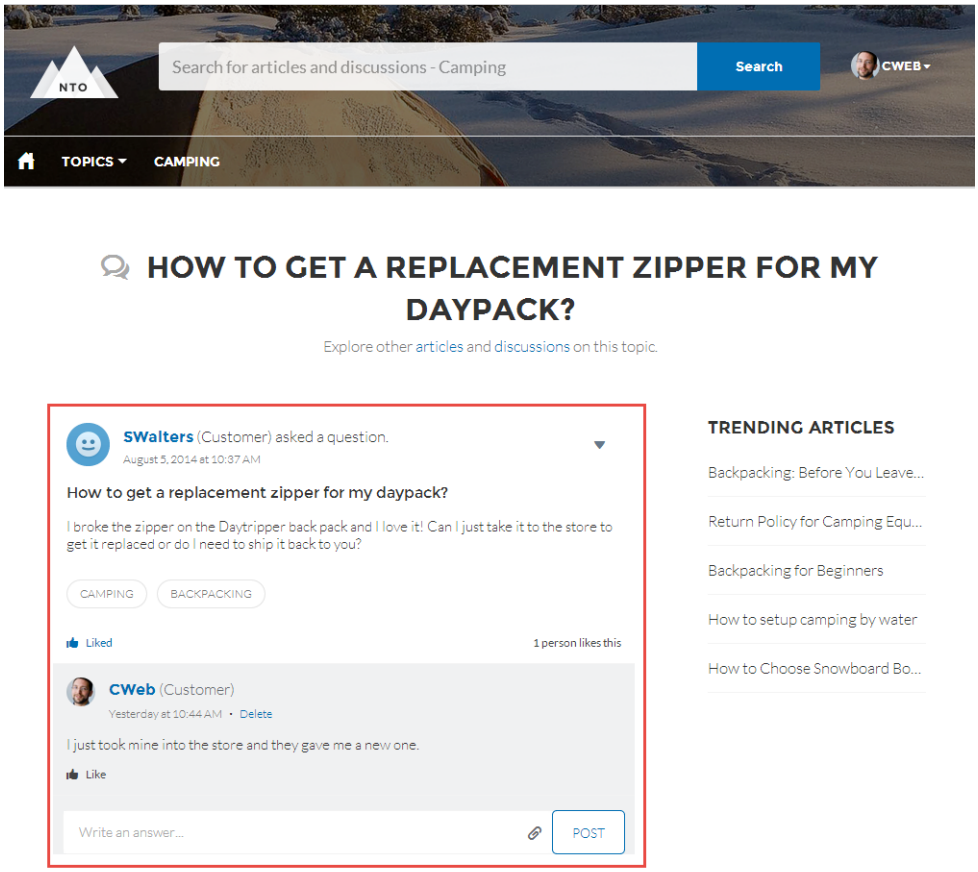
Only users who are logged in can post an answer to a question. Users can attach a file to a question or answer post by clicking the paperclip icon. They can choose to **Select a File** from files already uploaded to the site or **Upload a File** from the user's local drive.

When an answer is posted, users can click the dropdown button at the top right corner of the post to edit, bookmark, delete, or flag the post. Also, users can edit the topics associated with the post. The editing and flagging features must be enabled for the site.

1. Select the **Feed Post & Comments** component in the page you're configuring.

   There are no properties to set for this component.

Example: Sample Feed Post & Comments component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Feed Publisher

The Feed Publisher component lets customers create rich text posts on records, groups, topics, and profiles, and attach files from any of their devices. It also supports multiple file attachments, inline images, and rich link previews. The Feed Publisher component isn't supported for articles.

The Feed Publisher offers a way to add content to a site feed. It works together with the Feed and Feed Compact components. When site members create posts using the Feed Publisher, the posts are displayed in the related Feed or Feed Compact component on the page.

Note: The way the Feed Publisher component appears in Experience Builder mobile preview mode can differ from the way it appears in display mode. For example, let's say in Setup an admin adds actions to the global publisher layout. They add New Task, New Event, and Log a Call. Those actions appear in preview mode for both the desktop and mobile views of the publisher. But, after you publish your changes, the actions appear only in the desktop view, not in the mobile view. Only the Post action is available in both views.

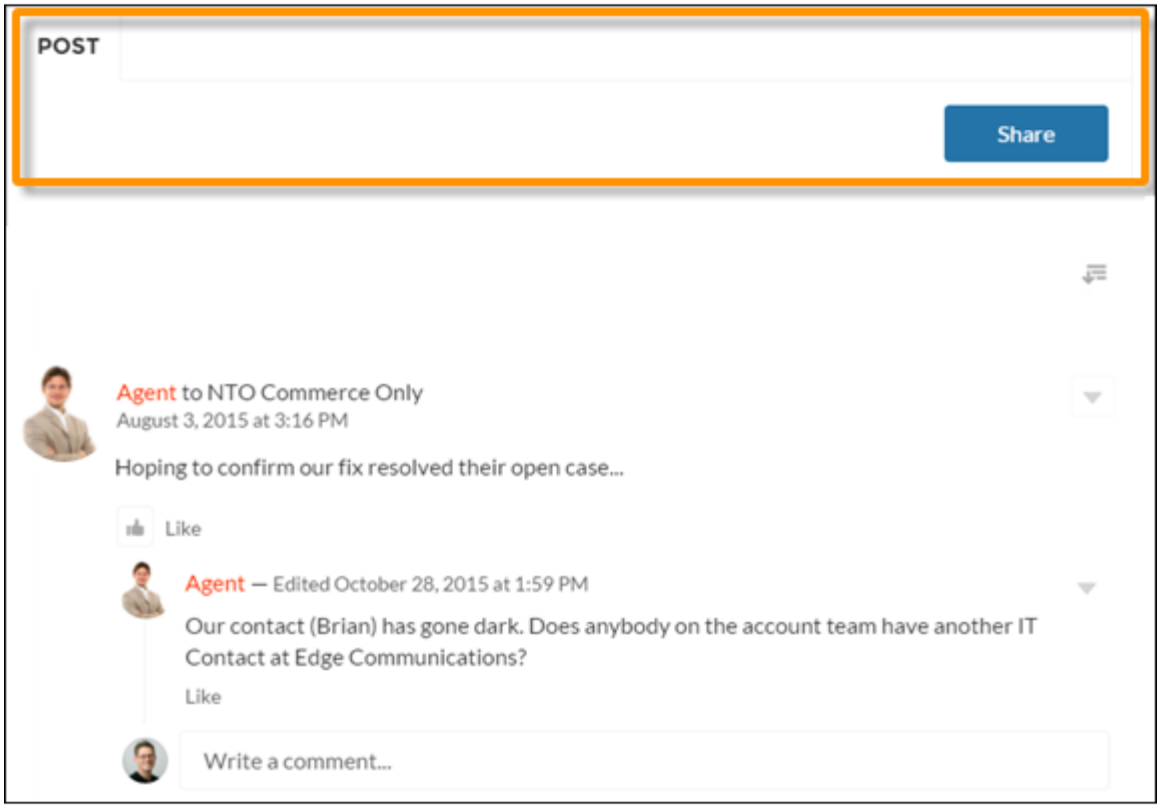
By default, the Feed Publisher lets users attach any supported file type up to 2 GB per file. For best performance, inline images up to 25 MB per image are recommended. Inline images over 25 MB appear at full size, and can be slow to load.

Note: Copying inline images from external sources and pasting them into the text editor isn't supported.

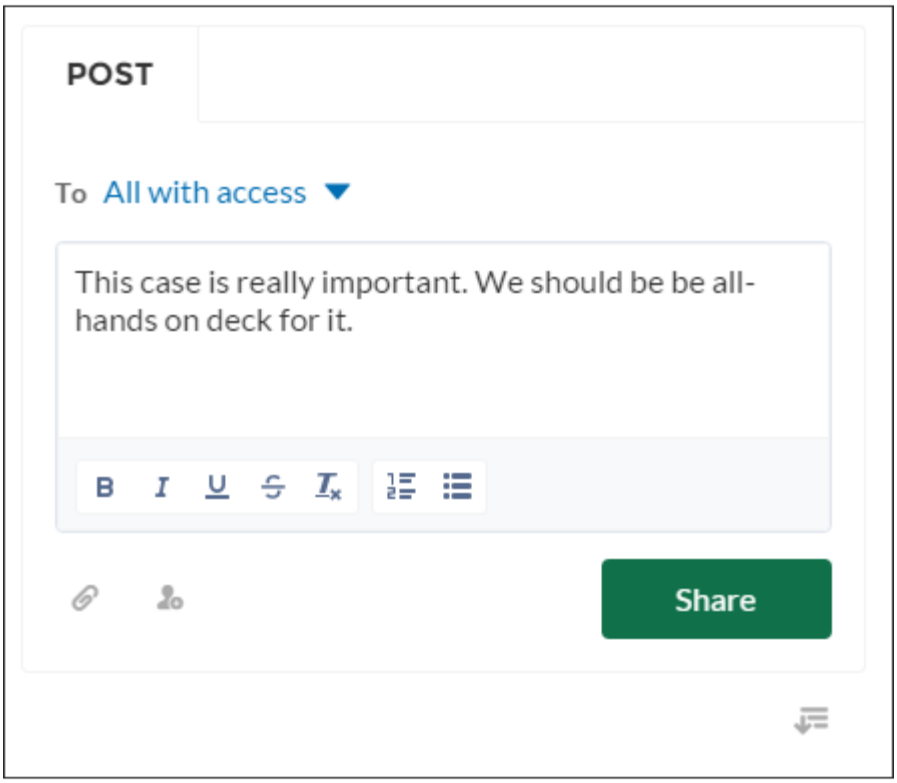
1. Select the **Feed Publisher** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Type`	Select the type of feed publisher you want to place on your page. To use global publisher actions defined in your Salesforce organization, choose Global. To use an object-specific publisher layout, choose Record. For example, use Record if you want to add the publisher to a custom group detail page. Use the publisher actions that are included in the group publisher layout for your org.
`Record ID`	The feed item ID. Typically, this field is automatically populated with the record ID when the page loads. Leave this field blank if you pick the Global feed publisher type.
`Publisher Layout Design`	Choose if you want to see the wide or narrow feed publisher layout design.

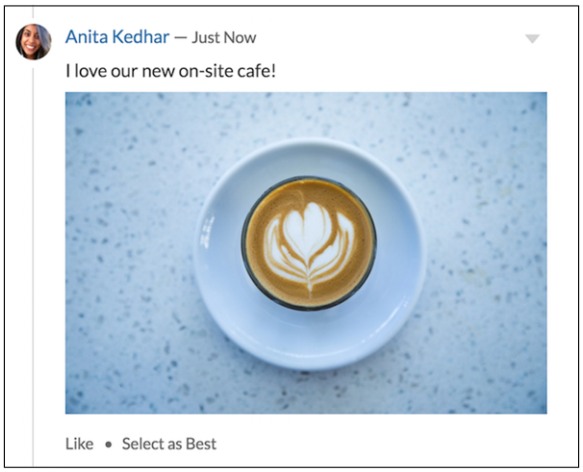
Example: Sample Feed Publisher component, wide layout



Example: Sample Feed Publisher component, narrow layout



Example: Sample feed post with inline image



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Files List

Use the Files List component in the Customer Service template to give site members a convenient place to view and manage their files.

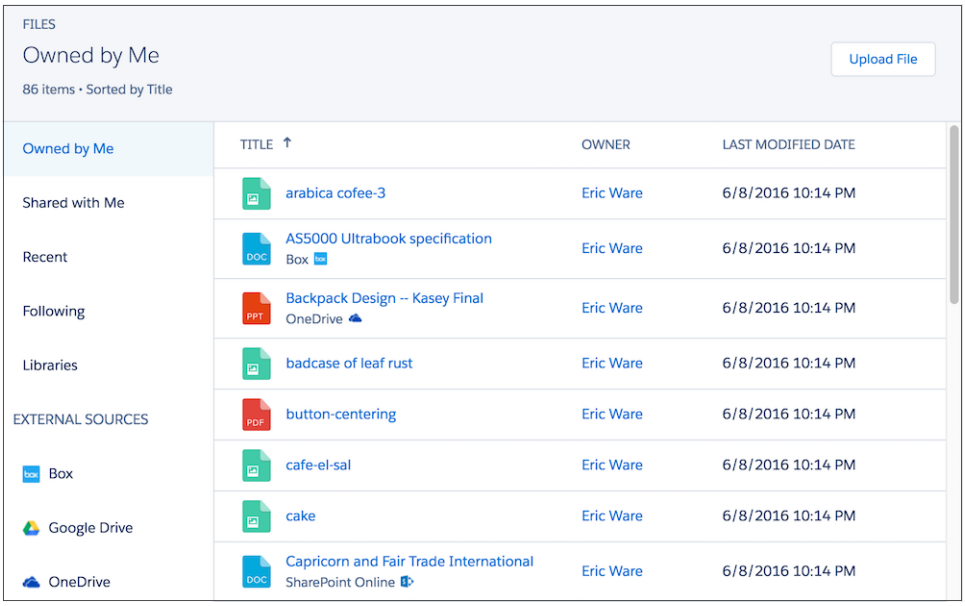
Members can upload, sort, and filter files using the files list. Clicking a file opens the file previewer, where members can upload a new version, download, and delete the file. Filters in the left sidebar show different selections of files. The Libraries filter shows files from Salesforce CRM Content libraries, and Files Connect users can see their external libraries under External Sources.

Note: A preview thumbnail is an easy way to find files in mobile and tablet views. A thumbnail view isn't yet available for desktop.

1. Select the **Files List** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Files List`	Modify the number of records that display in the window, from 10 to 100. A scrollbar appears to let users scroll to see more records

Example: Sample Files List component, wide layout

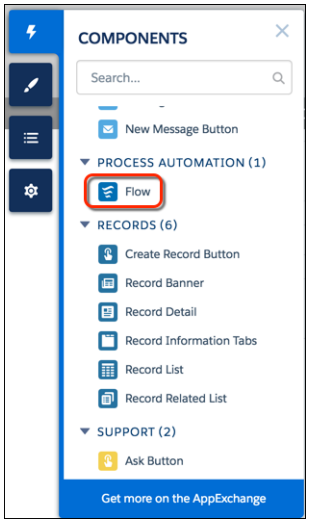


Flow (Experience Builder Component)

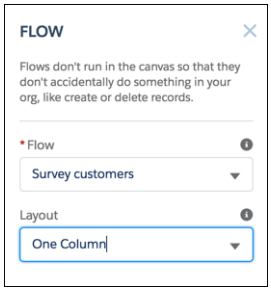
Flows automate business processes to collect, update, edit, and create Salesforce information. With the Flow component in Experience Builder, you can add flows to your pages. Add the Flow component to your site pages just like any other component.

- Flows in Experience Builder sites are supported through the Flow and Suggested Actions components.
- Flow creators can overwrite error messages with their own content.

1. Build a flow in Flow Builder.
2. Activate the flow.
3. Drag the Flow component into position on your site page.



4. In the property editor, select the flow you want to use and any other properties.



Here's a flow called Survey customers in a site.

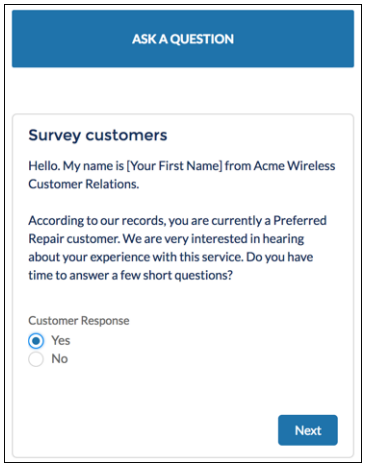
USER PERMISSIONS

To create an Experience Cloud site:
- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin or publisher in that site

To run a flow in an Experience Builder site
- Run Flows



Component	Description
Flow	Only active screen flows are available. Flows that were built in the Desktop Flow Designer aren't supported.
Layout	By default, flows display in one column. If a screen contains a Section screen component, that screen ignores the Layout property. • Starting in Winter '23, two-column flow layouts are ignored. For a better layout option, add Section components to your flow screens. Each Section component lets you organize record fields and screen components in up to four adjustable-width columns. • If a flow screen contains a Section component, that screen ignores the Layout property.
Input variables	If you see other properties, they're the flow's input variables. Variables appear only if they allow input access.
Pass record ID into this variable	This option is available only for Text input variables in Record pages. For simplicity, we recommend passing the ID to only one variable. For example, when this component is embedded in an Opportunity Record page, at run time the component passes the opportunity's ID into the selected input variable.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Build a Flow

Two-Column Flow Considerations

Customize the Error Message for Running Flow Users (Best Practice)

Lightning Aura Components Developer Guide: Create Custom Component for Guest User Flows

Allow Guest Users to Access Flows

Allow guest users to access flows within a site to create multi-part registration forms, decision trees, and conditional screens tailored to unauthenticated users. Flows give your guest users more flexibility to accomplish tasks and provide information before they have to register.

For every flow you want accessible to the guest user, you must provide individual access. To provide access:

1. From Setup, in the Quick Find box, enter `Flows`, and then select **Flows**.
2. Locate the flow to update and, from the actions dropdown next to the flow, select **Edit Access**. To appear in Experience Builder, your flows must be active screen flows.
3. Select **Override default behavior and restrict access to enabled profiles or permission sets**.
4. Save your flow.
5. Repeat this process with any flow that you want accessible to the Guest User profile.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Lightning Aura Components Developer Guide: Create Custom Component for Guest User Flows

EDITIONS

Available in: **Salesforce Classic** and **Lightning Experience**.

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create, customize, or publish a site:

- Create and Set Up Experiences AND View Setup and Configuration

Allow Guest User Access

To allow guest user access from Experience Builder:

1. Go to **Settings**.
2. On the General tab, select **Guest users can see and interact with the site without logging in** and then click the guest user profile.
3. Under Enabled Flow Access, click **Edit**.
4. Choose flows from the **Available Flows** column and add them to the **Enabled Flows** column.
5. Save your work.
6. For LWR sites, return to Experience Builder and click **Workspaces** > **Administration**.
7. Click **Preferences** and select **Allow guest users to access public APIs**.
8. Save your work.

To use Guest User Flows for login or self-registration, a developer must create a Lightning component that implements `lightning:availableForFlowsScreens`. They must also create an Apex controller for that component that uses the API exposed on the site object.

Add a Flow to Your Login Page

To add a flow to your login page from Experience Builder:

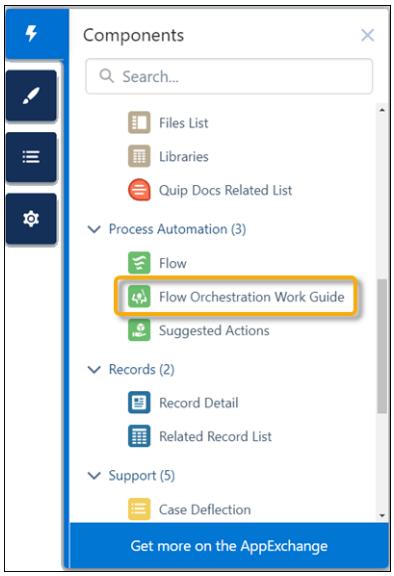
1. Go to the Login page and add the Flow component.
2. In the properties panel, select a predefined flow and a layout.
3. Edit the audience and assign it to Guest.
4. Delete the Login Form component.

Flow Orchestration Work Guide

Use the Flow Orchestration Work Guide component to allow site visitors the ability to complete the screen flows that they're assigned. An orchestration is a sequence of stages, each containing steps. When an orchestration runs, it assigns work items to specified users, groups, or queues. Each work item is a flow that the assignee runs.

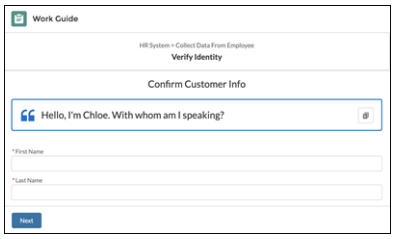
Your org must have Flow Orchestration enabled.

1. Build an orchestration in Flow Builder with at least one step assigned to a credentialed site visitor.
2. Activate the flow.
3. Drag the Flow Orchestration Work Guide component into position on a record page in your site.



4. The Record ID is automatically set. Don't change the field value.

Example: Sample Flow Orchestration Work Guide component.



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To publish an Experience Cloud site:

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- OR
- Be a member of the site AND an experience admin or publisher in that site

To run a flow in an Experience Builder site

- Run Flows

SEE ALSO:

Automate Your Business Processes: Flow Orchestration

Follow Button

The Follow Button component lets users follow topics, articles, and other users.

In the Page Editor, you can configure the follow button component on the User Profile, Article Detail, and Topic Detail pages. This component lets users follow other users, articles, or topics. When a user views their own profile, the button isn't visible because users can't follow themselves.

Each button instance supports its own property values. So, if you have two Follow buttons on a page, the values on each button are unique to that button. You can configure buttons to use the values you defined in your theme so that they all look the same. But each button instance remains unique.

1. Select the **Follow Button** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Followed Record ID`	The system supplies this value. Don't update this field.
`Allow email notifications on topics`	Select to let user's receive email notifications for topic activity.
`Button Text Color`	Set the color of text that's used for the button label. The link icon shows that the current selection comes from colors defined in the theme.
`Button Text Hover Color`	Set the color of text that's used for the button label when a member mouses over the button. In Builder, you can test your hover color in Preview mode.
`Button Background Color`	Set the color to use for the button background when the button is inactive.
`Button Background Hover Color`	Set the color to use for the button background when a member mouses over the button. In Builder, you can test your hover color in Preview mode.
`Button Border Color`	Set the color to use for the border that surrounds the button.
`Button Border Radius`	Move the slider to control the amount of curve to use for the button shape.
`Max Button Width`	Move the slider to control the width of the button. Width percentage is set against the full width of the container the button sits in. So 100% is the full width of the container, rather than the full width of the browser page.
`Button Alignment`	To set the horizontal alignment of a button within its container, select *`Center`*, *`Left`*, or *`Right`*.

Example:

Note: Turn on Feed Tracking for each article type you want members to follow.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Global Search Box

The Global Search Box component lets you expose global search in your Experience Builder site. Let your users search for any object available to them.

Autocomplete search results are based on the most recently used objects and records by the user, the same as global search in your org. The search accounts for partially matching terms and non-adjacent terms.

1. Select the **Global Search Box** component in the page you're configuring.

   In the Partner Central template, for example, this box is on the Home page.

2. In the property editor, configure the properties for the component.

Property	Details
`Placeholder Text for Search Field`	Specify the text that appears in the search box. The default text is Search...
`Objects in Autocomplete Results`	Click **Add** to add searchable Salesforce objects to your site's autocomplete results. To edit an object, click the object name. In the edit window, you can change to another type of object and you can mark the object as **Publicly available**. To select a different object type, click the object name and select from the list. To make results of that object type available to guest users, select **Publicly available**.
`Maximum Autocomplete Results`	Enter the maximum number of autocomplete results displayed to the user during a search. The default is *5*.

Example: Sample Global Search Box component in Partner Central:

With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Enable Search Autocomplete for Guest Users

Global Search for Peer-to-Peer Communities

Global Search for Peer-to-Peer Communities lets your users search for articles, discussions, and any object available to your site members and made searchable. The component is separate and distinct from the overall header, making it easy to customize to a site's needs.

Note: The Global Search for Peer-to-Peer Communities component replaces the Search & Post Publisher component, which was deprecated in Winter '18.

Autocomplete search accounts for partially matching terms and non-adjacent terms.

1. In the page that you're configuring, select the **Global Search for Peer-to-Peer Communities** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Placeholder Text for Search Field`	Enter the text that appears in the search box. The default text is Search...
`Autocomplete Search`	Click to expand the section with autocomplete search properties.
`Use autocomplete in searches`	Select to let users see suggested search results as they type search terms.
`Maximum Autocomplete Results`	Enter the maximum number of suggested results displayed on each tab during a search. The default is 6. An equal number of questions, articles, and objects are displayed in the combined results tab. If a type doesn't have enough results, results of other types are displayed to reach the maximum number. This functionality is available only in the Winter '16 and later versions of Experience Builder templates.
`Limit autocomplete search results to Discussions and Articles`	Select to show only discussions and articles in autocomplete results.
`Objects in Autocomplete Results`	Click **Add** to add searchable Salesforce objects to your site's autocomplete results. To edit an object, click the object name. In the edit window, you can change to another type of object and you can mark the object as **Publicly available**. To select a different object type, click the object name and select from the list. To make results of that object type available to guest users, select **Publicly available**.
`Ask Experience`	Click to expand the section with properties regarding asking the site.
`Show footer during search`	Select to display the footer that gives members an option to ask the site a question.

Property	Details
`Post to Ask the Experience`	Enter the text that invites users to post a question to the site or to customer support. The default is: Don't see what you're looking for?
`Create Your Question Prompt`	Enter the text that users click to ask a question. The default is: Ask a question.
`Create Your Sign-In Prompt`	Enter the text that directs users to a login page before they ask a question. The default is: Sign in to ask a question.
`Allow members to add topics`	Select to show a topic area at the bottom of the question and to allow members to add topics.
`Expand Details section by default`	Show the full question Details section. Users can collapse and expand this section as they choose.

With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Enable Search Autocomplete for Guest Users

Global Search Results

The Global Search Results component displays search results from across the site. The results shown are based on search terms entered in the Search Publisher and can be displayed in one list or in multiple tabs.

1. Select the **Global Search** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Search Term`	The system supplies this search term to search across the site.
`Show the All results tab`	To show search results in one list under All, check the box.
`Allow search results filtering`	To allow search result filtering, check the box.
`Object`	Add or remove tabs to customize which lists search results are displayed in.

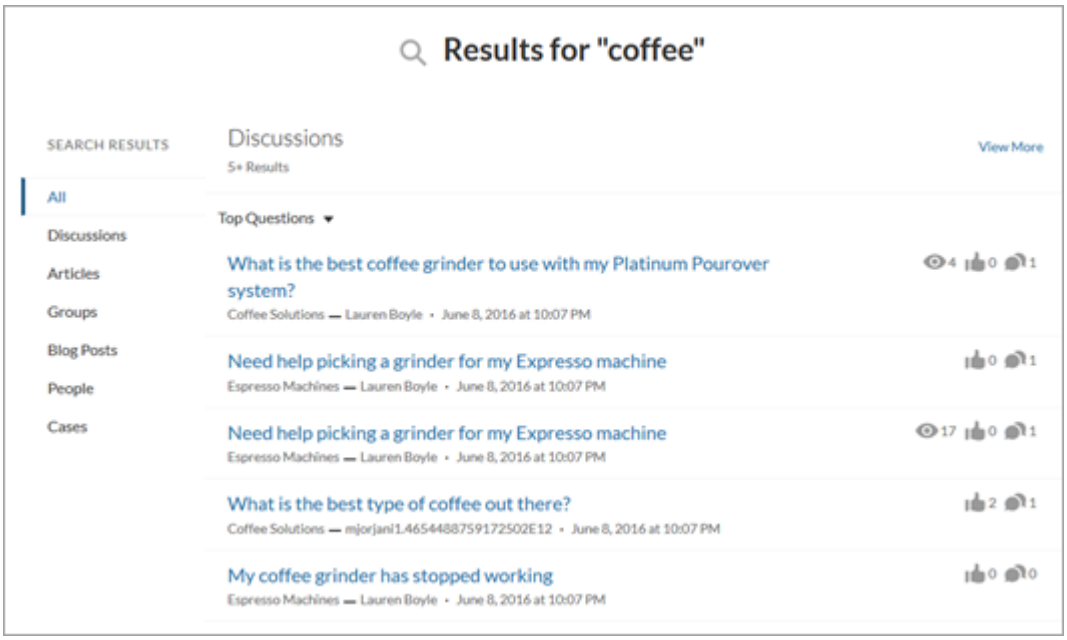
Property	Details
`Publically Available`	To make the object publicly available for all users, including Guest users, check the box.
`Show search results from all feeds, including questions, posts, and comments`	For Discussions objects only. To show expanded search results from all Chatter feeds, check the box. Search results from all feeds use the expanded feed, rather than the compact feed.

Important: To allow your users to find a custom object's records when they search, in Salesforce setup create a custom tab set to *`Default On`* or *`Default Off`*. Creating a custom tab enables the custom object's **Allow Search** setting.

Example:

Note: To see results from all feed types in a site (including questions and posts on records), select the **Show search results from all feeds, including questions, posts, and comments** option on the Discussions tab.

Global Search Results shown in the site:



With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

Note: In a B2B Commerce store, when configuring the types of results to return with a Global Search, don't include Product2 type objects. Global Search doesn't respect the store's user entitlements. So buyers could see products that they're not entitled to see.

The Results Layout component respects user entitlements. You can use Results Layout for products and Global Search for things like cases, articles, and feeds.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

How Search Crowding Affects Search Results

Group

The Group component displays all the content in a group using a single composite component. It includes the group banner, which includes the member and owner actions, the group feed, description, and related lists (group members and files).

When you add groups to your site navigation menu, clicking the Groups item directs site members to a list of groups. Clicking a group in the group list loads the Group Detail page, which uses this component by default.

Note:

- Add the Add Member action to the group publisher for users to access it from the banner.
- For optimal display, choose a wide column width when using this component on a custom page.

1. Select the **Group** component on the page you're configuring. By default, this component is on the Group Detail page.

   Note: You must have at least one group in your site to view the Group Detail page and modify its components.

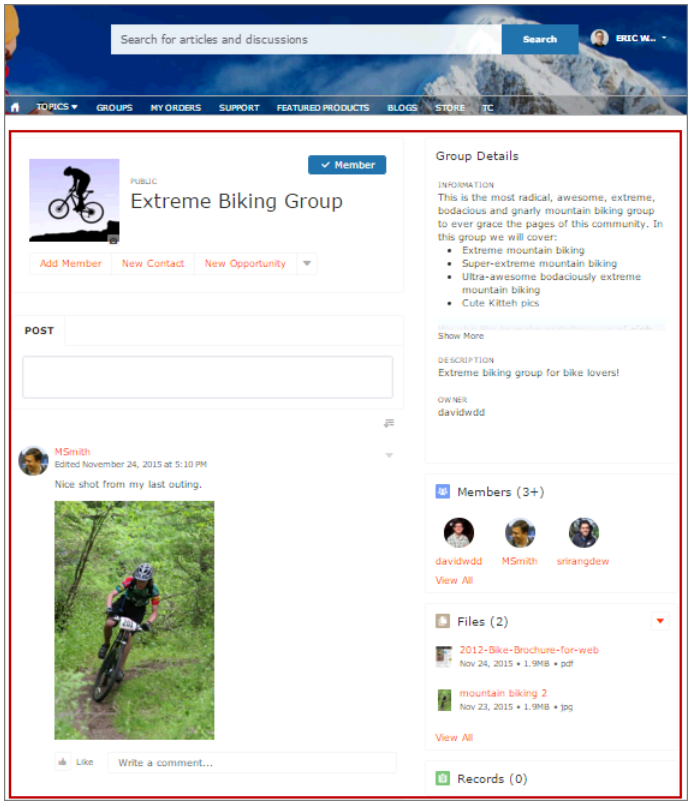
2. In the property editor, configure the properties for the component.

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.
`Feed Tab Label`	The label used for the group feed tab on mobile devices. The default text is `Feed`. The label you specify here doesn't affect labels on desktop browsers.
`Details Tab Label`	The label used for the group details tab on mobile devices. The default text is `Details`. The label you specify here doesn't affect labels on desktop browsers.
`Related Tab Label`	The label used for the related lists tab on mobile devices. The default text is `Related`. The label you specify here doesn't affect labels on desktop browsers.

Example:

Warning: Avoid spamming new group members in a community, especially if you are adding group members en masse. Deselect the following org-wide Chatter email notifications: **Allow Emails** and **Allow Posts via Email**. Access these settings by searching *`Email Settings`* in the Quick Find search box in Salesforce Setup.

Sample Group component:



Note: The Group component is optimized to be responsive across all devices. If you want more control over the placement of group content, you can use separate components to create a custom layout. Use the Group Banner, Group Detail, Group Related List, Feed Publisher, and the Feed or Feed Compact components to create a custom group page. However, creating a custom group page does not guarantee optimal display and responsiveness across desktop and mobile devices.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Group Banner

Use the Group Banner component on custom group detail pages for your site. This component displays the group name, the group photo, the Join Group and Leave Group buttons, and other action buttons for group owners, managers, and members.

Use the Group Banner component with the Group Detail, Group Related List, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness across all desktop and mobile devices. We recommend using the Group component instead, which is a single composite component that displays all of this content.

Note:

- Add the Add Member action to the group publisher for users to access it from the banner.
- For optimal display, choose a wide column width when using this component.

1. Select the **Group Banner** component on the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.

Example: Sample Group Banner component:

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Group Detail

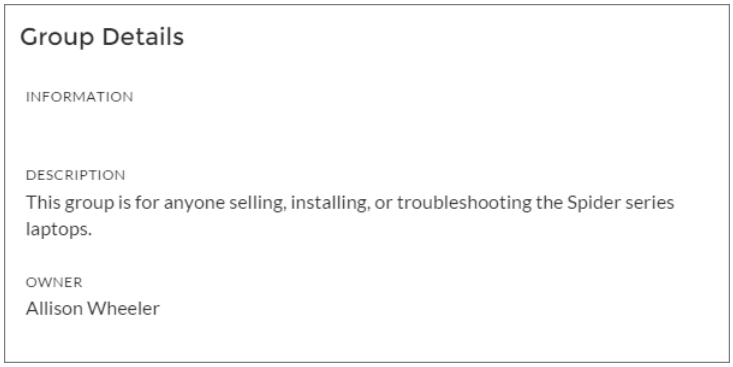
Use the Group Detail component on custom group detail pages for your site. This component displays the content from the group description and information fields along with the name of the group owner.

Use the Group Detail component with the Group Banner, Group Related List, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness across all desktop and mobile devices. We recommend using the Group component instead, which is a single composite component that displays all of this content.

1. Select the **Group Detail** component on the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.
Header label	The label for the group details section. Affects both the desktop and mobile view.

Example: Sample Group Detail component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Group Related List

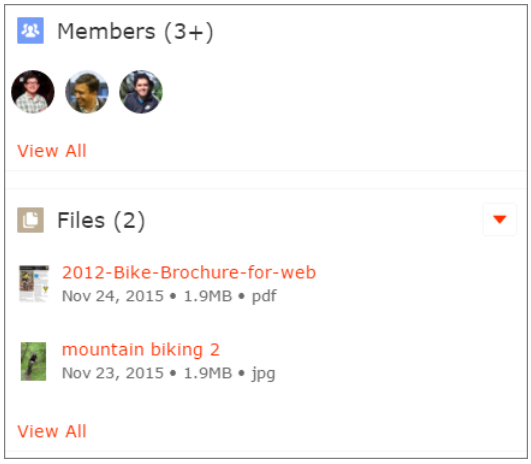
Use the Group Related List component on custom group detail pages for your site. This component displays the group files, members, and records.

Use the Group Related List component with the Group Banner, Group Detail, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness across all desktop and mobile devices. We recommend using the Group component instead, which is a single composite component that displays all of this content.

1. Select the **Group Related List** component on the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.

Example: Sample Group Related List component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Headline

The Headline component gives you customizable headline text and text banner with inline links to pages that show discussions, topics, and articles. It also displays an icon to the left of the banner that identifies the content as an article or a discussion when either is selected.

1. Select the **Headline** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

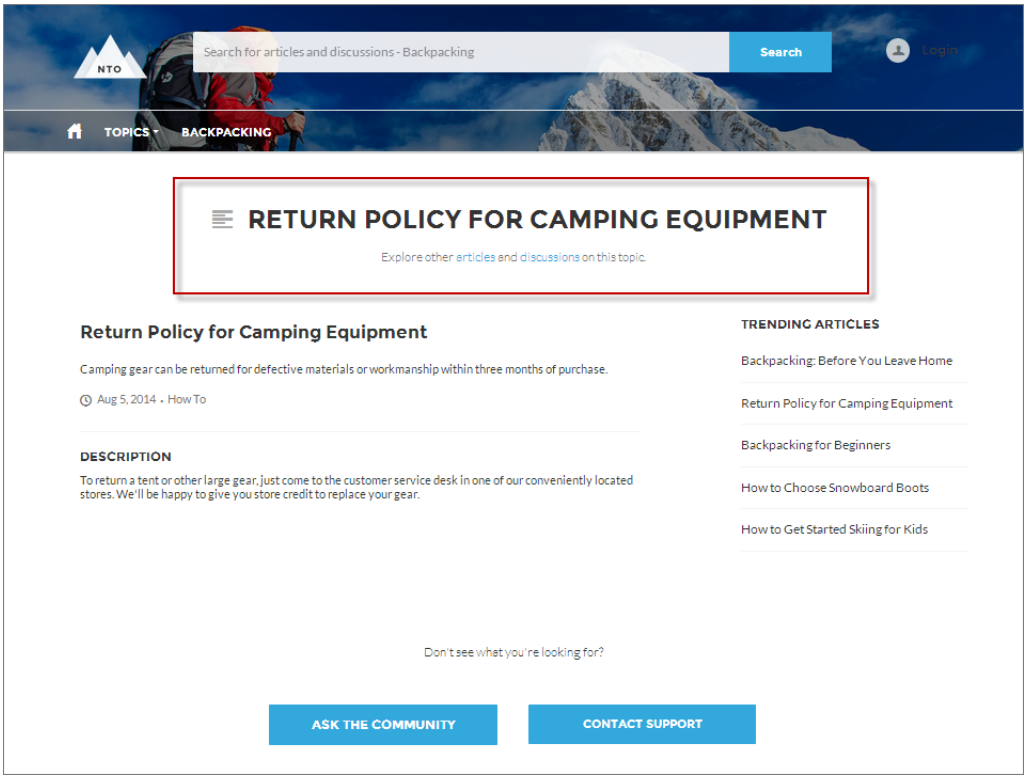
Property	Details
`Title`	Enter the static text for the page's headline. The default text for the page is `Welcome!`.
`Banner Text`	Enter the static text that appears on the home page. The default text is `A place where you can easily find solutions and ask questions.`
`Page Type`	Enter the type of content that the page displays in this page. Type either *`article`*, *`topic`*, or *`discussion`* to retrieve the title of the page and display an icon identifying the type of page the user is viewing. When `Page Type` is set to `article`, the Headline component is hidden in the mobile view. If you want to show the Headline component, you need custom CSS.
`Unique Name or ID`	The system retrieves the ID from the URL of the question or article when it's selected.
`Banner Text with Articles and Discussions`	Enter the static text and link text that lets users select a page that shows articles or discussions. This text and links in this field appear on the page when Salesforce Knowledge is enabled and set up in your organization. You can translate and change the value of each component, but not the position of the component. `Explore other <a href="javascript:void(0)" class="headlineArticles">articles</a> and <a`

Property	Details
	`href="javascript:void(0)" class="headlineDiscussions">discussions</a> on this topic`
`Banner Text with Discussions`	Enter the static text and link text that lets users select a page that shows discussions only. This text and link in this field appear on the page when Salesforce Knowledge isn't enabled in your organization. You can translate and change the value of each component, but not the position of the component. `Explore other <a href="javascript:void(0)" class="headlineDiscussions">discussions</a> on this topic`
`Show Subtopics`	Below the headline, displays links to topics that are children of the current topic. (On mobile devices, these links appear in a Subtopics menu.) Only navigational topics support parent-child relationships.

If you have set up navigational subtopics, change the following properties in the property editor to populate topic and subtopics dynamically on the topic detail page:

Property	Details
`Title`	Enter *`{!topicName}`* to retrieve and display the topic name on the topic detail page.
`Page Type`	Enter *`topic`* as the page type.
`Show Subtopics`	Select this option to display subtopics.

Example: Sample Headline component:



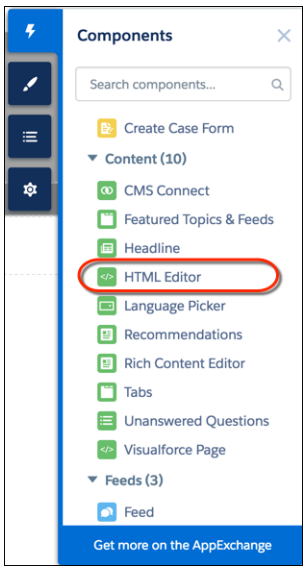
SEE ALSO:

Which Components Can I Use with Each Aura Template?

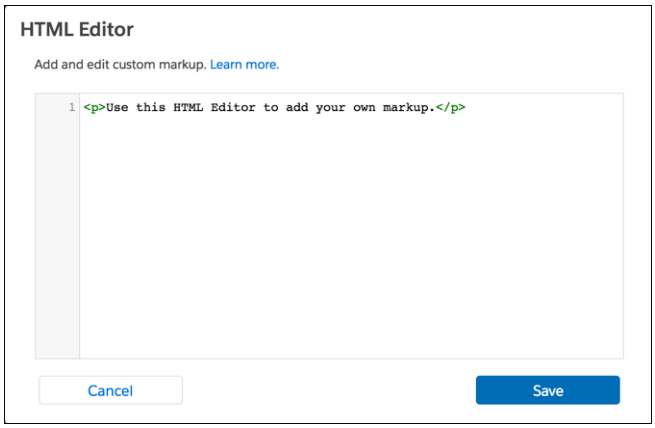
HTML Editor

The HTML Editor component lets you create and edit custom content in HTML.

1. In Experience Builder, drag the HTML Editor component from the Components panel onto the page.



2. Add and format HTML content.



EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

The HTML Editor component supports the following HTML tags and attributes. Any exceptions are flagged in your markup.

Tags: a, abbr, acronym, address, area, b, basefont, bdo, big, blockquote, br, button, caption, center, cite, code, col, colgroup, dd, del, dfn, dir, div, dl, dt, em, fieldset, font, form, h1, h2, h3, h4, h5, h6, hr, i, iframe, img, input, ins, kbd, label, legend, li, map, menu, ol, optgroup, option, p, pre, q, s, samp, select, small, span, strike, strong, sub, sup, table, tbody, td, textarea, tfoot, th, thead, tr, tt, u, ul, var, xmp

Attributes: abbr, accept, accept,-charset, accesskey, action, align, alink, allowfullscreen, alt, autocomplete, axis, background, bgcolor, border, cellpadding, cellspacing, char, charoff, charset, checked, cite, class, classid, clear, code, codebase, codetype, color, cols, colspan, compact, content, coords, data, datetime, declare, default, defer, dir, disabled, download, enctype, face, for, frameborder, frameborder, headers, height, href, hreflang, hspace, http-equiv, id, ismap, label, lang, language, link, list, loop, longdesc, low, marginheight,

marginwidth, max, maxlength, media, method, min, mozallowfullscreen, multiple, name, nohref, noresize, noshade, novalidate, nowrap, open, optimum, pattern, placeholder, poster, preload, pubdate, radiogroup, readonly, rel, required, rev, reversed, rows, rowspan, rules, scheme, scope, scrolling, selected, shape, size, span, spellcheck, src, srclang, standby, start, step, style, summary, tabindex, target, text, title, type, usemap, valign, value, valuetype, version, vlink, vspace, webkitAllowFullScreen, width, xmlns, data-*

SEE ALSO:

Rich Content Editor

Knowledgeable People

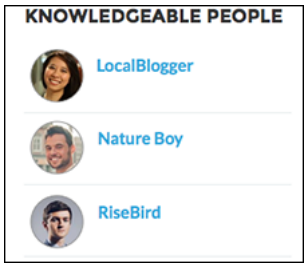
Highlight topic experts so the site can direct questions straight to them. The Knowledgeable People component displays up to five experts, chosen based on factors such as best answers, mentions, or likes on questions and posts.

In the Page Editor, you can configure the Knowledgeable People component on Topic View pages.

1. Select the **Knowledgeable People** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Title`	Enter a title for the component. The default text is `Knowledgeable People`.
`Topic ID`	The default entry, `{!topicId}`, displays unique knowledgeable users for each topic. To instead display knowledgeable users based on a specific topic, enter the topic ID.

Example:



For sites created in Spring '15 or earlier, complete these steps to add the Knowledgeable People component:

- From the site, click in the global header.
- Click **Administration** > **Preferences**, and select **Enable knowledgeable people on topics**.
- Click **Administration** > **Pages**, and go to Site.com Studio.
- In the Site Pages section, double-click the **main** page.
- In the Views tab at left, double-click **Customer Service Topic View**.
- Click the Page Elements tab , and search for the Knowledgeable People component.

- Right-click the component, and place it in the `div.cSecondaryContent` section.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Language Selector

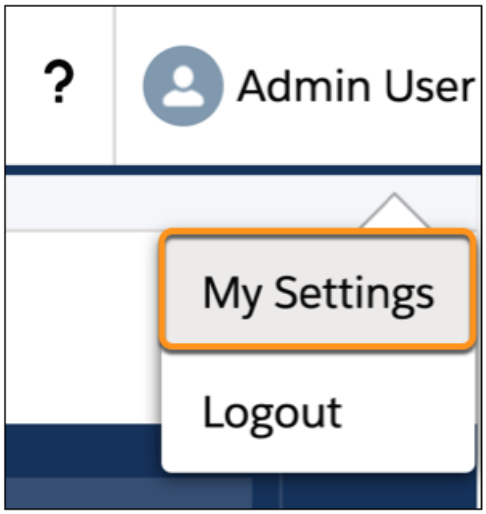
Add the Language Selector component to multilingual sites so guest users can select their preferred language on public site pages.

Only guest users on public pages can see the Language Selector component. The site initially appears in the default site language until the user selects their preferred language. The page then reloads in the selected language if a translation is available.

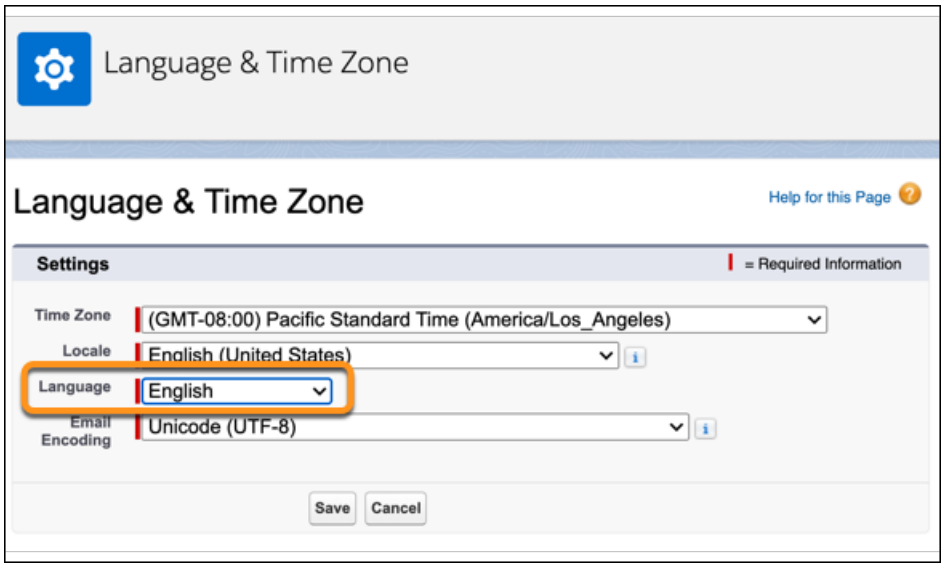
For authenticated users on private pages, the site typically appears in their profile language automatically. But when users have credentials and they're not yet logged in, they're treated like a guest user. So if the user selects a language on a public page that contains a Language Selector component—let's say the Home page—that language choice persists after the user logs in. The exception to this rule is the Login page. It's a public page, but even if it contains the Language Selector component, the language selection that a user makes doesn't persist after login.

To give authenticated users access to a language selector, create a custom component, and add it to a private page. When a private page contains a custom language selector, the user's selection overrides their profile language.

1. To change the profile language preference as a logged in user, open the Experience Workspace for the site that you want to view. From the User Profile, click **My Settings**.



2. From the My Personal Information menu, click **Language & Time Zone**, and then select a profile language. Then when you access a site as a logged in user, the site URL displays your selected language.



3. To view the updated profile language, log out, and then log back in to your site.

The Language Selector component isn't included on any page by default. Add it manually to the pages in your site. You can add the Language Selector component to any section of any page, but we recommend placing it where it's easy to spot. Also, consider adding the component to a theme region such as the Template Header Top region. Items that are added to theme regions are common across all pages, so it's not necessary to add the component to every page.

Customized components and Salesforce Knowledge articles use the translations that the site admin adds through Translation Workbench.

1. To add the Language Selector component to your page, drag it onto the page that you're configuring.
2. In the property editor, configure the properties for the component:

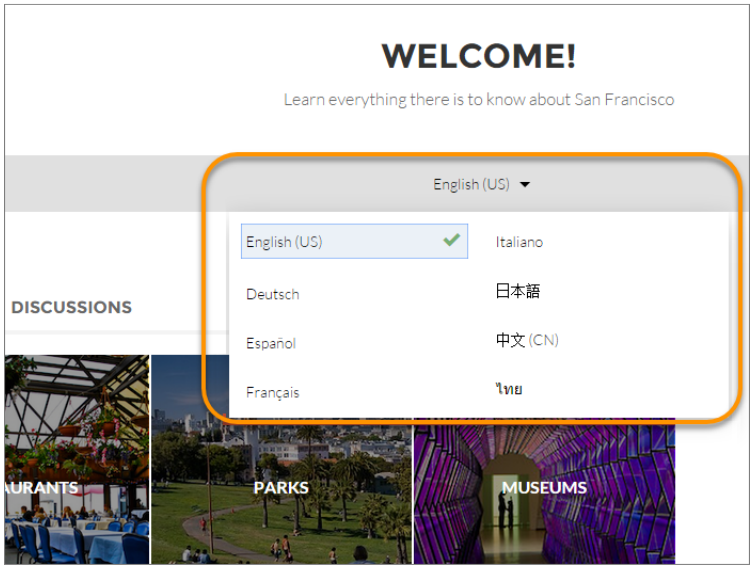
Property	Details
`Label`	Identifies this component on a page. This text helps increase accessibility. Default text is *`Preferred Language`*.
`Button Label Alignment`	Specifies how the language selector's label is aligned on the button. Select *`Left`*, *`Center`*, or *`Right`*. The default value is `Center`.

Note:

- For information about setting up languages in a site, see Multilingual Communities Overview. If no languages apart from the default language are set in the site, the language selector shows the default language without a dropdown option.
- To see the list of languages that guest users see, make sure that you're on a page that contains the component. Then click the selector's dropdown icon.
- When a guest user accesses a site in a language that's not included in the Language Selector component, the site redirects to the set default language in Builder.
- A site user can add one of the site's supported language query parameters to the browser address bar and override the Experience Site's default language. This action also overrides the site user's default language on the current and subsequent pages the user visits.
- Ensure that all translated content and Salesforce Knowledge articles have a version in the site's default language.

- Before Summer '18, the Language Selector component was named Language Picker.

Example: Sample Language Selector component with dropdown language list visible:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Best Practices and Considerations for Multilingual Sites

Lead Inbox

Use the Lead Inbox component to share a common pool of leads with partners in your site.

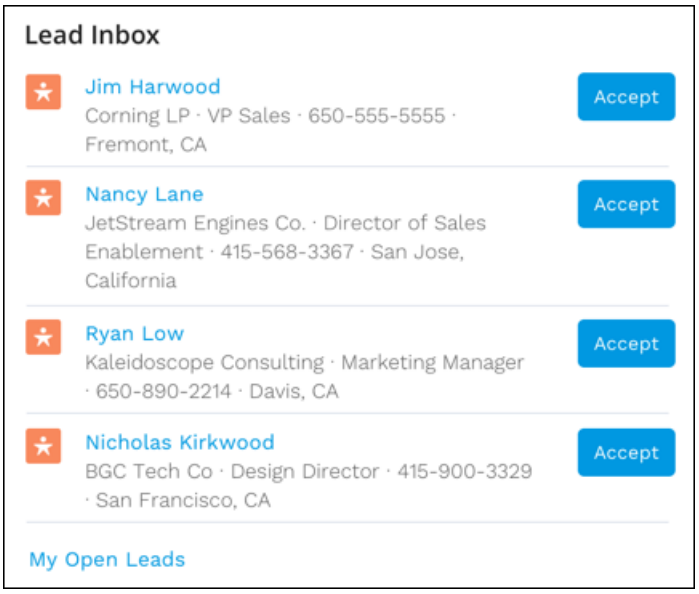
The lead inbox uses a queue and the list view associated with a queue to pass leads to partners. Partners included in the visibility settings for the queue and list view can see and accept leads from the Lead Inbox. Accepting a lead makes the user the owner of the lead.

1. Click the Lead Inbox component on the page you're configuring. By default, the Lead Inbox component lives on the Home page of the Partner Central template.
2. In the property editor, configure the properties for the component:

Property	Details
`Title`	Specify a title for the lead inbox. The default title is `Lead Inbox`.
`Number of Leads`	Specify the number of leads to display in the lead inbox. The default value is `5`.
`Sort Order`	Select a sort order for the list of leads. You can sort by the date on which the lead was created, ascending or descending.
`Link to the leads list view`	Select to show a link to a lead list view on the lead inbox.

Property	Details
`Linked List View`	If you selected the previous option, specify the leads list view you want to show a link for. By default, the first leads list view in the org is selected.

Example: Sample Lead Inbox Component:



SEE ALSO:

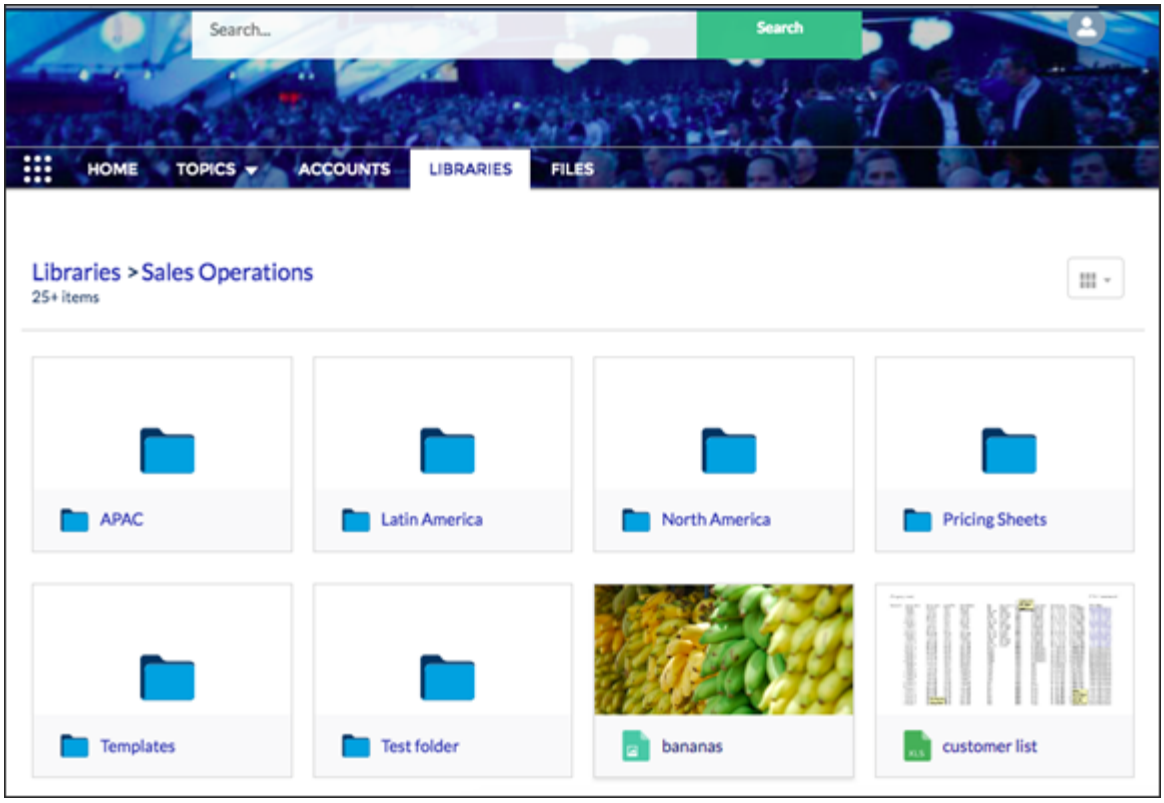
Which Components Can I Use with Each Aura Template?

Libraries

Give access to your libraries to site members using the Libraries component. Use this component in Customer Service, Build Your Own (Aura), Partner Central, and Customer Account Portal templates.

Site members view and open libraries they have access to, either in a list view or a tile view. Drill down inside libraries and folders, and the files display as thumbnails, making it easy to spot a colorful spreadsheet or perfect photo. The Libraries component doesn't have any properties to edit, and it can be used on any page that isn't already using the Files List component.

Example: Sample Libraries component:



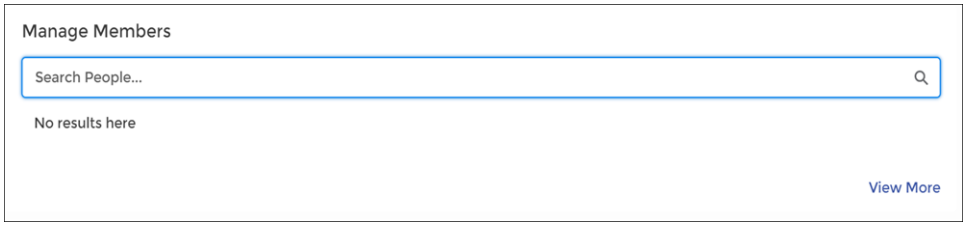
Manage Members Section

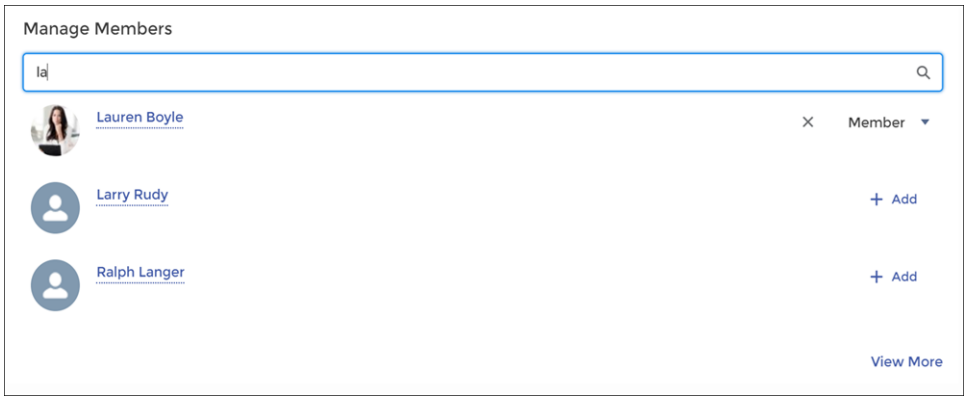
The Manage Members Section component allows you to search for and add members to your group from an Experience Cloud site. Search results update dynamically as you type.

1. Select the **Manage Members Section** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Group ID`	Enter a group ID. To find a specific group ID, navigate to the group home page and copy the ID from the URL. The ID is a string of numbers and letters. Group URL format example: `https://MyDomainName.my.site.com/siteName/s/group/0F7A0000000DZXiNQO/groupName` For this URL, the group ID is `0F7A0000000DZXiNQO`.
`Header Label`	Enter header text for your component. The default is `Manage Members`.

Example: Sample Manage Members Section component:





Member Profile and Settings

The Member Profile component allows site members to easily edit their account information. And the best part is that all a member's important information is in one place—profile information and various settings in one handy component. What does that mean for you and your business? Fewer phone calls into your call centers for simple updates.

The Member Profile component uses a default image in the header. Using the component's properties in Experience Builder, you can choose to not show the default image.

The fields that you see in the Member Profile component are set in Salesforce setup **Setup** > **Users** > **Page Layouts** > **User Profile Page Layout**.

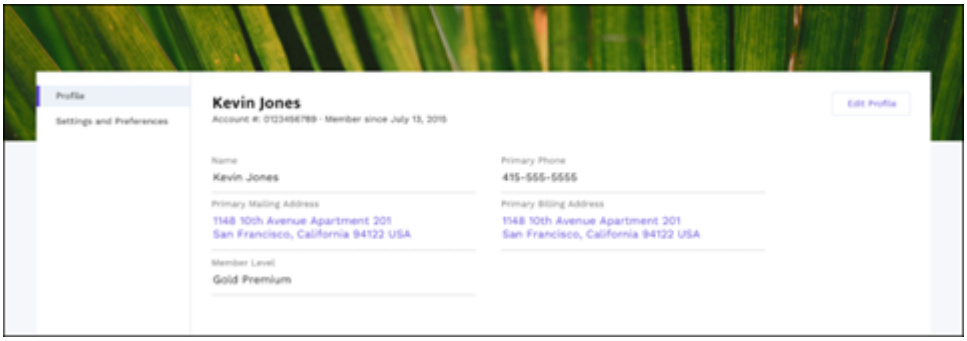
Use the Member Profile component on the User Profile page of sites made using the Customer Account Portal.

1. Select the **Member Profile** component in the page you're configuring.
2. To view the component properties, select the Properties pane:

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Show banner image at top`	Shows a banner image at the top of the Member Profile component. If unselected, no banner image is seen.
`Edit Banner Image`	Choose a banner image for displaying at the top of the Member Profile component.
`Show Settings tab`	Show the Settings tab on the component.
`Profile Tab Label`	Enter a label for the Profile tab. The default text is *`Profile`*.

Property	Details
`Settings Tab Label`	Enter a label for the Settings tab. The default text is *`Settings & Preferences`*.

Example: Sample Member Profile component.



Membership

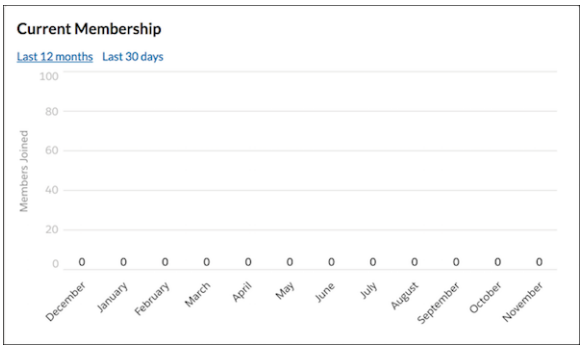
The Membership component displays the number of new group members, either in the past 30 days or the past 12 months.

The Membership component is visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

1. Select the **Membership** component in the page that you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.

Example:



Message Notification

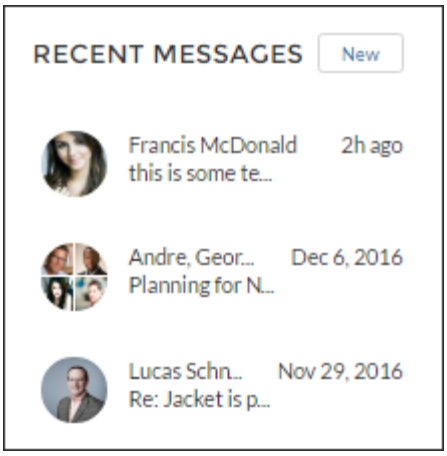
Add the Message Notification component to your site pages to let users view their recent messages from outside the Messages list view. The Message Notification component shows up to three recent messages and allows users to send new messages.

Add the Message Notification component to the site Home page and configure it in the Page Editor.

1. Select the **Message Notification** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Header Label`	Enter a title for the component. The default text is *`Recent Messages`*.

Example: Sample Message Notification component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Navigation Menu

The Navigation Menu component extends your site's navigation beyond navigational topics. Navigation menu items can include Salesforce objects, topics, pages in your site, URLs to external sites, and menu labels. Menu labels are parent headings under which you can nest other menu items. You can also enable the App Launcher to make it easy for members to switch between their sites and their Salesforce org.

When setting up the navigation menu, consider the following:

- You can add up to 20 navigation menu items. Menu items that don't fit on the first line of the navigation menu appear in a More overflow menu item.
- If you want to map a navigational topic to a menu item, you must first set it up in Experience Management.
- The Help Center and LWR templates (Build Your Own and Microsites) don't include generic record pages. So if you create an object or global action type menu item that links to a Salesforce object, make sure that you also create the corresponding object pages. If you don't create the associated object pages, end users can't see anything when they click the menu item.

To create or modify navigation menu items:

1. Select the **Navigation Menu** component in the page you're configuring.
2. To display the App Launcher in existing sites, clear the checkbox for **Hide App Launcher in header**.
3. To show an icon for Home instead of text, select **Replace Home text with icon**.

4. In the property editor, click **Navigation Menu**.

   Note: In the menu editor overlay, you can edit or delete existing menu items, or add new ones.

5. To add a menu item:

   a. Click **Add Menu Item**.

   b. Enter the name you want to use in the navigation menu for this item.

   c. Select the type of item you're navigating to.

      Options include:

      - Event—Events like log in, log out, and account switcher.
      - External URL—Links to a URL outside of your site. For example, `https://salesforce.com`.
      - Global Action—Links to a global action. For example, `New Case`.
      - Menu Label—Adds a parent heading for your navigation menu. Nest items underneath the menu label.
      - Navigational Topic—A dropdown with links to the navigational topics in your site. Navigational topics are set up in Experience Management.
      - Site Page—Links to a page inside your site using a relative URL. For example, `/contactsupport`.
      - Salesforce Object—Available objects include accounts, cases, campaigns, contracts, contacts, dashboards, groups, leads, opportunities, orders, price books, products, quotes, reports, tasks, work orders, and any custom objects.

        Tip: Select this option to create a list view page for the selected object. This option is the easiest way to expose Salesforce record data in your site with minimum configuration.

      - System Link—Links to Experience Builder, Workspaces, and setup.

   d. Complete the fields based on the type you selected.

      - If you selected Salesforce Object, select the default list view to show.
      - If you selected Site Page, use the dropdown to select the site page you want to link to. The URL field automatically populates the relative URL for the page based on your selection.
      - To add the Messages page to your navigation menu, replace the `:recordId` parameter with `Home`.
      - If you selected External URL, enter the fully qualified URL. To keep navigation within your site, select the `Open link in the same tab` checkbox.
      - Select **Publicly Available** if you want the navigation menu item to appear for guest users who aren't members of the site.

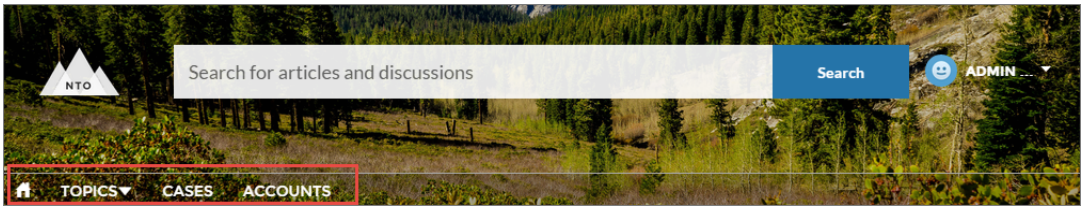
6. To move an item, click and drag the item to where you want it to appear in the menu. Nest other menu items underneath a menu label by dragging them to the right under the menu label.

7. To delete a menu item, hover over or click the item and click .

8. To save your changes, click **Save Menu**.

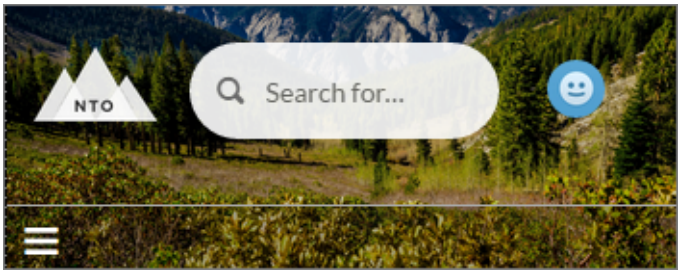
   Note: For these changes to be visible to users, your site must be activated in Experience Workspaces and recent changes must be published.

Example: Sample Navigation Menu component:



On a mobile device, your site navigation menu collapses to better fit your screen.

Sample Navigation Menu component on a mobile device:



If your site hosts users who speak different languages, you can translate your navigation menu using the Translation Workbench. However, the fallback language setting doesn't apply to the navigation menu.

For information on using the Translation Workbench, see Translation Workbench in Salesforce Help. Make sure to publish your site after translating so the translations appear to your users.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Assign an Audience to a Component Variation

New Message Button

The New Message Button lets site members start a direct message conversation from wherever you place the button.

Add the New Message Button component to a site page and configure it in the Page Editor.

1. Select the **New Message Button** component.
2. In the property editor, configure the properties for the component.

Property	Details
`User ID`	The ID of the recipient. The system attempts to detect and populate this value based on the page where the New Message Button is placed.
`Label`	Enter a title for the component. The default text is *`Send Message`*.

Example: Sample New Message Button component:

SEE ALSO:

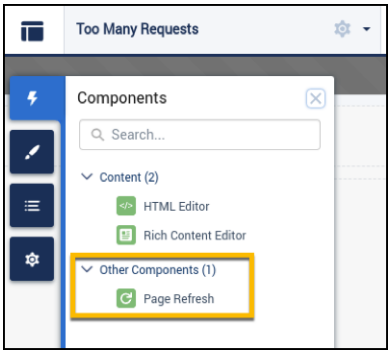
Which Components Can I Use with Each Aura Template?

Page Refresh

The Page Refresh component automatically refreshes the page for your customers.

The Page Refresh component is built into the body of the Too Many Requests page, so there's no need to manually add it to the page.

Note: The Too Many Requests page uses the same theme layout header and theme layout footer as the Service Not Available page. So if you move the Page Refresh component to the header or footer on the Too Many Requests page, the component is also added to the Service Not Available page.



Path (Experience Builder Site Component)

On object detail pages in Experience Builder sites, use the Path component to indicate and mark the path through a business process.

You can add the Path component to Experience Builder site object detail pages for the following objects:

- Account
- Asset
- Campaign
- Case
- Contract
- Lead
- Opportunity
- Order
- Partner Fund Allocations

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

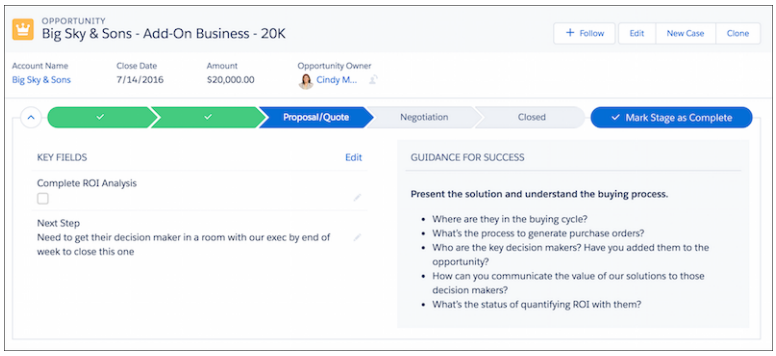
- Partner Fund Claims
- Partner Fund Requests
- Partner Marketing Budgets
- Product Request
- Product Request Line Item
- Product Service Campaign
- Product Service Campaign Item
- Service Appointment
- Service Contract
- Work Order
- Work Order Line Item
- Custom objects

For an overview of setting up Path in Salesforce, see Guide Users with Path. The Path component is intended for a wide-column layout. Add it to columns that are at least 50% wide, though full columns are best.

Note: To make paths available on mobile devices, configure a custom path for mobile. In the mobile app, Path supports leads and opportunities only.

1. Set up a sales process in your org. If you're creating a path for service appointments, work orders, or work order line items, you can skip this step.
2. Set up the path in the Setup menu.
   a. From Setup, enter `Path` in the Quick Find box, then select **Path Settings**.
   b. Click **Enable**, and then click **New Path** to create a path.
3. Create object pages in Experience Builder (for any object that supports Path).
4. Drag the **Path** component onto the detail page that you're configuring.

Example: Sample Path component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Paused Flows

Add the Paused Flows component to let your Experience Builder site members view all the paused flows they own, resume them at a more convenient time without losing their work, or delete them. When setting up a flow in Salesforce Setup, you must choose pause points in order to allow site users to pause and resume flows.

To pause a flow, your site members must have the **Run Flows** permission.

For example, your financial company has a flow to help folks apply for a credit card. Your customer gets stuck on one of the steps (what *was* my address 12 years ago?). Rather than lose the previous screens of information, the customer can press **Pause** to find the needed information. Or, your customer pauses a step and needs help with continuing with the forms. The customer can contact your company, and a service agent can continue the flow for them.

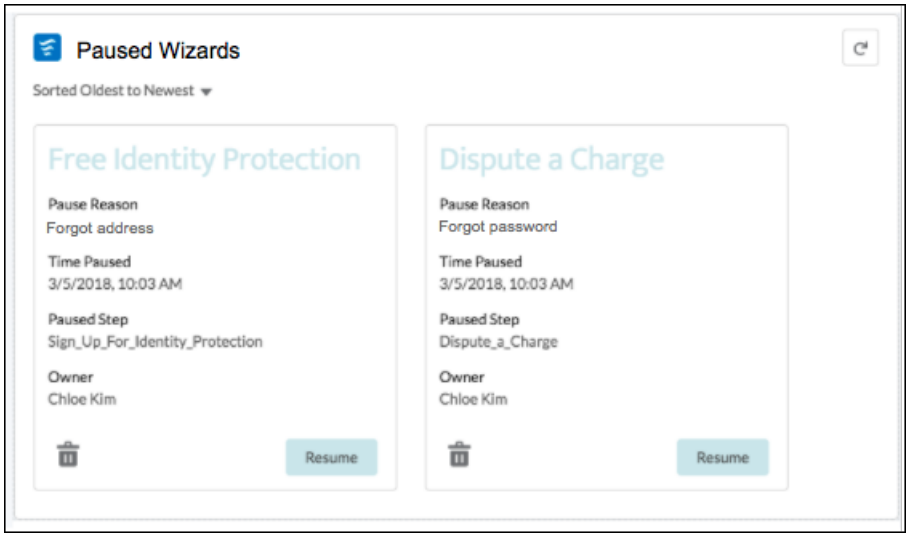
In **Setup** > **Process Automation Settings**, select **Let users pause flows**. When you set up a pause point in your flows, you can use the Paused Flows component in Experience Builder.

Note: While we call them flows here at Salesforce, your company could call them processes, forms, steps, or wizards. Use a naming convention that your customers understand for the title field.

1. Select the **Paused Flows** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Title`	Add a title that is easily understood by your site members. Default text is **Paused Flows**.
`Show number of flows in title`	Select to show the number of paused flows in the title, in parentheses.
`Maximum Paused Flows Displayed`	The maximum number of flows shown in the component is 10.
`Show pause reason`	Shows the reason the flow was paused.
`Show pause time`	Displays the time the flow was paused.
`Show pause step`	Displays the name of the step that the flow was paused.
`Show owner`	Displays the flow's owner.
`Delete button`	Displays a delete button to delete the flow.
`Resume Button Label`	The button text to resume a flow. Default text is **Resume**.
`Button Alignment`	Choose the button alignment. Default is **Center**.

Example: Sample Paused Flows component:



Profile Header

The Profile Header component displays a user's name (or nickname) and profile picture. It also displays a dropdown that lets users navigate to their profile, open a case, access their locale and email notification settings, or log out of the site. External users can also access and manage their account. If the user isn't logged in, a Login button appears in the header.

Note: The User Profile Menu component replaces the Profile Header component in sites based on Winter '18 and later versions of Experience Builder templates.

Users can't customize the profile photo functionality in the profile header—they need to edit all profile information from the profile details page.

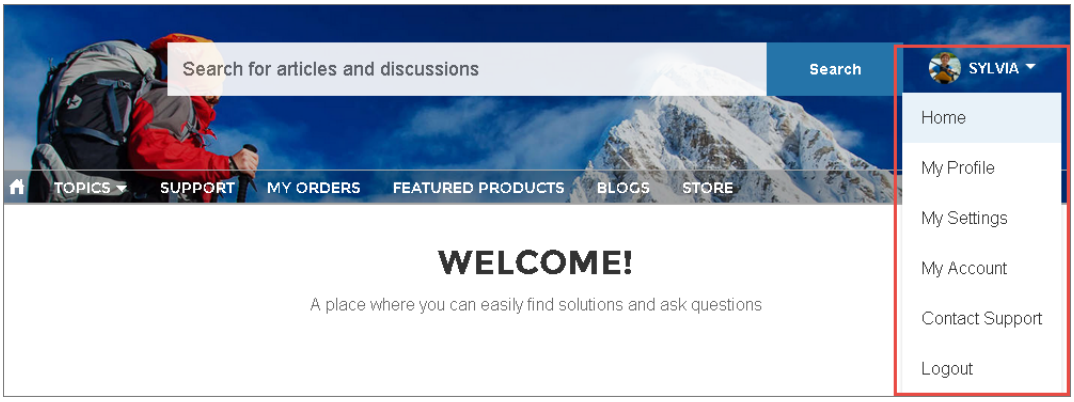
Note: If nickname display is enabled in the site, this component shows the nickname instead of the user's name. The user's reputation level displays only if reputation is enabled in the site.

1. Select the **Profile Header** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Case Filter Name or ID`	The name or ID of the list view that displays the user's cases. This value is used throughout the site to display the user's list of cases. By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Include Contact Support`	Select this checkbox to include the option to contact an agent from the profile.
`Home Label`	Enter the text you want to show for the link to the site home page from the user navigation menu. The default text is *`Home`*.

Property	Details
`View Profile Label`	Enter the text you want to show for the link to the profile detail page. The default text is *`View Profile`*.
`Contact Support Label`	Enter the text you want to show for the link to the page where the user can open a case. The default text is *`Contact Support`*.
`Login Label`	Enter the text you want to show for the link to log in to the site. The default text is *`Login`*.
`Logout Label`	Enter the text you want to show for the link to log out from the site. The default text is *`Log Out`*.
`Experience Management`	Enter the text you want to show for the link to the Experience Management page. The default text is . This link only appears for users with permissions to manage the site.
`Setup Label`	Enter the text you want to show for the link to the setup page for sites. The default text is *`Site Setup`*. This link is shown to users with permissions to create or modify the site's administration settings.
`User Settings` (Customer Service template only)	Enter the text you want to show for the link to access an authenticated user's personal settings for the site. The default text is *`My Settings`*.
`Show User Settings in Menu` (Customer Service template only)	Select this checkbox to show user settings in the profile dropdown list.
`My Account Label` (Customer Service template only)	Enter the text you want to show for the link that external users click to view their account record. The Default text is *`My Account`*. This feature is available in the Spring '16 version of the Customer Service template and later. External site members who access the My Account link see their account details based on the configuration of the Record Detail page.

Example: Sample Profile Header component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Recognition Badges

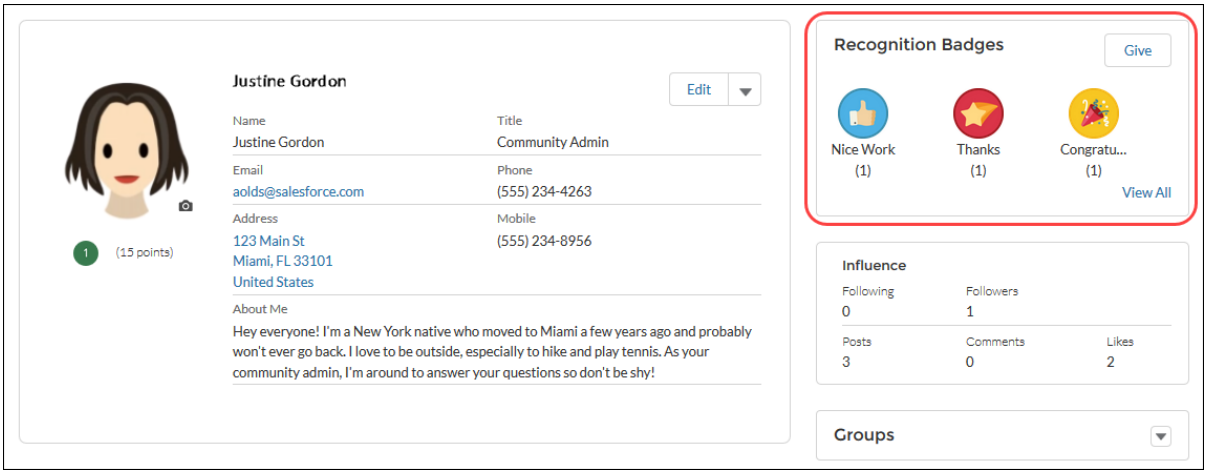
The Recognition Badges component displays up to three of the most recent badges a user has earned. It also shows the Give Badge button, and a link to view all badges the user has earned.

From the User Profile page in Experience Builder,

1. Add the Recognition Badges component to the User Profile page.
2. In the property editor, configure the properties for the component.

Property	Details
`Id`	The system supplies this value. Don't update this field.
`Title`	Enter a title for the component. The default text is `Recognition Badges`.
`Button Text`	Enter a name for the button that users click to give badges. The default text is `Give`. The Give button is only available if the **Give Recognition Badges in Lightning Communities** permission is turned on.

Example: Sample Recognition Badges component



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Recommendations

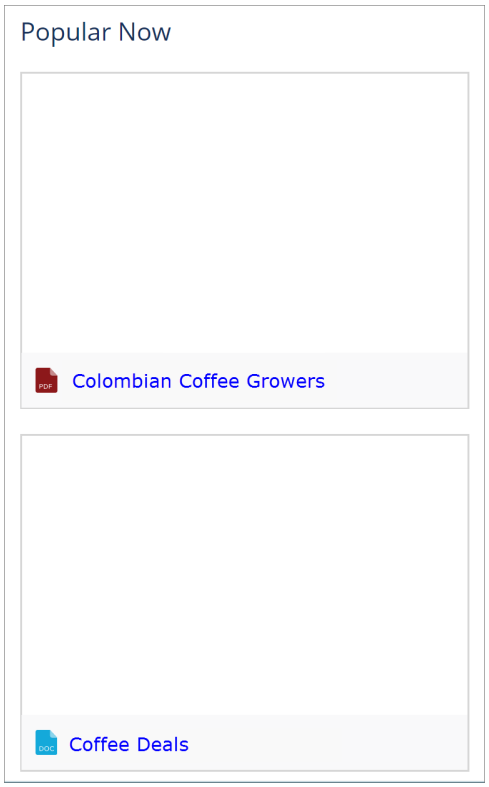
The Recommendations component displays the popular files for your site. Popularity is determined by the number of people who have recently viewed a file and whether the file includes text and is in a library.

The Recommendations component appears by default on the Resources page when a recommendation is available.

1. Select the **Recommendations** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Title`	Enter a title for the component. The default text is *`Popular Now`*.

Example: Sample Recommendations component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Recommendations Carousel

The Recommendations Carousel component displays the custom recommendations and system-generated topic recommendations for your Experience Cloud site.

Note:

- For a more updated content targeting experience, we suggest using the CMS Collection component with personalization audiences.
- Before Winter '18, this component was named Recommendations.

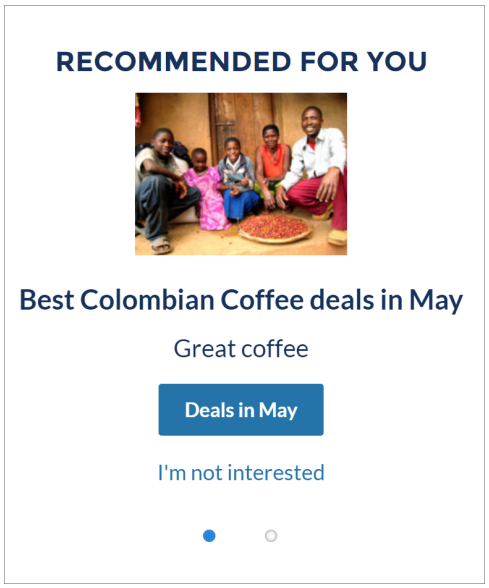
The Recommendations Carousel component appears on the page when a recommendation is available.

1. Select the **Recommendations Carousel** component.
2. In the property editor, configure the properties for the component:

Property	Details
`Title`	Enter a title for the component. The default text is *`Recommended`*.
`Recommendation Channel`	Choose the recommendation channel. The default is *`Default Channel`*. To display recommendations that you created in a custom channel, choose that channel. Use these channel values; you can't rename or create other channels.

So that users don't see the same recommendations all the time, Salesforce periodically removes and brings back custom recommendations that haven't been accepted or dismissed.

Example: Sample Recommendations Carousel component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Customize Recommendations in Experience Cloud Sites

Record Banner

The Record Banner component shows the record name, key record highlights, and action buttons that allow users to edit or delete the record.

Before Spring '16, this component was named Record Headline. The Customer Service template supports a record detail page that you can use out of the box with no configuration. All objects in your site without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where a user lands on a case detail page. The page uses a preassigned case detail layout. The user clicks a contact in the related records. If you haven't created a custom record detail page for contacts, the contact information is displayed using the generic Record Detail page. Under the hood, the Record Detail page uses the Record Banner component along with the Record Information Tabs component to display record data.

- You can use the Record Banner component on custom record detail pages that you create. We recommend using it with the Record Information Tabs component.
- You can modify what fields display in the Record Banner component by customizing the Highlights Panel layout in the object's compact page layout.
- Members with the necessary permissions can use the Edit, Delete, and Follow buttons to modify, delete, or follow the record. These buttons don't display on mobile devices.
- The Record Banner component doesn't support translation on the Topic Detail page.

Note: For optimal appearance, choose a wide column width when placing this component on your page. Some fields are hidden when there isn't enough space to display them due to browser width or zoom level.

1. From the Pages menu in Experience Builder, select Record Detail or your custom record detail page.
2. Select the **Record Banner** component, or drag the component from the Components panel to the page.
3. In the property editor, configure the properties for the component.

Property	Details
`Record ID`	The ID of the record displayed. Typically, this field is automatically populated.

Example:

Note: In the mobile app, lookup fields in the Record Banner component are shown as text, not links.

Sample Record Banner component in the Customer Service template.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Record Detail

Add the Record Detail component to a record detail or a custom page to show record information stored in Salesforce. This component is a great way to share information with site members who need it most, such as partners.

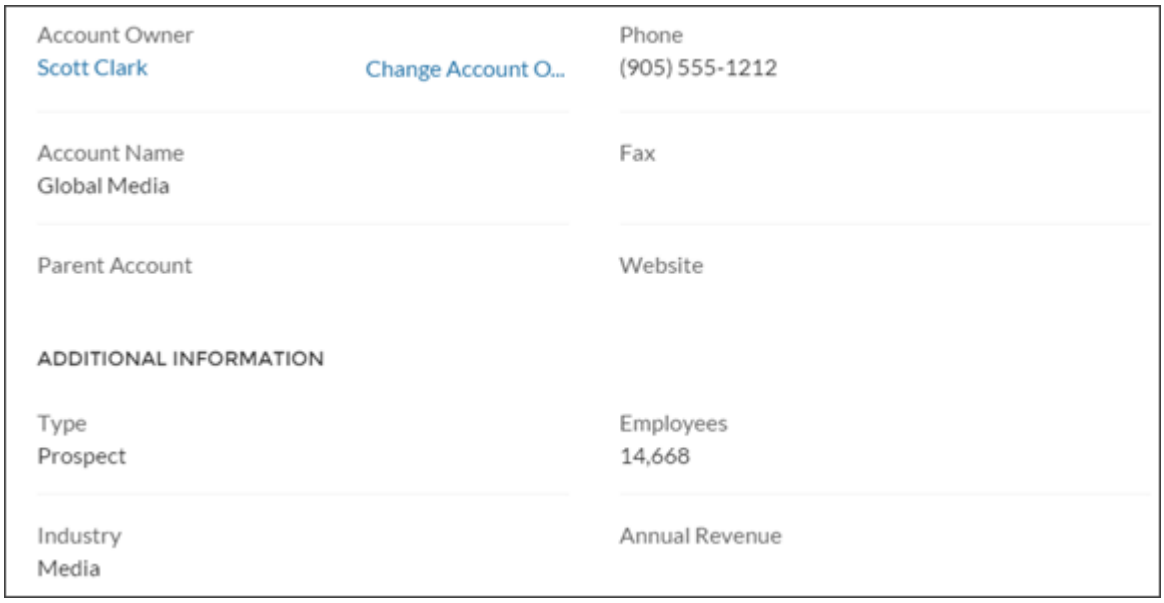
Users accessing the site on a mobile device have access to actions from the record detail page. For example, a partner user with create and edit access to accounts can create accounts or update an account as needed. However, edit inline, available on desktop, doesn't function in mobile or tablet display.

Note: To display the record feed, use one the feed components with the feed publisher component. To show the related records, use the Related Record List component. To show a combination of record details, related lists, and the record feed together, we recommend using the composite Record Information Tabs component.

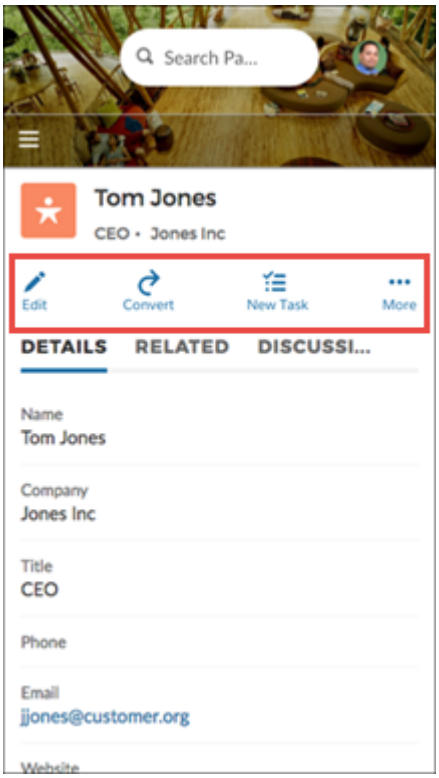
1. Select the **Record Detail** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Record ID`	The record ID. Typically, this field automatically picks up the record ID when the page loads.

Example: Example of a Record Detail component on a site.



Example of actions on a mobile device.



Record Information Tabs

The Record Information Tabs component uses the Record Detail Page and the Record Banner component to display detailed record information, lists of related records, and the record feed.

- You can use the Record Information Tabs component on custom record detail pages that you create. We recommend using it with the Record Banner component.
- You can modify what fields display in the Record Information Tabs component by customizing the object's page layout.
- Related lists in the related tab show the number of related records in each list in parentheses. For example, if there are five related contacts related to an account, the related list shows Contacts (5). If there aren't any related records, the list title shows (0).
- Site members with permissions can create new related records and send emails from the Related tab. They can also expand related record lists to see a longer list. These details are displayed on the generic Record Related List page. Related records in the related tab show the number of related records in parentheses.

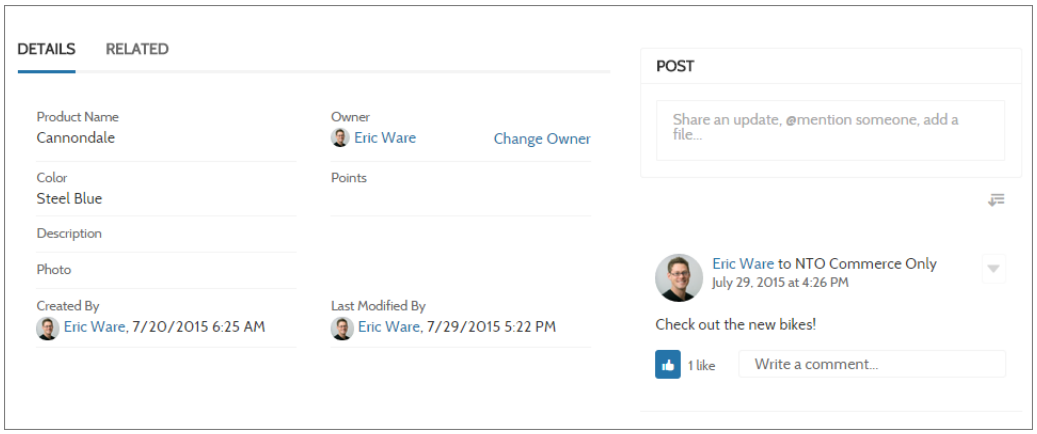
  Note: Emails are supported in accounts, contacts, leads, opportunities, and campaigns.

The Customer Service template supports a record detail page that you can use out of the box with no configuration. All objects in your site without a preassigned record detail page use this generic page, called Record Detail, to display record data. For example, consider the scenario where a user lands on a case detail page. The page uses a preassigned case detail layout. The user clicks a contact in the related records. If you haven't created a custom record detail page for contacts, the contact information is displayed using the generic Record Detail page.

1. From the Pages menu in Experience Builder, select Record Detail or your custom record detail page.
2. Select the **Record Information Tabs** component or drag the component from the Components panel to the page to add it.
3. In the property editor, configure the properties for the component.

Property	Details
`Record ID`	The ID of the record. This value is automatically populated.
`Details Tab Label`	Label for the tab that shows record details. The default label is Details.
`Related Tab Label`	Label for the tab that shows lists of related records. The default label is Related.
`Discussion Tab Label`	Label for the tab that shows the record feed. The default label is Discussions. This label is used on mobile devices only.

Example: Sample Record Information Tabs component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Record List

The Record List component shows a list of records on the Record List page. Users can view records, switch between record list views, and create records directly from the list view. If a user has no access to a particular list view, they see the Recently Used list view instead.

When you create a custom navigation menu item using the Salesforce Object type, it automatically links to a list of the records for the selected object. Templates provide a page to display such a list of records. This generic page is called the Record List page. It's used for all objects in your site that don't have a custom page assigned to them.

- The Record List component supports all Object Home page supported objects.
- You can use the Record List component on any page in your site. We recommend adding it to custom list views that you create. You can also create a navigation menu item to link to that page with its internal page URL.

1. Select the **Record List** component on the Record List page.
2. In the property editor, configure the properties for the component.

Property	Details
`Number of Records`	The number of entries retrieved to show in the list view. The default is 25. When the compact layout is selected, this property controls the number of records shown. If there are more than 25 records, users click a link to see the full list of records. The maximum number of records for the compact layout is 100. When the full layout is selected, this property controls the number of records initially shown. As a user scrolls down, more records are displayed. The maximum number of records per page for the full layout is 100.

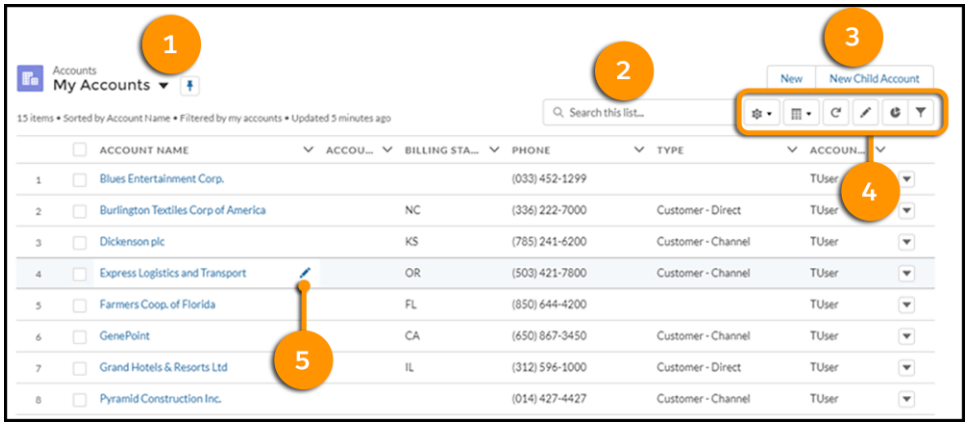
`Layout`	Choose from full, standard, or compact layout. The compact layout is ideal for showing short lists of information in a narrow column or when displaying your site on a mobile device. When a page using the full layout is viewed on a mobile device, the page automatically adjusts to a more mobile-friendly layout. To display the compact layout on mobile, explicitly select **Compact**.
	
	When choosing the layout, consider the following:
	
	• When using the full layout, use a column width of at least 50% of the page. We also recommend that you don't place another component below the Record List component on the page.
	  – Full layout has a minimum height of 700 pixels. If you place a component below the full layout of the Record List component, the Record List can overlap with the component that's underneath it.
	  – Full layout uses infinite scrolling. If you reference an object that contains many records, infinite scrolling can prevent site members from ever seeing the component below the Record List component.
	
	• Standard layout has some differences in display.
	  – Only the first four fields of the list view are displayed.
	  – When there is no data for the list view to display the Record List component is hidden.
	
	• Compact layout works in any size column. However, **View All** will always redirect to the object home (for example, case list or account list). We recommend that you create a standard page and add the compact list there. This arrangement avoids issues that can arise when the full list for object home has been deleted.
	
	If there aren't records to display for either a standard or compact list view, the component is hidden.

`Object Name`	The Salesforce object whose records you want to show. The dropdown shows the supported objects. The component supports all Object Home page objects. See Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates. If **Page's Object Name** name is selected, only `Page's Filter Name` is available in the Filter Name field.
`Filter Name`	The list view to show for the selected object. The dropdown shows only list views that are valid for the object you select.

Property	Details
`Allow list pinning`[1]	Lets users select their preferred default view for a record list. Enabled by default. Lists, as elsewhere in Salesforce, can't be unpinned, but users can select a new list to change their default view. Pinned lists almost always override menu and component list settings. The exception is when the navigation menu for a component receives its filter name from the name of the page—like `My Accounts`. To allow users to see their pinned lists, create at least one more menu item that takes `default` as the list view.
`Allow inline edit`[1]	Lets users edit individual fields in a list. Enabled by default.
Header Configuration	Click to expand.
`Show list actions`[2]	Displays available list view controls, such as new, sharing, filter, and any custom actions that you've created. Enabled by default. • Users require necessary permissions for the viewed object to use the **New** button on the component to create records. • For shared views, users need appropriate permissions to see the data. • Related Lists for Campaign members have quick filters to narrow results, but the resulting views can't be saved or shared. • Site members can use search and quick filters to quickly find information in their current session. Users can click to filter the list view or remove filters. They can also click to view related charts.
`Show list search`[1]	Displays search field, scoped to the displayed list. Enabled by default.
`Show refresh button`	Enabled by default.
`Show charts button`	Enabled by default.
`Show filter button`	Enabled by default.
`Show object name`	Enabled by default.
`Show image icon`	Enabled by default.
`Show display options`[1]	Lets users view records in a table or Kanban format, or restricts them to a single type of view. Default is **Show All Options**.

[3] Available for Full layout only and therefore unavailable when viewed on mobile devices.
[4] Guest users can't access filter or sort actions on any device.

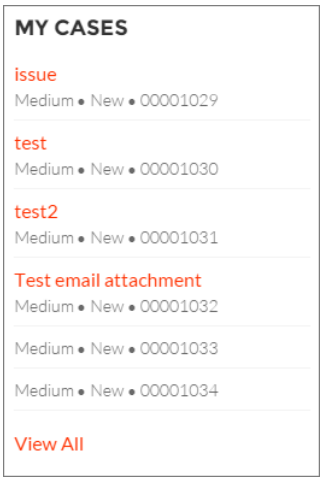
Example: Sample Record List component (Full layout):



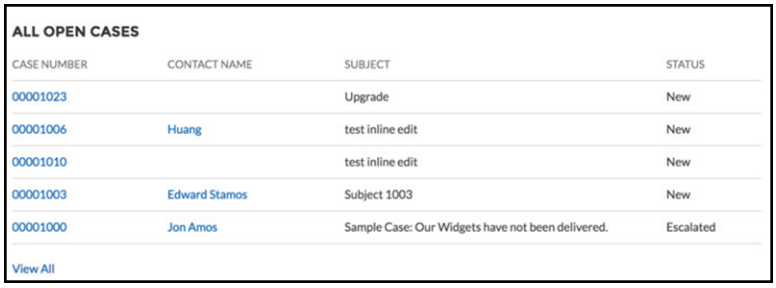
When all properties are enabled, site members can:

- Change the list view and pin it (1).
- Use search (2) to find items in long lists.
- Use list actions to accomplish list-related tasks, such as creating a record (3).
- Access list view controls (such as sharing settings), change how the list is displayed, view related charts, and filter the list view (4).
- Edit fields inline (5).

Sample Record List component (Compact layout):



Sample Record List component (Standard layout):



Note: We advise against using the Record List component to show products in a B2B Commerce store. A product Record List doesn't respect user entitlements and could expose information to users that you don't want them to see.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Objects Supported by Out-of-the-Box Components and Pages in Experience Builder Templates

Record Related List

The Record Related List component shows a list of all records that are related to a record. For example, if you're looking at an account, you can see a related list of contacts, opportunities, and activity history for that account. Use the Record Related List component on a generic Record Detail page or on a custom page to show a list of related records. Members can create records from the list and from lookups.

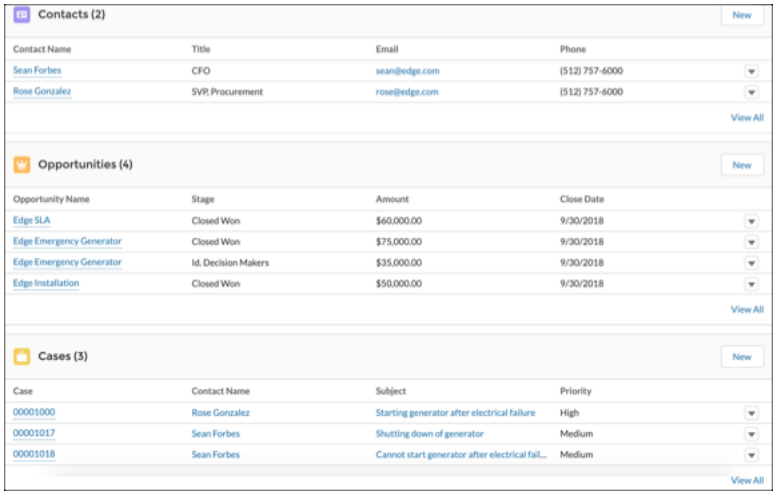
When a user expands the list of related records, the Record Related List page is displayed, which uses the Record Related List component under the hood. The component can occasionally be empty. For example, if there aren't any records related to the current record, or if the current record was created in the last 24 hours, no related items populate the component.

1. Select the **Record Related List** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Record ID`	(Required) The ID of the parent record.
`Layout Design`	Lay out width options to accommodate main body or narrow column placement of component.

Note: Related Lists for Campaign members have quick filters to narrow your results for fast results, but the resulting views can't be saved or shared.

Example: Sample Related Record List component:



Note: Record Related List row-level actions aren't available on mobile for Experience Builder sites.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Which Components Can I Use with Each Aura Template?

Related Record List

The Related Record List component shows, in a list, a single type of record related to a record. For example, if you're looking at an account, you can see a related list of contacts for that account. Use the Related Record List component on a generic Related Record List page or on a custom page. Members can create records from the list and from lookups.

When a user expands the list of related records, the Related Record List page is displayed, which uses the Related Record List component under the hood. The component can occasionally be empty. For example, if there aren't any records related to the current record, or if the current record was created in the last 24 hours, no related items populate the component.

Note: Using the Related List - Single component also allows you to show a single related list on a record. The Related List - Single component fills in the parent record ID dynamically, and allows you to select the related list you want to show.

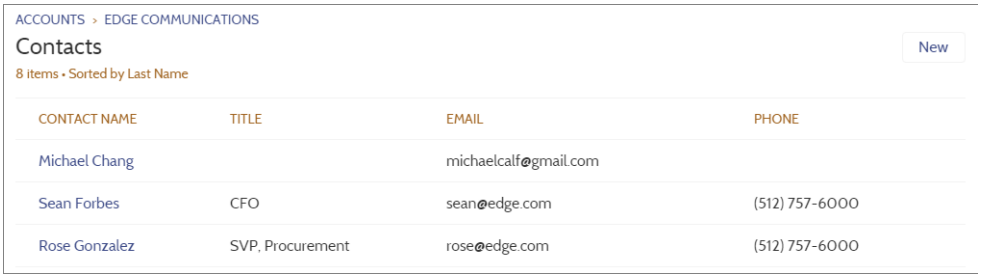
1. Select the **Related Record List** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Parent Record ID`	The ID of the parent record.
`Related List Name`	Name of the related list.
`Breadcrumbs`	Select to show breadcrumbs.
`Custom Title`	Select to display the title in the header.
`Row Numbers`	Select to show row numbers.

Property	Details
`Refresh`	Select to display the manual refresh button.

Note: Related Lists for Campaign members have quick filters to narrow your results for fast results, but the resulting views can't be saved or shared.

Example: Sample Related Record List component:



Note: Related Record List row-level actions aren't available on mobile for Experience Builder sites.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Related List - Single

The Related List - Single component shows a list of related records based on one specific object. For example, if you're looking at a contact detail page, you can specify to see the cases related to that contact, without seeing all other types of related records. Use the Related List - Single component on an object page or on a custom page to add specific, related information in context for the page. Members can create records from the list and from lookups.

Note: A new version of the Related List - Single component is available in Experience Builder with the Winter '21 release. If you use the old version of the component, shown as Deprecated in the component properties, the component still functions. If you delete your deprecated component, you must use the new version.

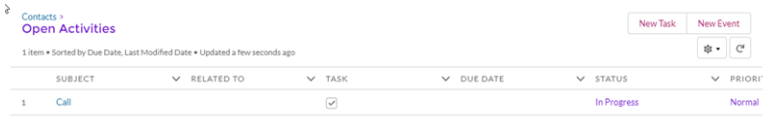
To see all related records, use the Record Related List component. When a user expands a related record, the detail page is displayed, which uses the Related List - Single component under the hood. The component can occasionally be empty. For example, if there aren't any records related to the current record, or if the current record was created in the last 24 hours, no related items populate the component.

1. Add the **Related List - Single** component to the page and select it.
2. In the property editor, configure the properties for the component.

Property	Details
`Related List`	The specific record type to retrieve and display for the page context.
`Layout Design`	Layout width options to accommodate main body or narrow column placement of your component.

Property	Details
`Change Related List Display`	Format presentation options for items in the list.

Example: Sample Related List - Single component:



Note: Row-level actions aren't available on mobile for Experience Builder sites.

Note: The Related List - Single component isn't supported for Files in the Salesforce mobile and tablet view.

Related Articles List

The Related Articles List component displays the articles related to the article the user is viewing.

In the Page Editor, you can configure the Related Articles List component on the Article Detail page.

The component can occasionally be empty. For example, if there aren't any articles related to the current article, or if the current article was published in the last 24 hours, no related items populate the component.

1. Select the **Related Articles List** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Number of Articles`	Enter the maximum number of articles to display in the list. You can display up to 10 articles. The default value is 5.
`Title`	Enter a title for the list of related articles. The default text is `Related Articles`.
`Show Views`	Select to show the number of times an article is viewed 2. Clear to hide the view count.

Example: Sample Related Articles List component:

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Related Questions List

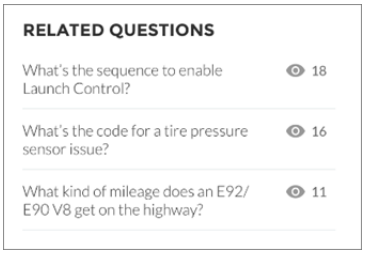
The Related Questions List component displays the questions related to the question the user is viewing.

In the Page Editor, you can configure the Related Questions List component on the Question Detail page. To use this component, your site must have a best answer for at least one question. The component can occasionally be empty. For example, if there aren't any questions related to the current question, or if the current question was asked in the last 24 hours, no related items populate the component.

1. Select the **Related Questions List** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Number of Questions`	Enter the maximum number of questions to display in the list. You can display up to 10 questions. The default value is 5.
`Title`	Enter a title for the list of related questions. The default text is `Related Questions`.
`Show Views`	Select to show only the number of times a question is viewed, remove liked or commented on, 2. Clear to hide the view count.

Example: Sample Related Questions List component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Related Topics List

The Related Topics List component displays the topics related to the topic being viewed by the user.

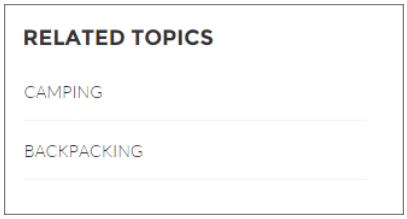
In the Page Editor, you can configure the Related Topics List component on the Topics View page.

For related topics to show up in this list, three different users must create at least three posts each, and their posts must have the same topics attached. The related topics appear for the topics attached in the posts.

1. Select the **Related Topics List** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Title`	Enter a title for the list of related topics. The default text is `Related Topics List`.
`Topic ID`	This field populates dynamically with the topic ID.
`Show the number of people using the Topic`	Shows the number of people who are using the topic.

Example: Sample Related Topics List component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Report Chart

Use the Report Chart component to add reports to your site pages. Display the reports that you set up in your Salesforce org's public folder.

When you click a report, you see the Report Detail page, which shows the Report Summary component. The report summary includes details from the source report in Salesforce.

Note: In Report Chart properties, only the reports that have a chart appear on the dropdown list.

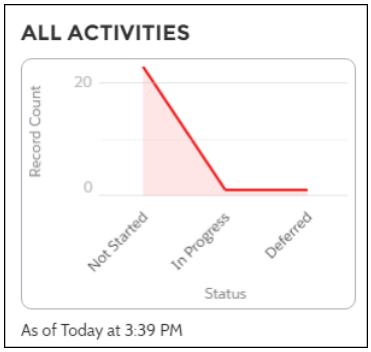
1. Drag the Report Chart component to the page, and select it.
2. In the property editor, configure the properties for the component.

Property	Details
`Report Name`	Reports with charts that are available for use in the site.

Property	Details
`Filter By`	Setting a filter on the report chart data is supported only for record pages. If you set a filter option, the Report Chart component displays only that filtered data to users.
`Refresh Time (Minutes)`	The number of minutes between each report refresh.
`Show report name`	Adds the report name to the site page.
`Show refresh button`	Shows a refresh button, so users can refresh the chart.

Warning: Instead of a report's developer name, the Report Chart component uses the ID of an associated report to populate the component. If a site page is deployed to another environment (such as from Sandbox to Production), the component breaks if the target org doesn't contain a report with the same ID. If the target org contains a different report that uses the same ID as the source org, the component references the wrong report.

Example: Report Chart component:



Report List

The Report List component lets users view reports in list form.

The report list can be filtered with these criteria:

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

In addition, users have access to report folders. Folders include:

- Created by Me
- Shared with Me
- All Folders

The Report List component doesn't have any editable properties.

Note:

- The Report List component can only be used on the Report List page.

- The Filter, Group, and Summary options aren't available to users accessing reports from an Experience Cloud site on mobile devices, including apps accessed through the mobile browser and apps created with Mobile Publisher.

Report Summary

The Report Summary component lets users see a snapshot of the report details from the source report.

Use the Report Summary component on the Report Detail page to see a report's details. Using the component, members can see a report chart, filter data, see the feed, refresh the report, or change its settings. Members with sufficient permissions can also clone, save, export, or subscribe to the report.

1. Select the **Report Summary** component in the Report Detail page.
2. In the property editor, configure the properties for the component.

Property	Details
`Report Id`	This field autopopulates with the record ID of the report.

Reputation Leaderboard

The Reputation Leaderboard component displays a list of site members with the highest reputation points.

In the Page Editor, you can configure the Reputation Leaderboard component on the Home page.

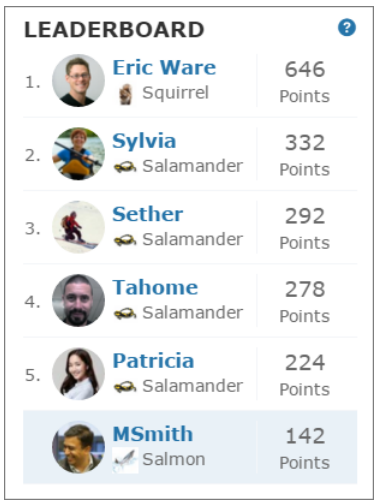
1. Select the **Reputation Leaderboard** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Title`	Enter a title for the reputation leaderboard. The default text is `Leaderboard`.
`Number of Users`	Enter the maximum number of users to display. You can display up to 10. The default is 5.
`Show user rank`	Displays the ranks of the users shown in the leaderboard.
`Show logged-in user`	• If the logged-in user does have rank, the user is highlighted on the leaderboard. • If the logged-in user doesn't rank on the leaderboard, a row for the user appears at the bottom of the leaderboard. • If the logged-in user ranks on the leaderboard, AND the Show User Rank checkbox is selected, AND `Knowledge and Points` or `Knowledge and Last Active` is displayed, the user sees a message about their ranking. For example, "Congratulations! You rank #2."
`Show help bubble`	Displays a question mark icon at the top of the leaderboard that a user can hover over to get more info.
`Exclude internal users`	Excludes internal users from the leaderboard.
`Help Bubble Text`	Enter the message that appears when a user hovers over the question mark icon. The message can be up to 500 characters. The default text is `Earn points and climb to new levels when you contribute in the experience!`

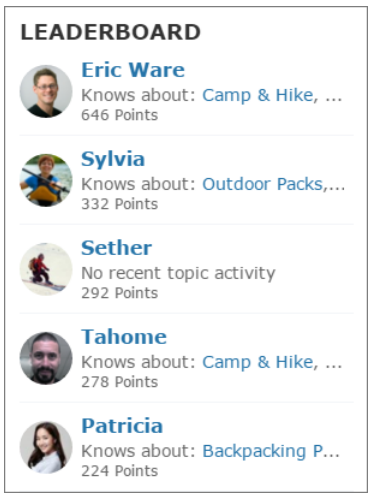
Property	Details
`Display Users`	Determines what information about a user shows in the leaderboard. Options include: • Levels and Points—Shows a user's reputation level and total number of reputation points. • Knowledge and Points—Shows a user's total number of reputation points and topics that they're knowledgeable about. • Knowledge and Last Active—Shows topics a user is knowledgeable about and when the user was last active.
`Topic Knowledge Label (Up to 20 chars.)`	When Knowledge is shown in the leaderboard, this text appears before the topics a user is knowledgeable about. The default text is `Knows about`. For example, if a user is knowledgeable about backpacks, their leaderboard entry can say "Knows about: Backpacks."

Example: Sample Reputation Leaderboard component:

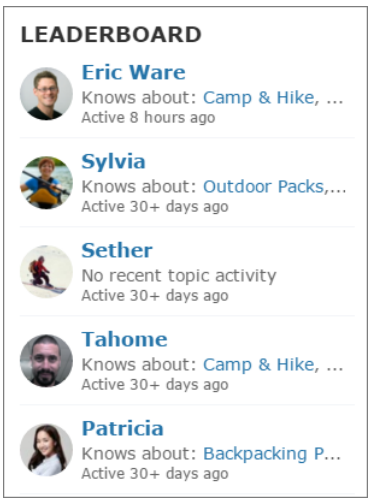
Level and Points



Topics and Points



Topics and Last Active



SEE ALSO:

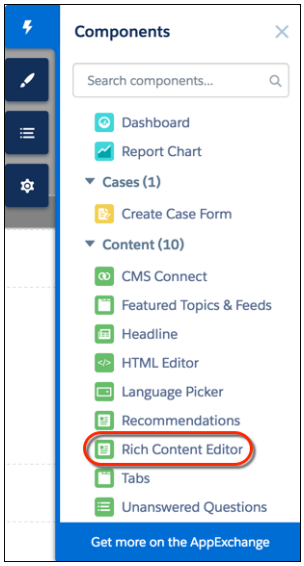
Which Components Can I Use with Each Aura Template?

Rich Content Editor

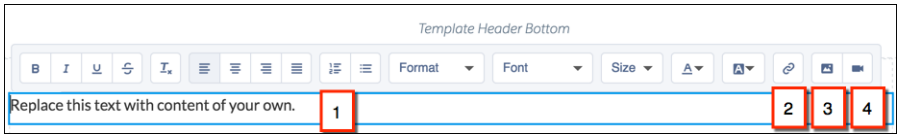
The Rich Content Editor component lets you add formatted custom text to your site pages, along with images and videos.

If you prefer to create and edit your content in HTML, use the HTML Editor component.

1. In Experience Builder, drag the Rich Content Editor component from the Components panel onto the page.



2. Add and format text (1), and add links (2), images (3), or YouTube or Vimeo videos (4) directly in the editor.



When you add an image to your site for the first time, an asset file is automatically created and stored in the Org Asset Library.

Note: If public access is enabled in Experience Builder at the page or site level, the **Let guest users view asset files and CMS content available to the site** preference is enabled in **Administration** > **Preferences**. This preference remains enabled as long as any page has public access enabled. If you upload images for use on site login pages, be sure that this preference is enabled.

Images and videos are supported only in Rich Content Editor components that were added after the Spring '16 release.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

3. Optional: To add alt text to an image in the Rich Content Editor component, right-click the image when the component is in edit mode. Select **Add Alt Text**, enter your text, and click **Add**.

SEE ALSO:

Find and Create Asset Files in Experience Builder

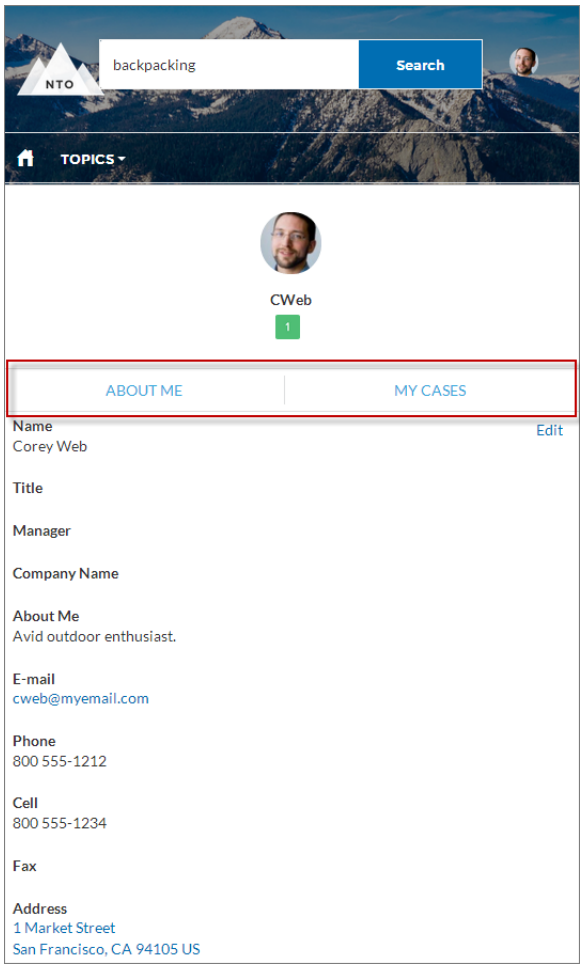
HTML Editor

Scroll To

Custom code on the Profile page in the Customer Service template lets users scroll to the selected component from a user's profile page, which saves a mobile user from having to scroll to a profile component that isn't visible on his or her device.

1. On the Profile page, right-click the area of custom code below the User Profile Header, and click `Edit`.
2. In the Edit Code page, you can change the labels that let mobile users navigate in their profile.

Example: Sample Scroll To component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Search Results

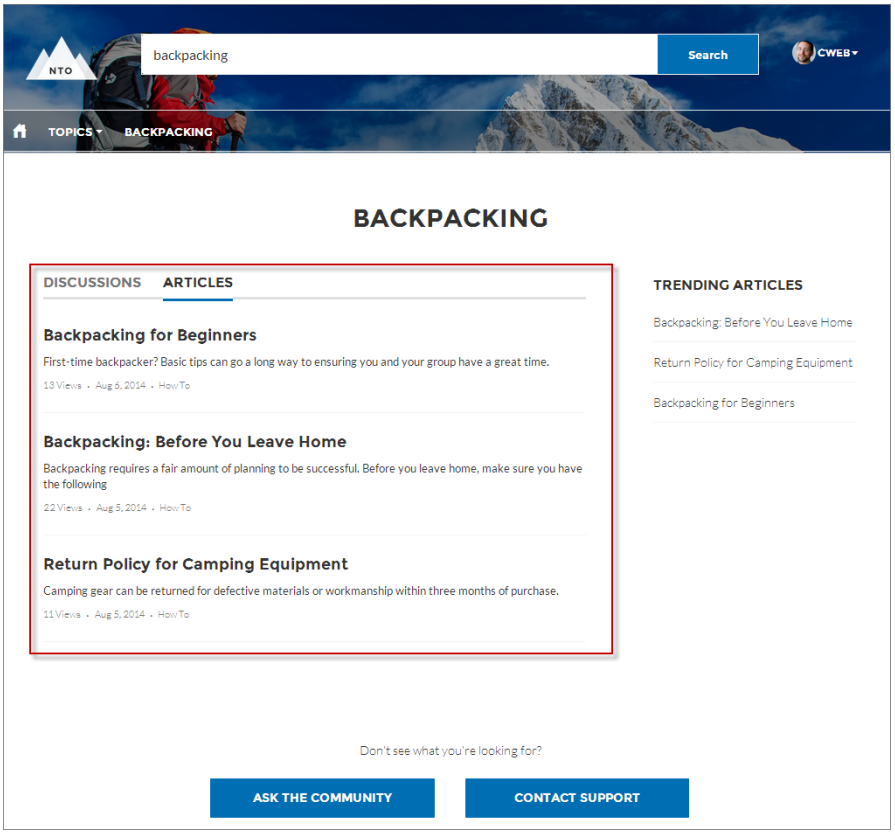
The Search Results component lets users view tabbed lists of articles and discussions. The articles and discussions are returned when a user selects a topic or types a string in the Search Publisher.

1. Select the **Search Results** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Articles Tab Label`	Enter the text that appears on the tab that users select to view the list of returned articles. The default text is `Articles`.
`Discussions Tab Label`	Enter the text that appears on the tab that users can select to view the list of returned discussions. The default text is `Discussions`.
`Topic ID`	The expression in the `Topic ID` field uses the topic ID that the user selects when filtering by topic.
`Search Term`	The expression returns results based on the text users enter when typing their search queries.
`Active Tab`	Specify which tab you want to appear as selected with its contents exposed, when the page loads. The expression retrieves the parameter from the query string in the URL for the page. Type *`articles`* to display the article search results first or *`discussions`* to display the contents of the discussion search results first.
`Number of Articles`	Enter the maximum number of articles to show in the component.
`Show Article Tab`	Select this checkbox if you have Salesforce Knowledge enabled and want site members to search for and view articles.
`Default Sort Order for Feed`	The default sort order for the feed on the Discussions tab. Presents site members and guests with the initial experience that you intend. If users change the sort order in their view, their selection sticks.
`Show a streamlined question feed on the Discussions tab`	Select to show a compact feed on page 273 on a search results Discussions tab.

Important: For articles to show up in the Search Results component, they must be associated with a topic. Moreover, the site language and article language must match.

Example: Sample Search Results component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Stream Detail

The Stream Detail component is available to repair the Stream Detail page in the event its Stream Detail component is mistakenly removed.

1. In the Experience Builder, select the **Stream Detail** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Stream ID`	Stream ID has a default variable value that gets the ID of whatever stream was selected on the Stream List page. We recommend that you leave this value at its default, `{!recordId}`. Changing this value fixes the display to one stream that only one site member has access to. That is, the member who created the stream with the fixed ID you enter here.

Stream List

The Stream List component is available to repair the Stream List page in the event its Stream List component is mistakenly removed. The Stream List component has no properties.

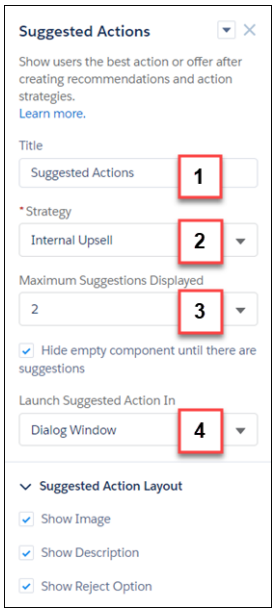
Suggested Actions

USER PERMISSIONS

To create an Experience Cloud site:	Create and Set Up Experiences AND View Setup and Configuration
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences • OR • Be a member of the site AND an experience admin, publisher, or builder in that site
To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences • OR • Be a member of the site AND an experience admin or publisher in that site
To run a suggested action in an Experience Builder site	Run Flows OR Flow User field enabled on the user detail page OR If **Override default behavior and restrict access to enabled profiles or permission sets** is selected for an individual flow, access to that flow is given to users by profile or permission set

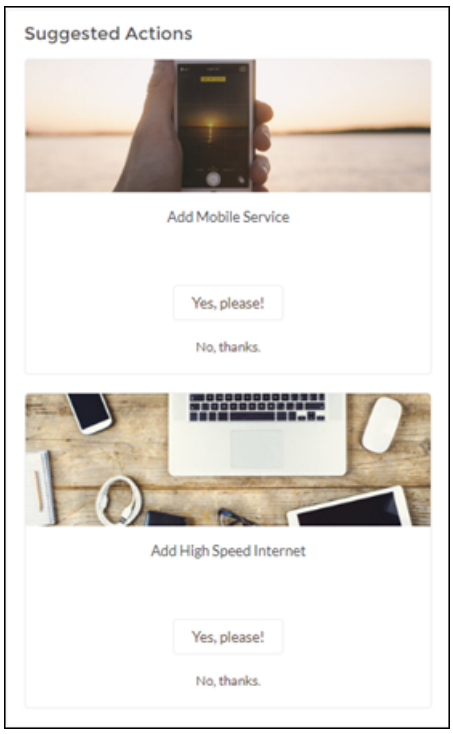
Suggested Actions brings the power of Einstein Next Best Action into sites. Choose strategies that apply your org's business rules to display suggested offers and actions.

1. Create a recommendation strategy in the Strategy Builder.
2. Drag the Suggested Actions component onto your site page.
3. In the property editor, enter the title that you want customers to see (1) and select the strategy you want to display (2). Enter the maximum number of suggestions to display (3) and choose where the suggested actions open (4).



- Title—Displays this title for the component on the site page. The default title is Next Best Action.
- Strategy—Displays all available strategies created in Strategy Builder.
- Maximum Suggestions Displayed—Allows up to four suggestions to display when there are multiple suggested actions available.
- Hide Empty Component—Hides the component when there are no suggested actions initially available. If there are actions available when the app opens, the component continues to display, even if the actions run out.
- Launch Suggested Actions In—Specifies whether your suggestions open in a display window, a new browser window, or on a site flow page.
- Show Image—Shows images associated with each suggested action. If the recommendation doesn't have an image, a placeholder displays.
- Show Description—Displays the description defined on the Recommendation record.
- Show Reject Option—Displays the reject option associated with suggested actions.

Example: Here's how a strategy looks when it displays in a site.



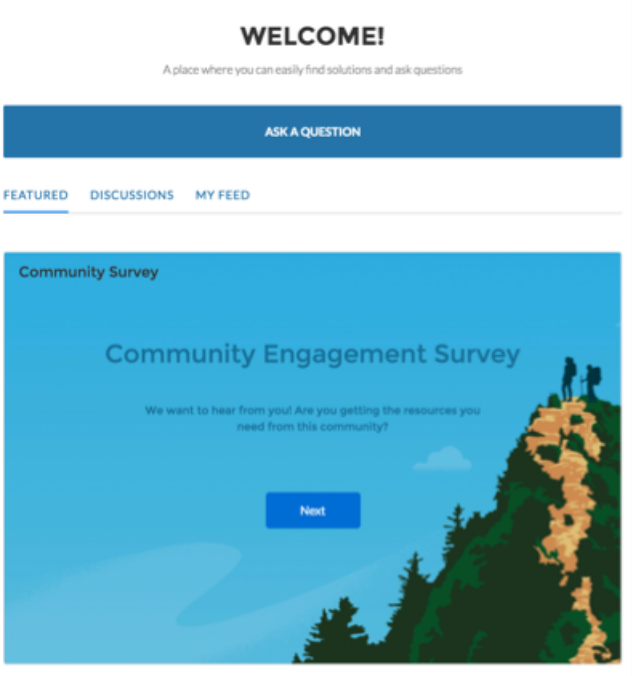
Survey

Use the Survey component to embed active surveys into your site's pages.

1. In the page that you're configuring, select the **Survey** component.
2. In the property editor, configure the properties for the component.

Property	Details
Survey Name	Select an active survey.

Example: Sample Survey component:

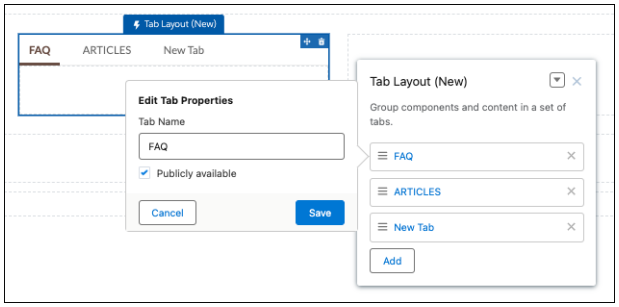


Tab Layout

Use the Tab Layout component to group other components in a set of customizable tabs for structure. Add as many tabs as you need and whatever components you want. You can rename and reorder the tabs, and choose whether to show or hide individual tabs to guest users in the site.

The Tab Layout component is a replacement for the Tabs component and offers better performance for your Aura site. The Tabs component still works, but because it's deprecated, we recommend that you move your content from Tabs to Tab Layout for the most up-to-date experience.

1. Add the Tab Layout component to a page, or select it on the page that you're configuring.
2. In the property panel, configure the component.
   - To add another tab, click **Add**.
   - To rename a tab or set its public availability, select the tab. To make that tab available to guest users in the site, select **Publicly available**. If no tabs are publicly available, the entire Tab Layout component is hidden from guest users.
   - To reorder a tab, drag the tile into a new position.



3. Add components to each tab. You can't add a Tab Layout component to another Tab Layout component.

Important: If you applied custom CSS to the old Tabs component, it doesn't automatically apply to Tab Layout. The newer component uses a different markup from Tabs, so you must adjust the CSS to target the new CSS selector. For example, if you used custom CSS to target the CSS class `uiTabItem` on the Tabs component, that custom CSS must now target `slds-tabs_default__item` on Tab Layout.

To present the new tab labels in other languages for a multilingual site, export your site content, translate the tab names, and import the translation back to your site.

SEE ALSO:

Which Components Can I Use with Each Aura Template?

Multilingual Sites

Tile Menu

Use the Tile Menu Lightning Web component in Experience Builder to add an intuitive and visually stunning navigation experience to your site.

Customers using the Tile Menu can use images to access an external site, page, record, or global action. For example, clicking an image takes a customer to a page to log a case or file a claim. You can set up a maximum of eight image-link combinations per Tile Menu component.

Consider the following when setting up your Tile Menu:

- To make the images in the tile menu viewable by guest site users:
  - Enable **Let guest users view asset files and CMS content available to the site** in **Administration** > **Preferences** in Experience Builder.
  - Access the site's guest user profile and **Object Settings**.
  - Then, give read access to Documents.
- When using Translation Workbench to translate text in the Tile Menu, select **Navigation Menu Item** as your **Setup Component**.
- A new version of the Tile Menu component was included in the Summer '20 release, and allows for much more customization. The new version of the Tile Menu is available in Experience Builder in the Summer '20 release. If you use the old version of the component, shown as Deprecated in the component properties, the component still functions. If you delete your deprecated component, you must use the new version.

Note:

- You can package a tile menu with Bolt Solutions and distribute them. All the properties of the tile menu are included in the package, but admins have to associate a navigation menu to the tile menu after the Bolt Solution is installed.
- To see a Tile Menu and its images from a production org, use a Full sandbox.
- The Tile Menu allows a maximum of 20 tiles.

1. From the components list, select the Tile Menu component and drag it onto a site page.
2. On the page, select the **Tile Menu** component.
3. In the property editor, configure the properties for the component.

Property	Details
Default Navigation Menu	Select a navigation menu to showcase in Tile Menu.
Edit Navigation Menu	Click to edit your chosen navigation menu.
Image Layout	Select one of the three image options for the images in each menu tile. • Full, No Overlay: Image takes up the whole tile. The banner with text doesn't overlay the image. • Full, With Overlay: Image takes up the whole tile. The banner with text overlays the image. • Partial: Image is contained in an icon-type box within the tile.
Tile Formatting	Click to expand.
Show banner	For the Full, With Overlay layout, choose to show a banner.
Banner Position	Options for: • Full, No Overlay: Top • Full, With Overlay: Top or Bottom • Partial: Top, Right, Left, Bottom
Banner Height	Choose 15–100%. This setting doesn't apply to the Full, No Overlay layout.
Banner Background Color	Set the color for the banner background.
Border Radius	Choose from 0-50px.
Blank Image Color	Tile color if there's no image.
Tile Background Color	For the Partial layout, the background tile color if the image doesn't take up the entire tile.
Icon Size	Size of the icon containing the image for the Partial layout. Choose from small, medium, or large.
Text Formatting	Click to expand.
Color	Text color.
Size	Text size. Choose from small, medium, or large.
Horizontal Alignment	Choose from right, left, or center.

Example: Example of a tile menu.

SEE ALSO:

Navigation Menu

Assign an Audience to a Component Variation

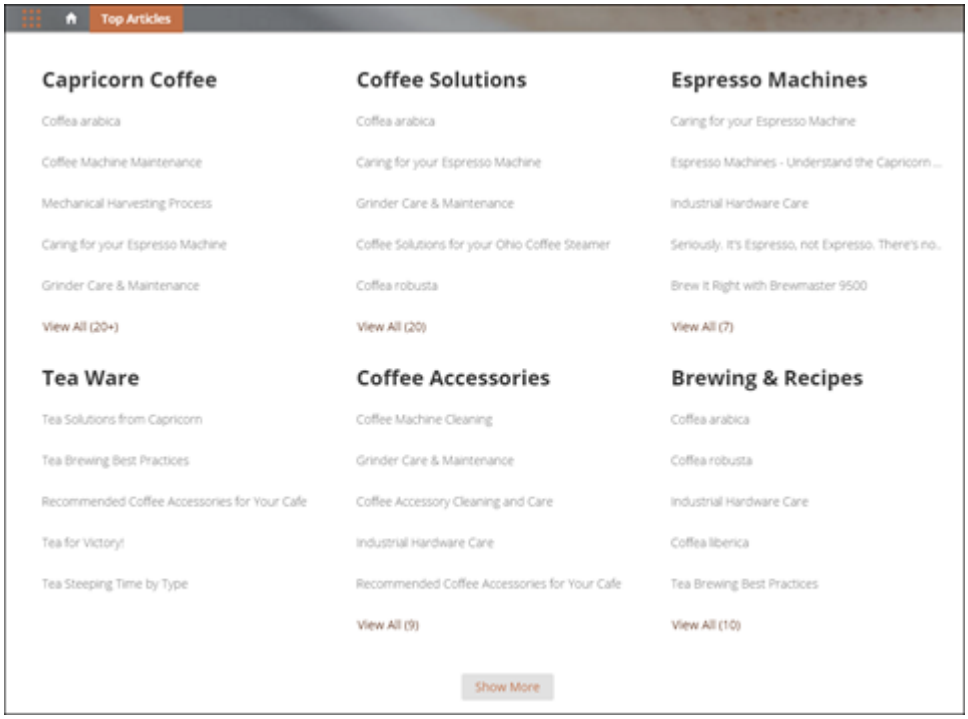
Top Article by Topic

Give your customers more direction when they're browsing your knowledge articles in an Experience Builder site. Using the Top Articles by Topic component, you can organize topics in one view. Articles populate under the topics, ranked by view count.

1. Select the **Top Articles by Topic** component.
2. In the property editor, configure the component.
   - To add another topic, click **Add**.
   - To set a topic's public availability, select the topic. To make that tab available to guest users in the site, select **Publicly available**.
   - To reorder topics, drag the tile to the correct position.
   - Indicate the number of articles to list under each topic (maximum 10).

   Note: If you delete a topic from a site, but have it referenced in the Top Articles by Topic component, the topic name doesn't show. The articles, however, are listed under a blank topic name. To not see the article list, delete the topic name from the Top Articles by Topic component as well.

Example: Top Articles by Topic component in use:



Topic Catalog

The Topic Catalog component lets Experience Builder site members see a full listing of navigational parent and subtopics you have set up for the site in one convenient location.

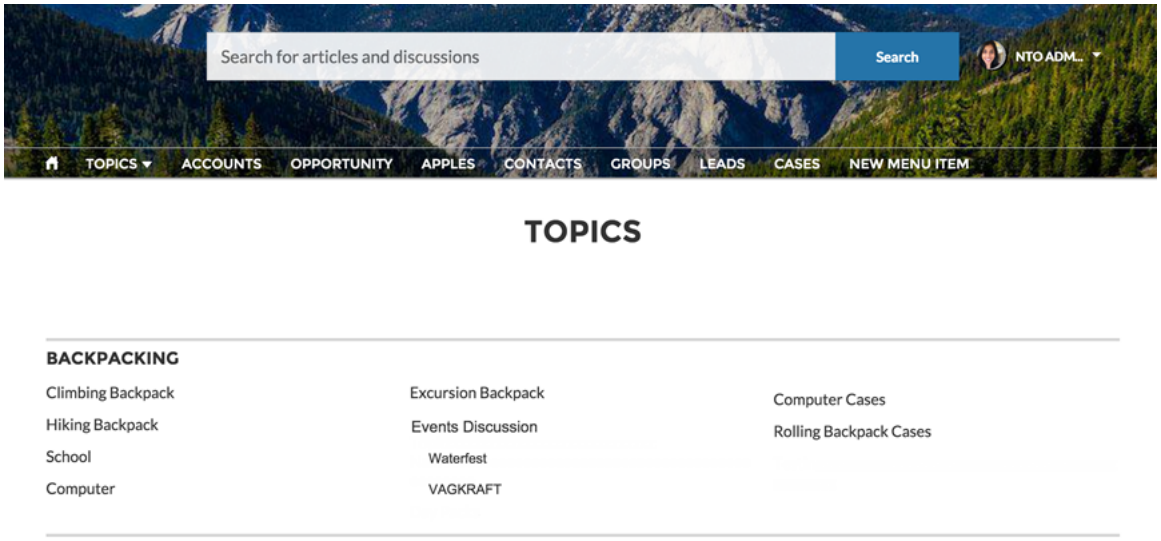
The following is the maximum number of navigational topics and subtopics you can have in a Customer Service template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

Note: The topic catalog shows only navigational topics and subtopics, and is only visible after you set them up.

1. Edit the Navigation Menu component in your site (typically, on the home page).
2. Select **Add the "More Topics..." link**.

Example: When site members click `More Topics` from the Topics list in the navigation menu, they see the topic catalog.



SEE ALSO:

Which Components Can I Use with Each Aura Template?

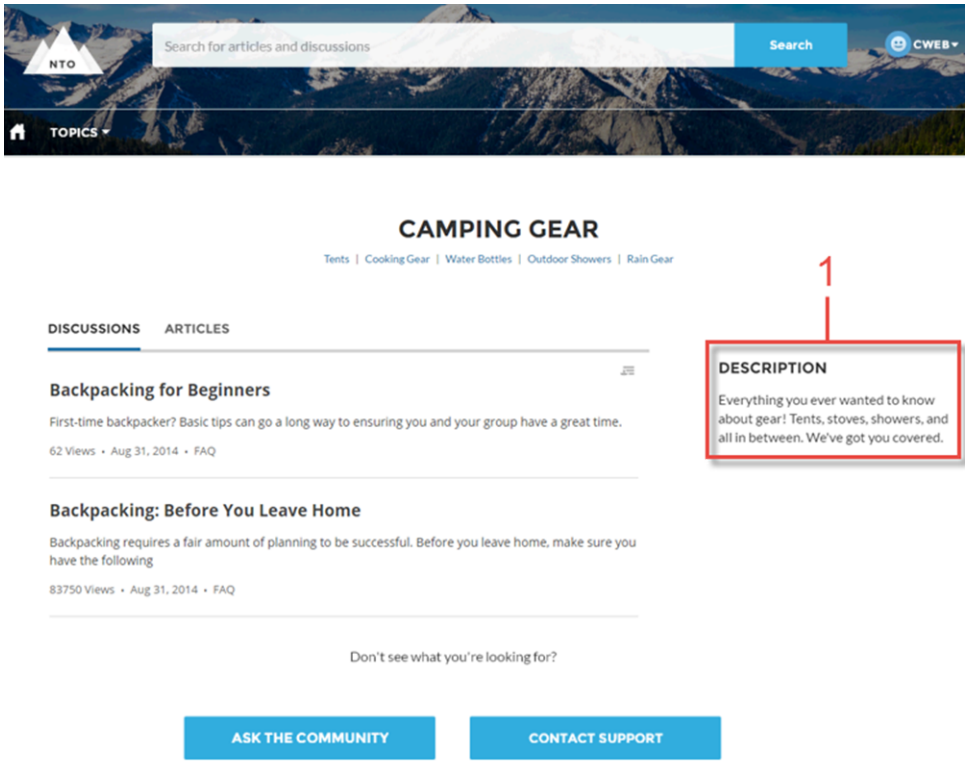
Topic Description

The Topic Description component is used on the Topic Detail page in the Customer Service template. It shows the topic's description as entered in **Content Management** > **Topics**.

1. Select the **Topic Description** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Topic ID`	The system supplies this value, and populates the component with the description tied to the topic shown on the topic detail page.
`Title`	Enter text for the title. The default text is `Description`.

Example: Sample Topic Description component.



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Topic Metrics

The Topic Metrics component lets users see how often site members use a topic.

You can show the number of posts, articles, and followers that a topic has, and how many people have used the topic in the last 60 days. Use the Topic Metrics component on the Topic Detail page.

1. Select the **Topic Metrics** component on the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Show Posts`	Enable this setting to show the number of posts tagged with the topic. For navigational topics, the number of posts includes posts tagged with the topic and posts tagged with subtopics. The number of posts that use the topic can be inaccurate but provides a good comparative measure of how often people use the topic in posts.
`Show Articles`	Enable this setting to show the number of articles tagged with the topic.
`Show Followers`	Enable this setting to show the number of people following the topic.

Property	Details
`Show how many people used the topic in the last 60 days.`	Enable this setting to show how many Experience Builder site members have used the topic in the past 60 days.
`Topic ID`	This field populates dynamically with the topic ID.

Topics

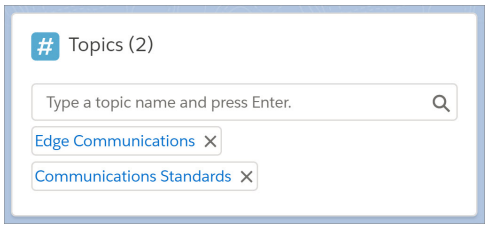
The Topics component allows your site members to add topics to records to organize them by theme in your Experience Builder site.

Add the topics component to record detail pages for objects that have topics enabled.

1. Select the **Topics** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Title`	Enter a title for the component. The default text is *`Topics`*.
`Placeholder Text`	Enter placeholder text that appears in the topic editor to encourage members to enter topic names. The default text is *`Type a topic name and press Enter.`*
`Number of Topics Shown`	Enter the number of topics to show before the Show More link appears. The default number is *`10`*.

Example: Sample Topics component:



Totals

The Totals component displays count summaries related to the site group, such as number of posts, members, and likes.

The Totals component displays as Summary on a page. It's visible only to users who have reporting permissions in orgs that have group engagement. You can also choose to make the component visible only to group managers.

1. Select the **Totals** component in the page that you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Group ID`	The group's ID. Typically, this field is populated when the page loads.
`Visible only to managers`	To make the chart visible only to group managers, select the box.

Example:

Trending Articles by Topic

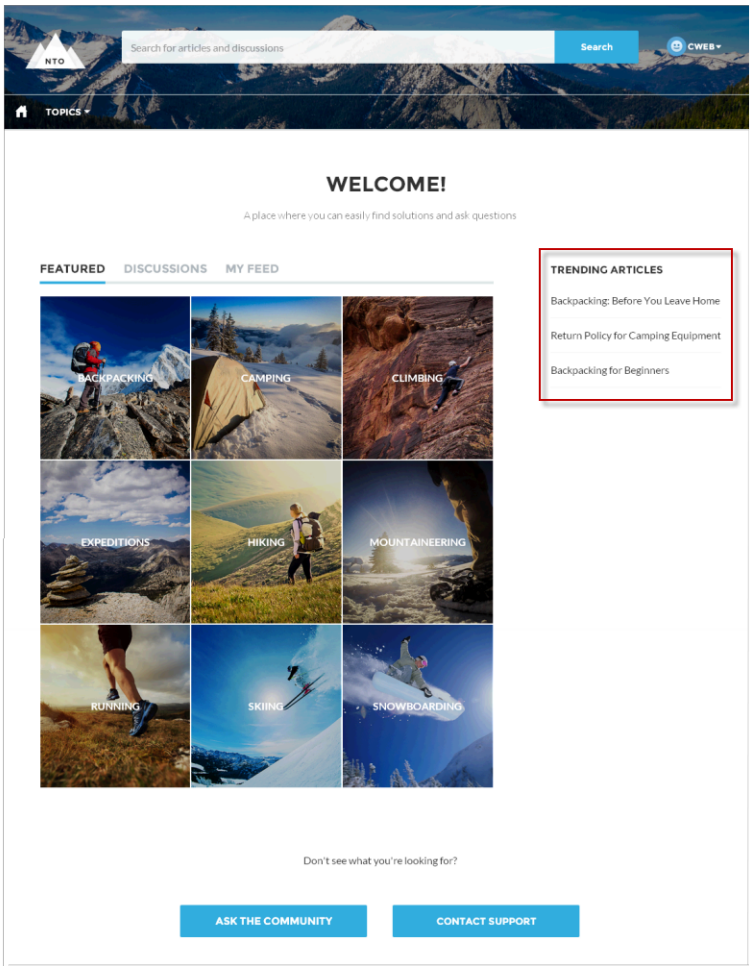
The Trending Articles by Topic component displays the most popular articles in your Experience Builder site organized by topic.

An article's popularity is based on the number of recent views.

1. Select the **Trending Articles by Topic** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Title`	Enter the text that is the title for the component. The default text is *`Trending Articles`*.
`Number of Articles`	Enter the maximum number of trending articles to display.
`Topic ID`	The ID from the topic that the user selects to display the list of articles. To display articles from all managed topics, leave this field blank.

Example: Sample Trending Articles by Topic component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Trending Topics

The Trending Topics component displays the popular topics in your Experience Builder site.

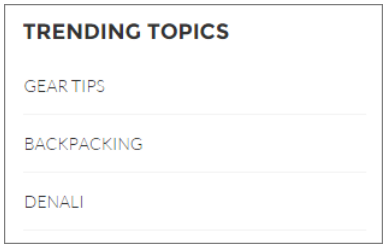
In the Page Editor, you can configure the Trending Topics component on the Home page.

1. Select the **Trending Topics** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Title`	Enter a title for the list of trending topics. The default text is `Trending Topics`.
`Number of Topics`	Enter the number of trending topics to display. You can display a maximum of five topics at a time.

Property	Details
`Show the number of people using the Topic`	To show the number of people who are using the topic, check the box.

Example: Sample Trending Topics component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Unanswered Questions

The Unanswered Questions component lets users see the most viewed unanswered questions in a site. The component shows the top unanswered questions based on the view count across the site. As questions are answered, they are removed from view.

1. Select the **Unanswered Questions** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Title`	The title of the component. The default text is *`Do you have the answer?`*.
`Number of Questions`	Enter the number of questions to show on the list. The default is 5.
`Show views`	Show the number of times the question has been viewed by users.

User Profile

The User Profile component shows detailed information about a user. Details include contact information, profile photo, Chatter statistics, topics the user is knowledgeable about, who the user is following, and the user's followers.

The User Profile component uses a two-column layout by default. Profile details and the profile image are always shown, but you choose if you want to show related lists, Chatter statistics, and Knows About. You can also customize labels.

The layout of the component makes it ideal for viewing your site on a mobile device. When viewed on a mobile device or tablet, the component uses a single-column layout with four tabs: Feed, Cases, Details, and Related. The Cases tab is visible only when users view their own profile. You can edit all tab labels.

If nickname display is enabled for the site, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

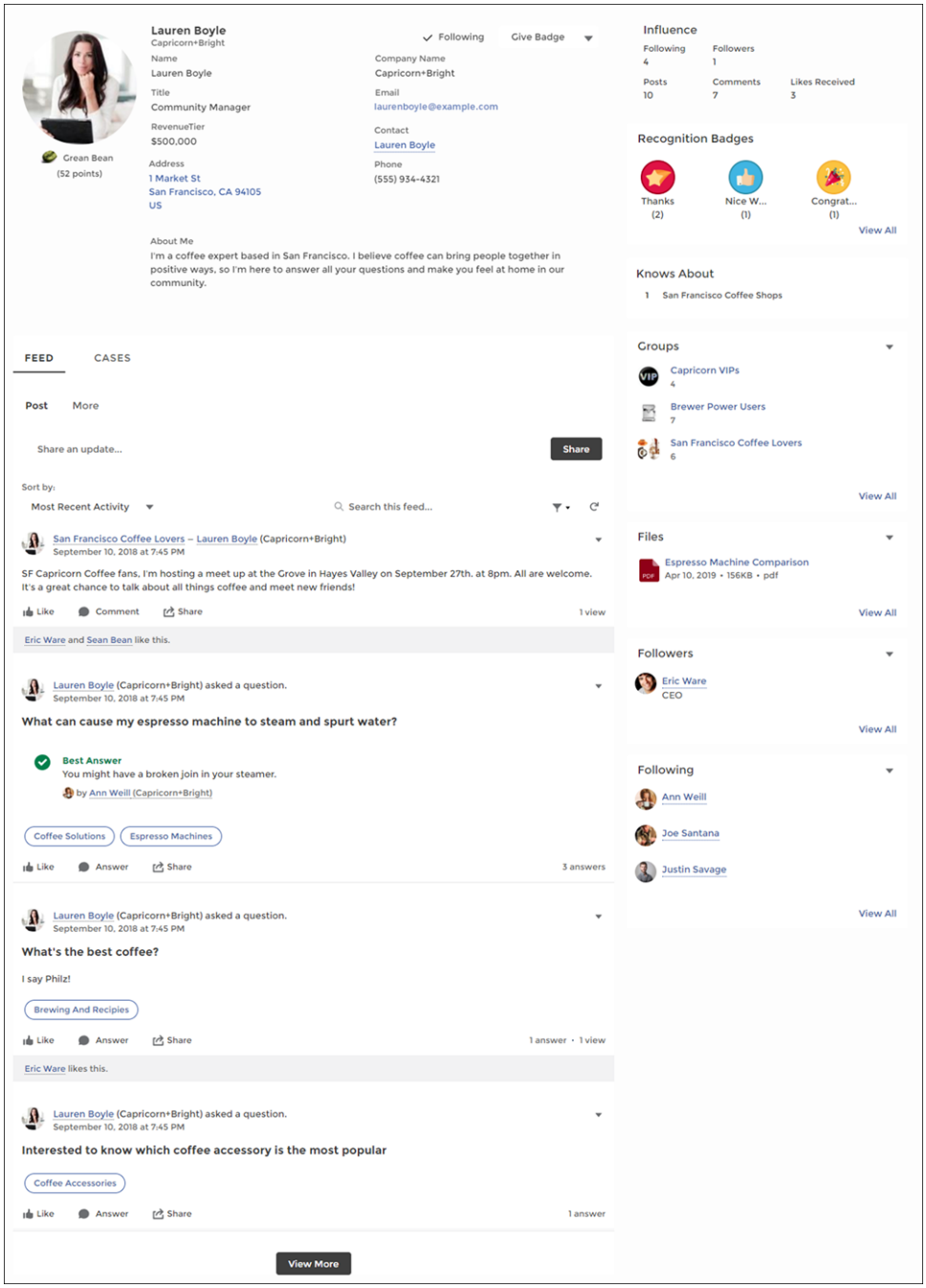
If you prefer, you can create a custom layout with more granular control over the placement of user profile content. Create a custom site page, and use the profile components to build your own version of a profile. Profile components include the User Profile Summary, User Profile Tabs, User Profile Statistics, User Profile Knows About, and User Profile Related List components.

1. Select the **User Profile** component in the page you're configuring.
2. To view the properties component, select the Properties pane:

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Show All Updates as the Default Feeds Filter`	When this box is selected, the feed automatically defaults to the All Feeds filter. If it isn't selected, the feed defaults to the Posts Created by this User filter.
`Show Influence`	Determines if the user's Chatter statistics are shown. Statistics include number of posts and comments, likes received, followers, and people they're following.
`Influence Label`	Enter a title for the Influence list. The default text is *`Influence`*.
`Show Knows About`	Determines if the Knows About list is shown.
`Knows About Label`	Enter a title for the Knows About list. The default text is *`Knows About`*.
`Maximum Topics in Knows About Displayed (up to 10)`	Enter the maximum number of topics listed for each user in the Knows About list, up to a limit of 10.
`Show Recognition Badges`	Determines if the Recognition Badges card is shown.
`Recognition Badges Label`	Enter a title for the Recognition Badges card. The default text is *`Recognition Badges`*.
`Button Text`	Enter the text you want to display on the button for awarding badges to other users. The default text is *`Give`*.
`Show Related Lists`	Determines if related lists are shown. Related lists can include Followers, Following, Groups, and Files.
`Feed Tab Label`	Enter the text you want to display on the tab that users select to view a user's Chatter feed. The default text is *`Feed`*.
`Cases Tab Label`	Enter the text you want to display on the tab that users select to view their cases. This only displays for users on their own profile. The default text is *`Cases`*.
`Cases Tab Header Label`	Enter the text for the label that appears at the top of the list of cases. The default for this field is *`My Cases`*.
`Case Filter Name or ID`	Enter the name of the list view that displays cases.
`Create Case Label`	Enter the text you'd like to display on the button that users can click to create a case. The default text is *`Create Case`*.

Property	Details
`Record Details Tab Label (Mobile only)`	Determines if a record details tab appears. Record details include profile details, Knows About, and Influence. The default label is *`Details`*. Available only when a site is viewed on a mobile device.
`Related Records Tab Label (Mobile only)`	Determines if a related records tab appears, such as Groups, Files, Followers, and Following. The default label is *`Related`*. Available only when a site is viewed on a mobile device.

Example: Sample User Profile component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Detail

The User Profile Detail component shows details about a user including contact information, profile photo, Chatter statistics, and topics the user is knowledgeable about. On other users' profiles, it also shows a Follow button.

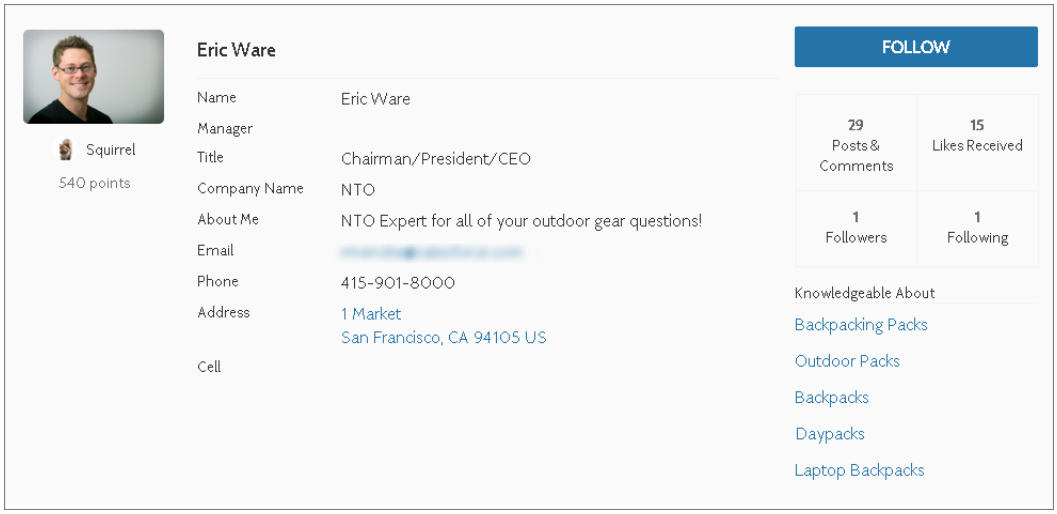
Chatter statistics for the site include number of posts and comments, likes received, followers, and people the user is following. Knowledgeable About shows top topics that people know about, so the site can quickly see areas of expertise. Topic knowledge is calculated based on factors such as best answers, mentions, or likes on questions and posts.

If nickname display is enabled for the site, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

1. Select the **User Profile Detail** component in the page you're configuring.
2. To view properties for the component, select the Properties pane:

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Show Influence Section`	To show the user's reputation scores under their photos, select the box.
`Show user's reputation score in the Influence section`	To show user's reputation scores in the Influence section, select the box. Otherwise, the user's reputations scores under their photos.
`Show Knows About`	Determines if the Knowledgeable About list is shown.
`Show Photo`	To show the user's photo, select the box.
`Display circular photo`	To apply a circular crop to user profile photos, select the box. Otherwise the crop is a square/rectangle. Users may must reload their photos so that they fit inside in the cropped area.
`Maximum Topics Displayed`	Enter the maximum number of topics listed for each user, up to a limit of 10.

Example: Sample User Profile Detail component:



By default, all the information in a user's profile is visible to all users in the site, including to unlicensed guest users accessing the site. To limit access to members' information, use a custom user profile page layout. Hide fields that reveal sensitive information, such as phone, email, title, and manager.

Note: Showing many user fields in a custom layout affects the performance of the profile view. We recommend showing no more than 8 fields.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see Salesforce Help.

Add Actions to Your User Profile

There are five available actions that can be added to a User Profile component in your site. These actions include: Freeze, Follow, Edit, Message, and Give Badge.

Note: Only the Follow action is turned on by default.

To modify your user profile actions in Lightning Experience:

1. Access the Salesforce Setup menu.
2. Go to **Object Manager** and select **Users**.
3. Click **User Page Layouts**.
4. On the **Mobile and Lightning Actions** tab, choose which buttons to display by dragging them into the **Salesforce Mobile and Lightning Experience Actions** section.
5. Save your layout.

Actions appear in a dropdown on the User Profile component and are displayed in the order you add them to the layout.

User Profile Image

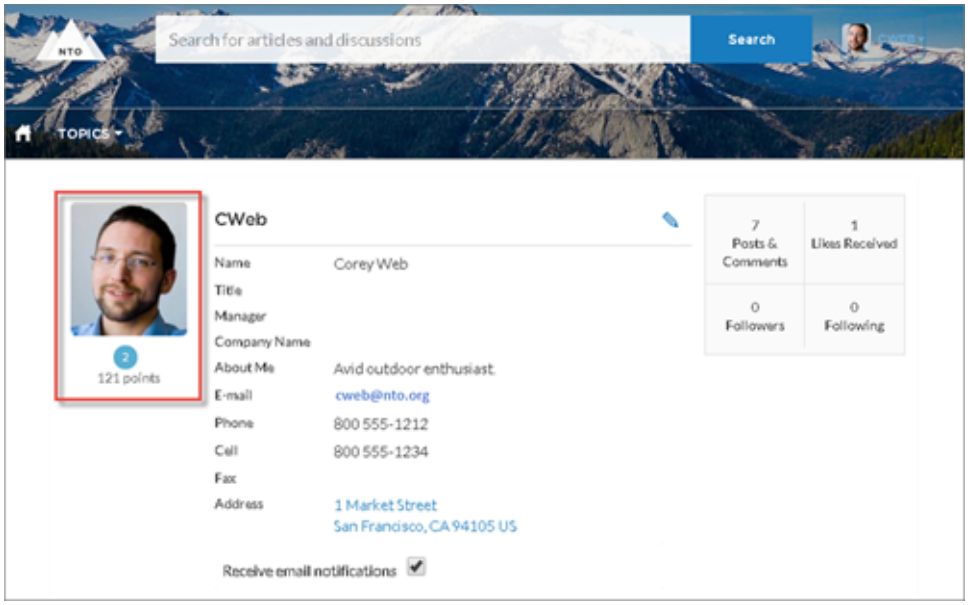
The User Profile Image component displays the user's reputation level, reputation points, and profile photo.

Note: The User Profile Image and the User Profile Summary components replace the User Profile Summary & Image component, which was deprecated in Winter '21.

1. Select the **User Profile Image** component in the page you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.
`Display circular photo`	To apply a circular crop to user profile photos, select the box. Otherwise the crop is a square/rectangle. Users must reload their photos so they fit in the cropped area.
`Display Reputation`	To display the reputation level below the user profile photo, select the box.

Example: Sample User Profile Image component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Knows About

Allow site members to endorse and recognize experts using the widget directly on a member's profile page.

After you have enabled Knowledgeable People, site members can endorse one another for both new and existing topics on their site's user profile page. The profile page displays all the topics the site member is knowledgeable about.

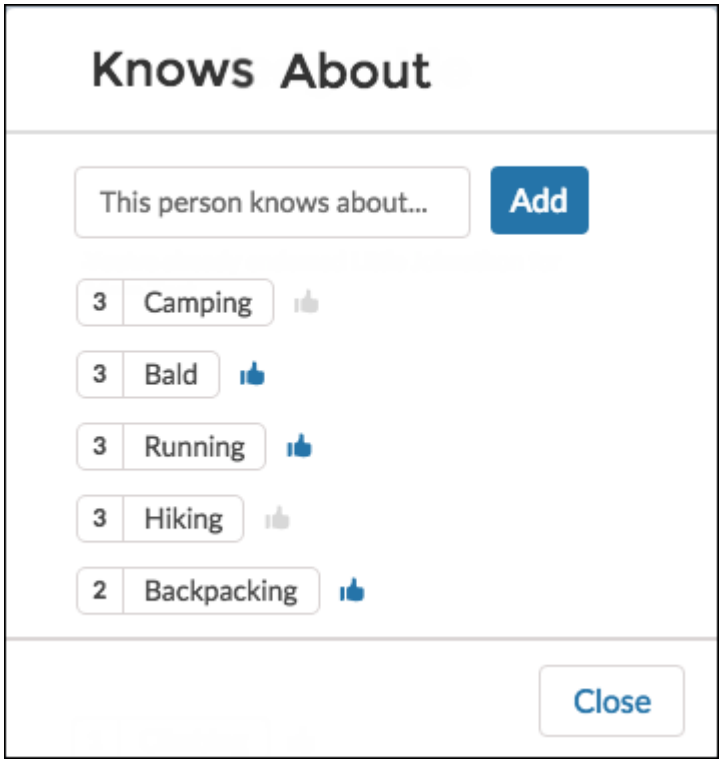
Use the component to enter a new topic for endorsement. You can also view the number of endorsements that have been received for each topic that a member has been marked knowledgeable about. To add or remove endorsements, members can click the thumbs up button. Site members aren't able to endorse themselves on any topic.

1. Do one of the following:
   - To display the Knows About list within the User Profile component, select that component.
   - To display the list elsewhere on the profile page, drag the User Profile Knows About component to the desired location.
2. In the property editor, configure the properties for the component.

Property	Details
`User ID`	The user profile ID. Typically, this field is automatically populated with the record ID when the page loads.
`Title`	Enter a title for the component. The default text is `Knows About`.
`Maximum Topics Displayed`	Enter the maximum number of topics listed for each user, up to a limit of 10.

Note: Site members can't opt out of being shown as knowledgeable about specific topics.

Example:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Related List

The User Profile Related List component shows lists of a user's files, groups, followers, and who they're following.

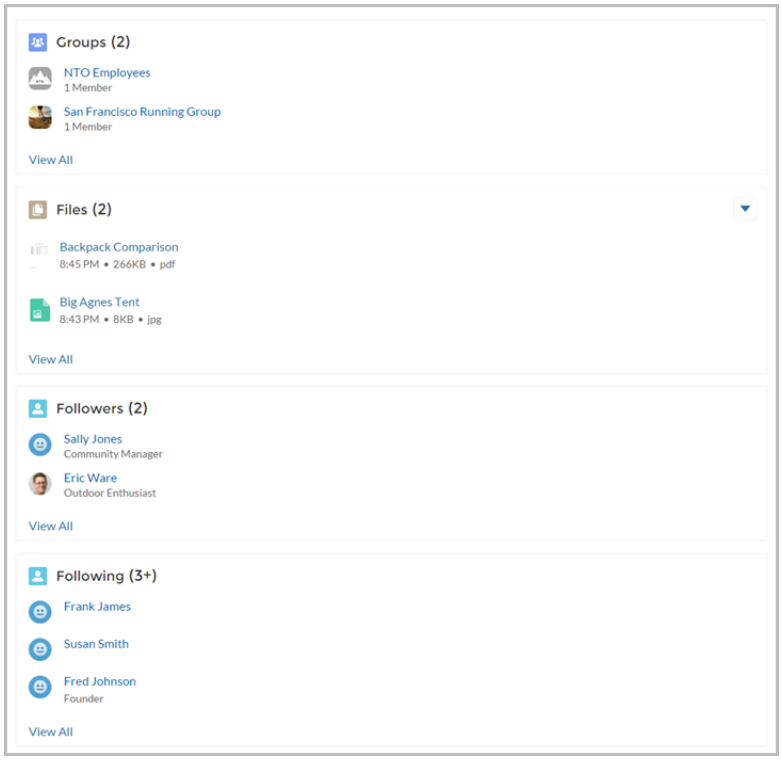
Add the User Profile Related List component to the User Profile page to show a user's related lists. Users can view full details for a related list by clicking **View All** at the bottom of the list. On the Files related list, users can click to upload a file.

You can customize which related lists are visible in your site by editing the User Profile page layout.

1. Select the **User Profile Related List** component.
2. In the property editor, configure the properties for the component.

Property	Details
`User ID`	The system supplies this value. Don't update this field.

Example: Sample User Profile Related List component



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Menu

The User Profile Menu component displays a user's name (or nickname) and profile picture. It also displays a dropdown from which users can navigate to their profile, open a case, access their locale and email notification settings, and log out. External users can also access and manage their account. If the user isn't logged in, a Login button appears in the header.

Note: The User Profile Menu component replaces the Profile Header component in sites based on Winter '18 and later versions of Experience Builder templates.

Each template comes with its own default user profile menu, which can be customized as needed. For example, for the B2B Store template, the link that buyers click to view their account record shows account information on the My Account page. All other templates display external user account information in the generic Record Detail page.

Users can't customize the profile photo functionality in the profile menu. Instead, they edit all profile information from the profile details page.

Note: If displaying a nickname is enabled in the site, this component shows the nickname instead of the user's name. The user's reputation level displays only if reputation is enabled in the site.

1. In the page you're configuring, select the **User Profile Menu** component.
2. In the property editor, configure the properties for the component.

Property	Details
`Case Filter Name or IkD`	The name or ID of the list view that displays the user's cases. This value is used throughout the site to display the user's list of cases. By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Include Contact Support`	Select to include the option to contact an agent from the profile.
`Home Label`	Enter the text shown for the link to the site home page from the user navigation menu. The default is Home.
`Include My Messages`	Include a **My Messages** link in the profile menu, which shows the number of unread messages in the menu and opens the Messages page when clicked.
`My Profile Label`	Enter the text shown to indicate a user's profile. The default is My Profile.
`Contact Support Label`	Enter the text for the link to the page where the user can open a case. The default is Contact Support.
`Login Label`	Enter the text for the link to log in to the site. The default is Login.
`Logout Label`	Enter the text for the link to log out from the site. The default is Log Out.
`Experience Builder Label`	Enter the text for the link to the Experience Builder page. The default is *`Experience Builder`*. This link appears only for users with permissions to manage the site.
`Site Setup Label`	Enter the text for the link to the setup page for sites. The default is Site Setup. This link is shown to users with permissions to create or modify the site's administration settings.
`User Settings Label`	Enter the text for the link to access an authenticated user's personal settings for the site. The default is My Settings.
`Show User Settings in Menu`	Select this option to show user settings in the profile dropdown list.
`My Account Label`	Enter the text for the link that external users click to view their account record. The default is My Account. This feature is available in the Spring '16 version of the Customer Service template and later. External site members who access the My Account link see their account details based on the configuration of the Record Detail page.

User Profile Stats

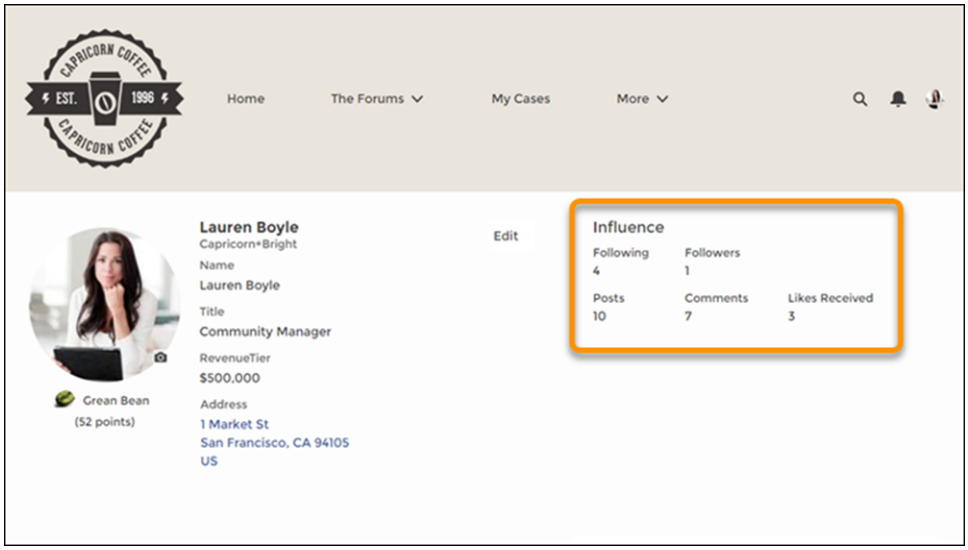
The User Profile Stats component displays many of the user's Chatter statistics for the community. Stats include the number of posts and comments made, likes received, followers, and people they're following.

The user statistics that appear in the User Profile Stats component are visible to all members of the community. This visibility lets community members see how active other members are.

1. Select the **User Profile Stats** component on the page.
2. In the property editor, configure the properties for the component.

Property	Details
`User ID`	Don't update this field. The system supplies this value.
`User Stats Title`	Title of the component. The default value is *`Influence`*.
`Display Reputation`	To display the reputation level, check the box.

Example: Sample User Profile Stats component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Summary

The User Profile Summary component displays the user's contact information, title, address, and manager's name. If nickname display is enabled for the site, other users' nicknames are shown in place of the full name. The full name is shown when users view their own profiles.

Note: The User Profile Summary and the User Profile Image components replace the User Profile Summary & Image component, which was deprecated in Winter '21.

By default, all the information in a user's profile is visible to all users in the site, including to unlicensed guest users accessing the site. To limit access to members' information, use a custom user profile page layout. Hide fields that reveal sensitive information, such as phone, email, title, and manager.

Note: Showing many user fields in a custom layout affects the performance of the profile view. We recommend showing no more than 8 fields.

Similarly, consider modifying the fields for unlicensed guest user profiles to show only the necessary information. For example, you could hide the manager field. For detailed instructions on customizing page layouts, see Salesforce Help.

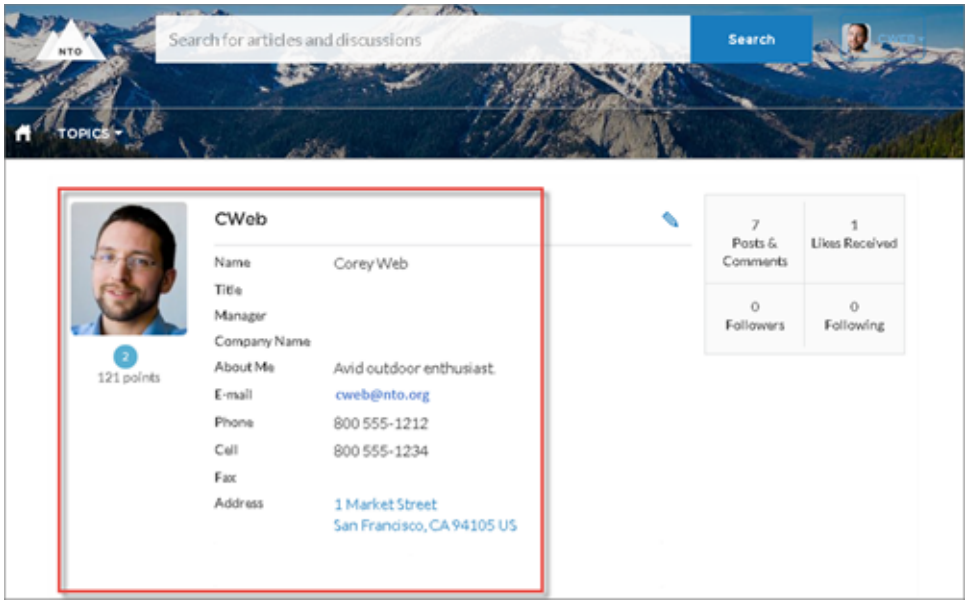
You can add the User Profile Summary component to the Profile page. This component allows users to edit their profile information from the site. When viewing another user's profile, you can click their address to see a Google map of their location.

Note: When viewing a site on a mobile device, the Google map appears below the address.

1. Select the **User Profile Summary** component in the page you're configuring.
2. To view properties for the component, select the Properties pane:

Property	Details
`User ID`	The system supplies this value so that authenticated users can view their own information. Don't update this field.

Example: Sample User Profile Summary component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

User Profile Tabs

The User Profile Tabs component lets users see their feed and cases on their profile. They can also post to their feed directly from their profile. When viewing another user's profile, they see the user's activity but not their cases.

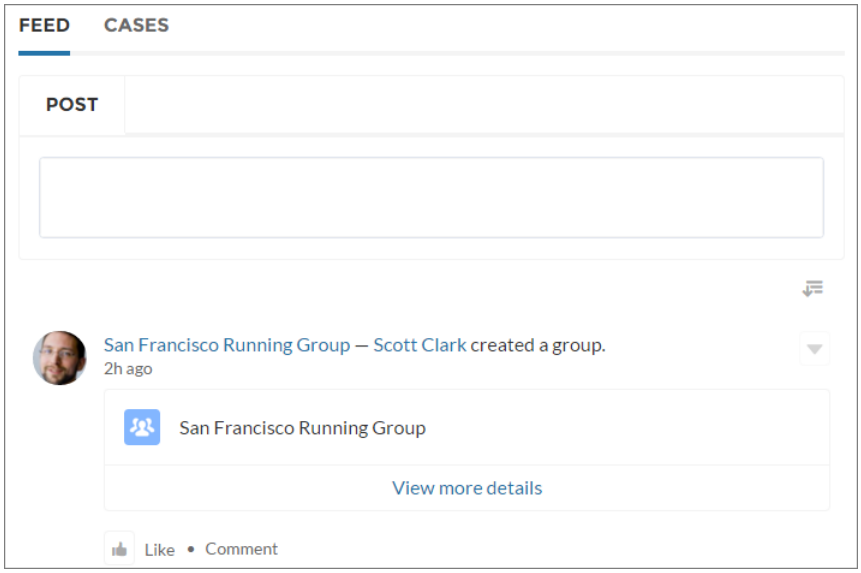
On desktops and tablets, users see a list view of up to 25 of their most recent cases. They can sort columns in the list and click the case number to view the details of that case. Navigation arrows let them click through the list of cases when there are multiple pages. On mobile devices, the view is optimized and users scroll through a list of cases and select a case to see its details.

1. Select the **User Profile Tabs** component in the page you're configuring.

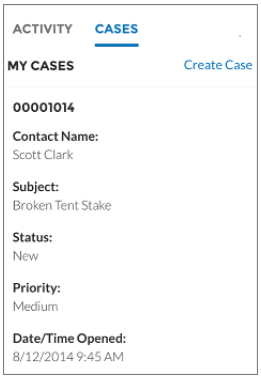
2. In the property editor, configure the properties for the component:

Property	Details
`User ID`	The system supplies this value. Don't update this field.
`Feed Tab Label`	Enter the text you want to display on the tab that users select to view a user's Chatter feed. The default text is *`Feed`*.
`Cases Tab Label`	Enter the text you want to display on the tab that users select to view their cases. This only displays for users on their own profile. The default text is *`Cases`*.
`Case Filter Name or ID`	Enter the name of the list view that displays cases. By default, the template uses the AllOpenCases view, which lets users view any open cases that they have permission to see. Configure sharing to ensure that users see only cases that belong to them. Alternatively, you can use another pre-defined list view or create a custom list view.
`Header Title`	Enter the text for the label that appears at the top of the list of cases. The default for this field is `My Cases`.
`Create Case Label`	Enter the text you want to display on the button that users can click to create a case. The default text is `Create Case`.
`Show All Updates as the Default Feeds Filter`	When this box is selected, the feed automatically defaults to the All Feeds filter. If it isn't selected, the feed defaults to the Posts Created by this User filter.

Example: Sample User Profile Tabs component:



Case list viewed on a mobile device:



SEE ALSO:

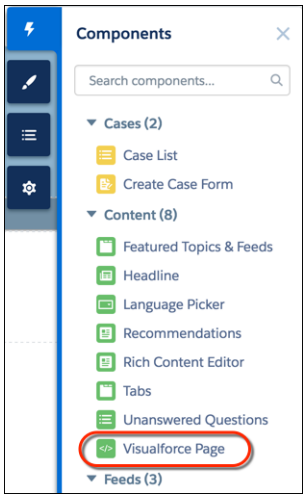
Which Components Can I Use with Each Aura Template?

Visualforce Page Component

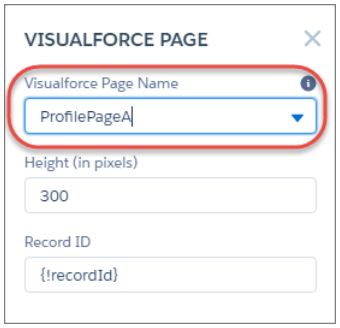
Use the Visualforce Page component to add existing Visualforce pages to the pages of your Experience Builder site.

Note: The Visualforce Page component only supports the `navigateToURL` function. Relative and absolute URLs are supported. Relative URLs are relative to the site domain, and retain navigation history. External URLs—that is, URLs that are outside the site domain—open in a separate browser window.

1. In Experience Builder, drag the Visualforce Page component from the Components panel onto the page.



2. Edit the component to select the Visualforce page to use. If you installed the Salesforce CPQ (Steelbrick) app, those pages are also available for selection here.



3. Adjust the height as you like.
4. Optionally, specify a Record ID if the Visualforce page. Typically, the system populates this value depending on context.

Tip: If the Visualforce page requires the Record ID from an object such as Account, create object pages for Account. Then drag the Visualforce Page component onto the object's detail page. The Record ID field adjusts to the object's ID.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

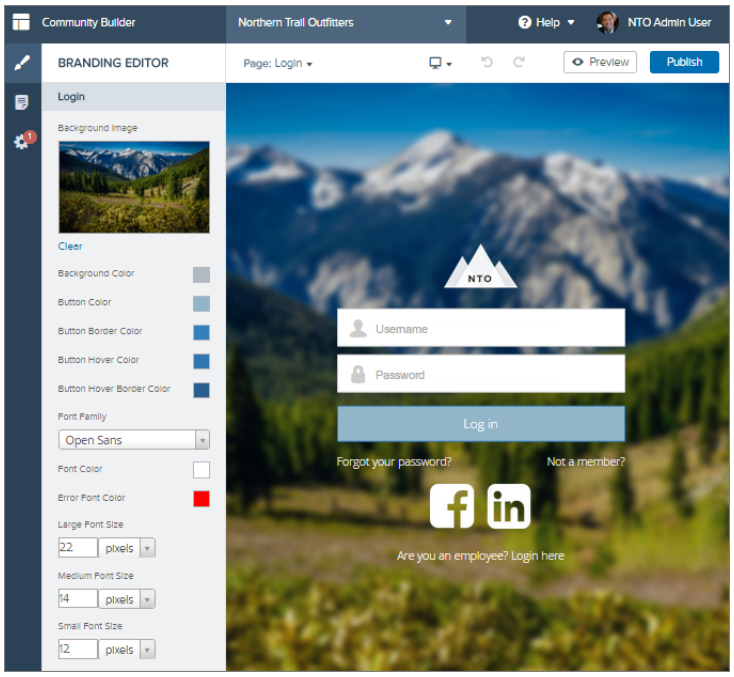
Login Components

Brand the Login Pages

Use the Experience Builder to customize and brand the login pages with your own design. You can change the appearance of the login pages with a background image, color scheme, and font settings. Use Experience Builder to set the background. Your preference applies to all login pages unless you override the settings within an individual page.

1. Select **Go To Experience Builder**, if you're not already in it.
2. From the Go To menu, select **Login**.
3. In the left pane, upload an image for the background, and then set color and text preferences as needed.

Example: The Branding Editor settings in Experience Builder:



Warning: When you customize a login page or any page that includes fields with sensitive or confidential information with Experience Builder, we recommend that you use only standard components built by Salesforce or components that you built, customized, or vetted. Use of third-party components and code libraries on a page that includes fields with sensitive or confidential information can increase your risk for security vulnerabilities.

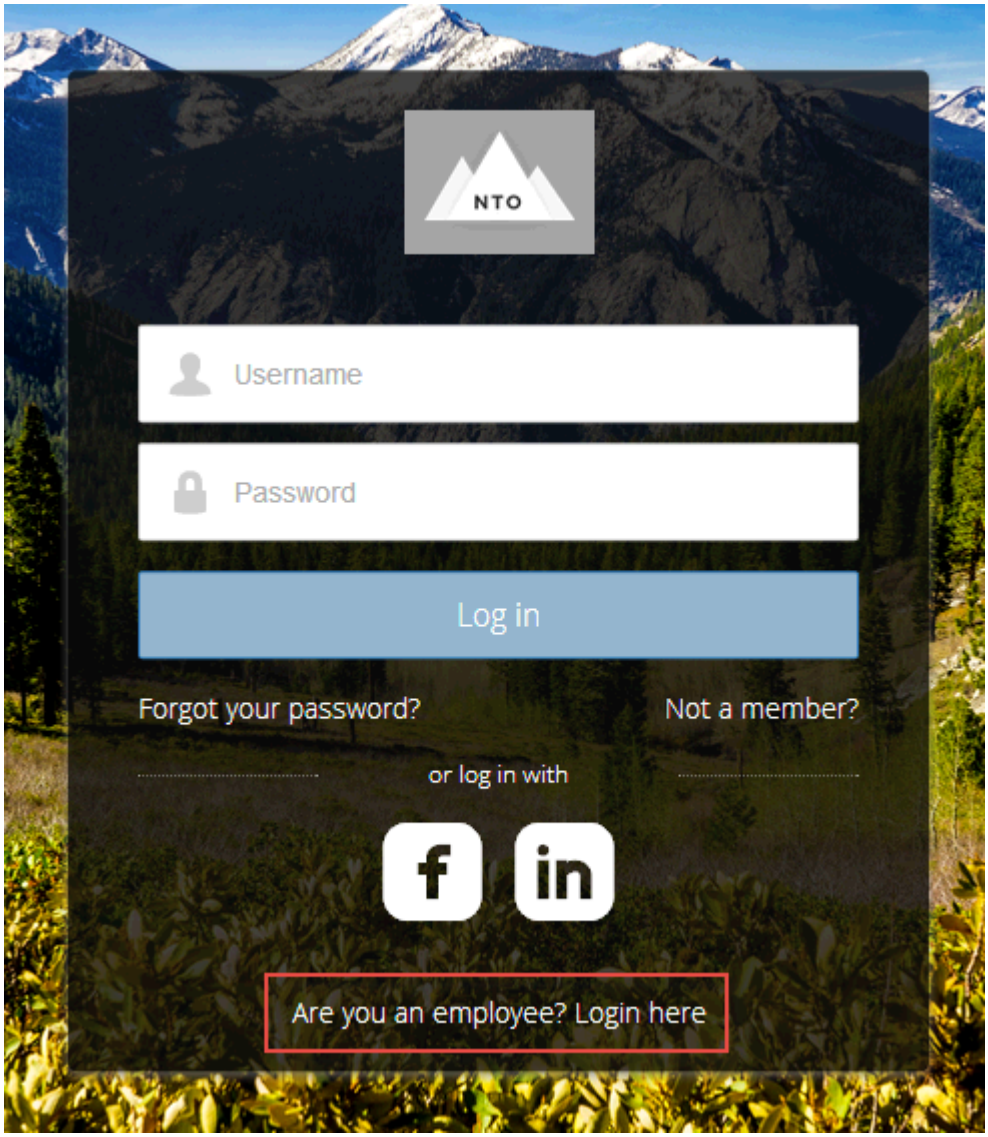
Employee Login Link

Use the Employee Login Link component to direct users with accounts in the site's parent org to their login page. When your employees or other users who have accounts in the parent org for the site end up on the site login page, you can redirect them to their own login page with a link. They can then log in with all the settings and permissions of their org account.

1. Select the **Employee Login Link** component in the page that you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Employee Login Link`	Enter text that identifies the login option for employees. The label appears as clickable text on the page. The default text is *`Are you an employee? Login here`*.

Example: Sample Employee Login Link component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Forgot Password

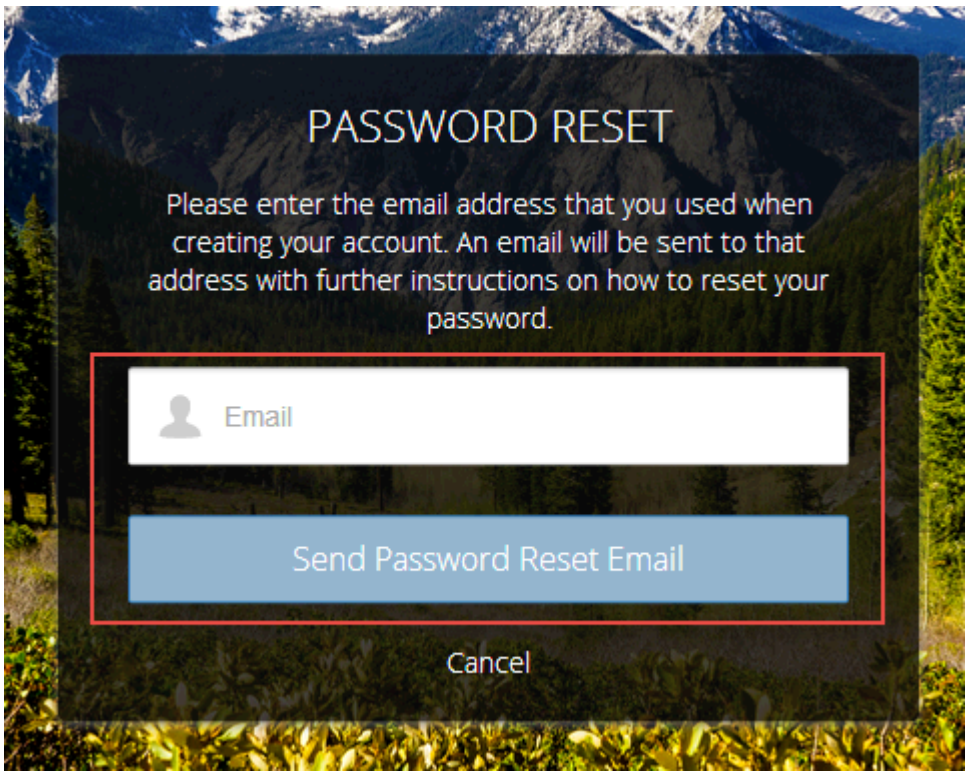
Use the Forgot Password component to let users request a new password.

Sometimes users forget their existing passwords and need a new one. The Forgot Password component gives users the ability to get one without contacting an administrator. The user enters the email address that's associated with the account, clicks the button, and gets email instructions for resetting the password.

1. Select the **Forgot Password** component in the page that you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Check Email URL`	Enter the view or path to the page that notifies the user when the password has been reset and an email has been sent.
`Username Label`	Enter the text that appears in the field where the user enters a valid username, which can be in the form of an email address if users are identified that way.
`Submit Button Label`	Enter the text for the button that the user clicks to make the password reset request.

Example: Sample Forgot Password component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Login Form

Let users log in with login fields for a username and password and a button for submitting both.

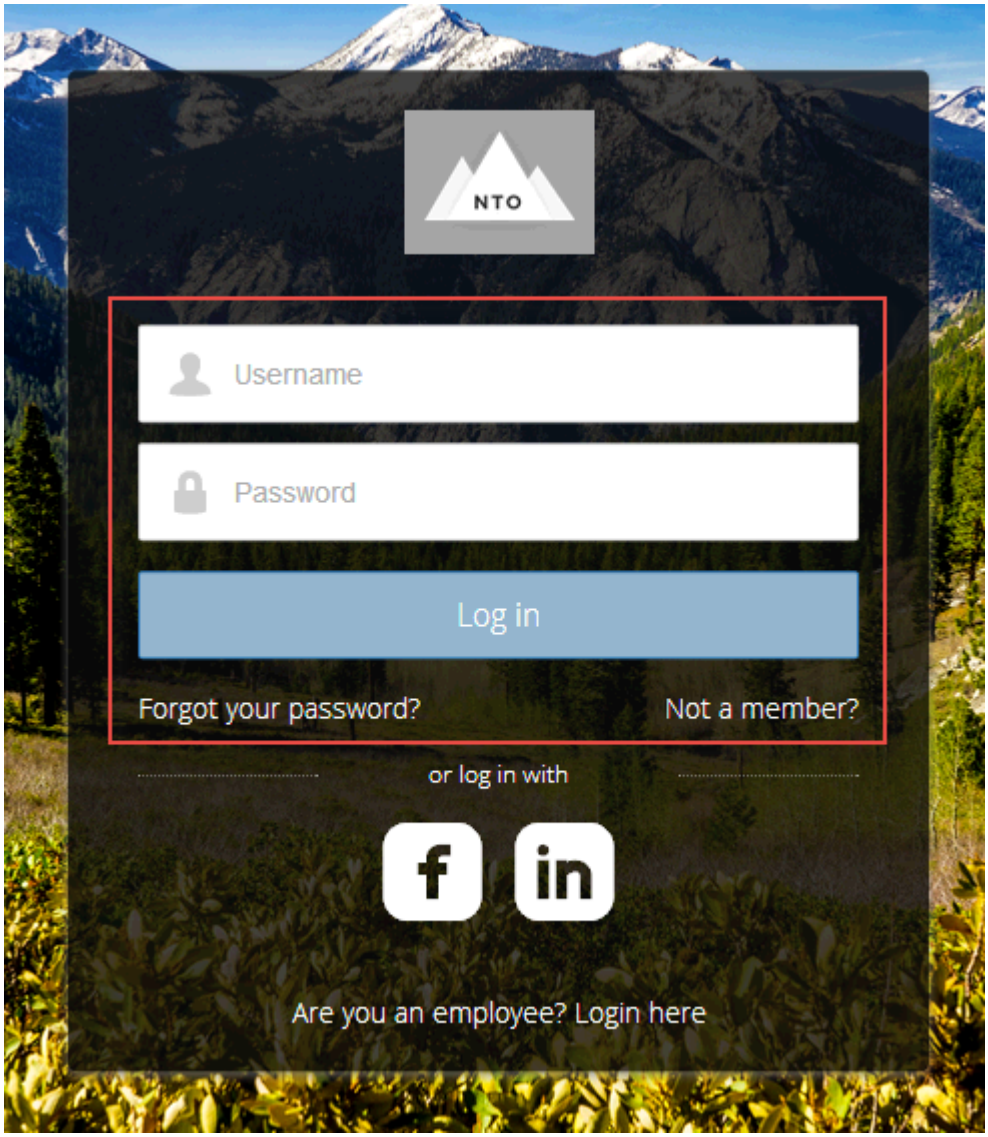
The **Login Form** component is a simple username and password form that lets users with an existing account log in to the site.

Note: If the site administrator deselects the username and password checkbox on the **Administration** > **Login & Registration** page in Experience Management, the Login Form doesn't appear in the published site. For more information, see "Customize Your Experience Cloud Site's Login Experience" in Salesforce Help.

1. Select the **Login Form** component in the page that you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Start URL`	Enter the path to the page that users see after they log in successfully. This page is the home page for the site.
`Username Label`	Enter the text for the username field label. The default text is **Username**.
`Password Label`	Enter the text for the password field label. The default text is **Password**.
`Login Button Label`	Enter the text for the button that the user clicks to submit the login request. The default text is **Log in**.
`Forgot Password Link Label`	Enter the text for the link to the page where users can request a password reset. The default text is **Forgot your password?**
`Forgot Password URL`	Enter the page where users can request a password reset.
`Self Register Link Label`	Enter the text for the link to the page where users can complete a self-registration form. The default text is **Not a member?**
`Self Register URL`	Enter the page where users can complete a self-registration form.

Example: Sample Login Form component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Self-Registration

The Self-Registration component lets users set up their accounts so that you don't have to add each one manually. Users put their information into the form fields, and when they click **Sign Up**, an account is created for them. This component has a basic set of fields that you can customize, and you can add more fields.

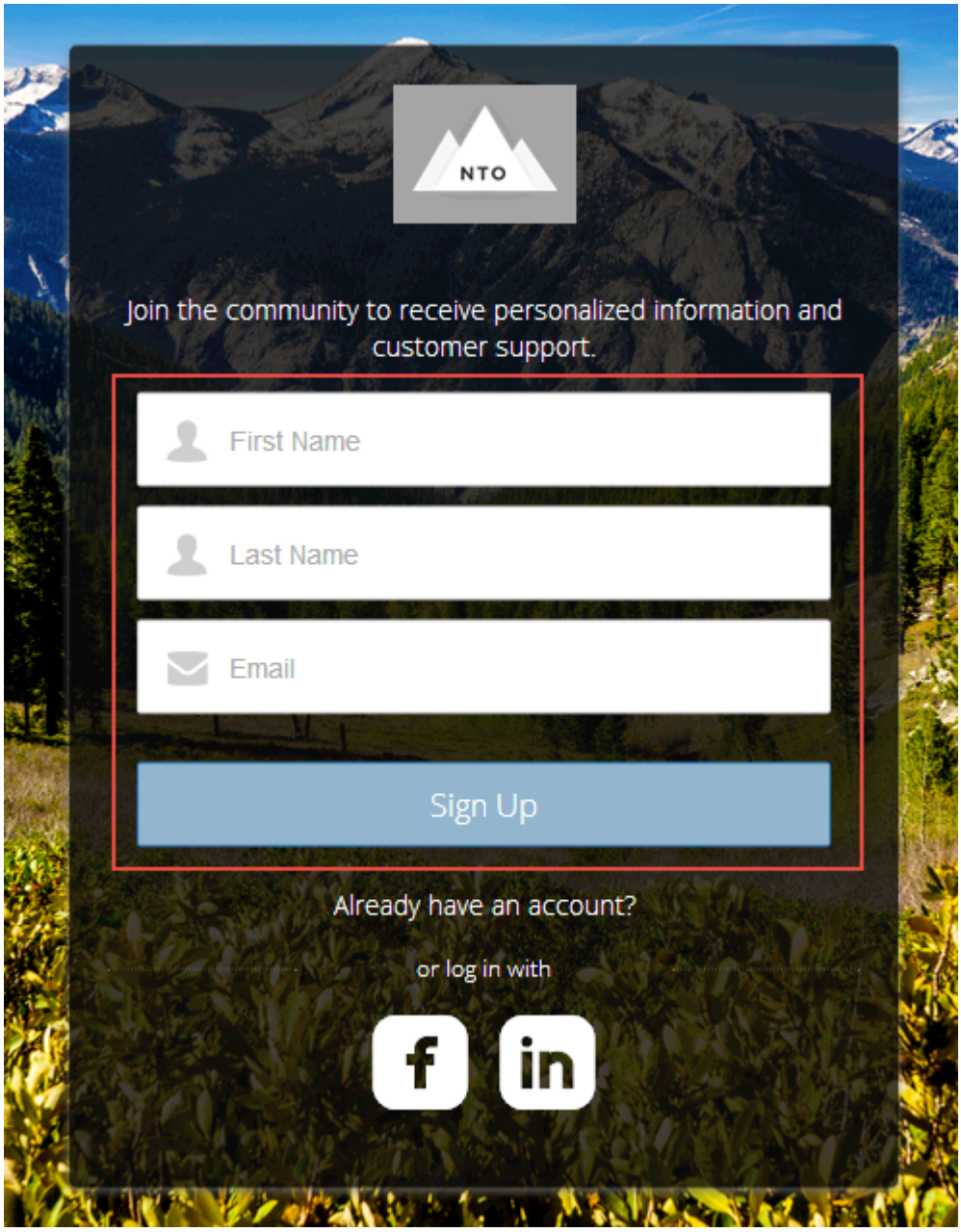
For this component to appear, go to Experience Management and select **Administration** > **Login & Registration** > **Allow external users to self-register**.

1. Select the **Self Registration** component in the page that you're configuring.

2. In the property editor, configure the properties for the component.

Property	Details
`Account ID`	Enter the variable expression for the account ID to associate with new users.
`Start URL`	Enter the path to the page that users see after they log in. This page is the home page for the site.
`Registration Confirmation URL`	Enter the path to the page to display after the user submits the self-registration form.
`First Name Label`	Enter the label text for the user's first name. The default text is **First Name**.
`Last Name Label`	Enter the label text for the user's last name. The default text is **Last Name.**
`Email Label`	Enter the label text for the user's email address. The default text is **Email**.
`Password Label`	Enter the text for the password field label. The default text is **Confirm Password**.
`Confirm Password Label`	Enter the text for the field in which a user confirms the password. This field usually requests the user to retype the proposed password to make sure that it's correct.
`Submit Button Label`	Enter the text for the button to submit the form values. The default text is **Sign Up.**
`Include Password Field?`	Select this option if you want self-registering users to pick their own passwords. Otherwise, password information is provided in the email that they receive after they submit the form.
`Extra Fields Field Set Name`	Optionally, add fields to the form. If you've created a field set by using our API, enter the variable that's associated with the field set here. For example, you can write code that creates a field set to collect a phone number or other information.

Example: Sample Self-Registration component:



SEE ALSO:

Which Components Can I Use with Each Aura Template?

Set Icons for Social Login

The Social Login component provides users with icons that they can click to log in to a third-party account, such as Facebook© or LinkedIn©. Set these icons for each authentication provider that you configure for the org.

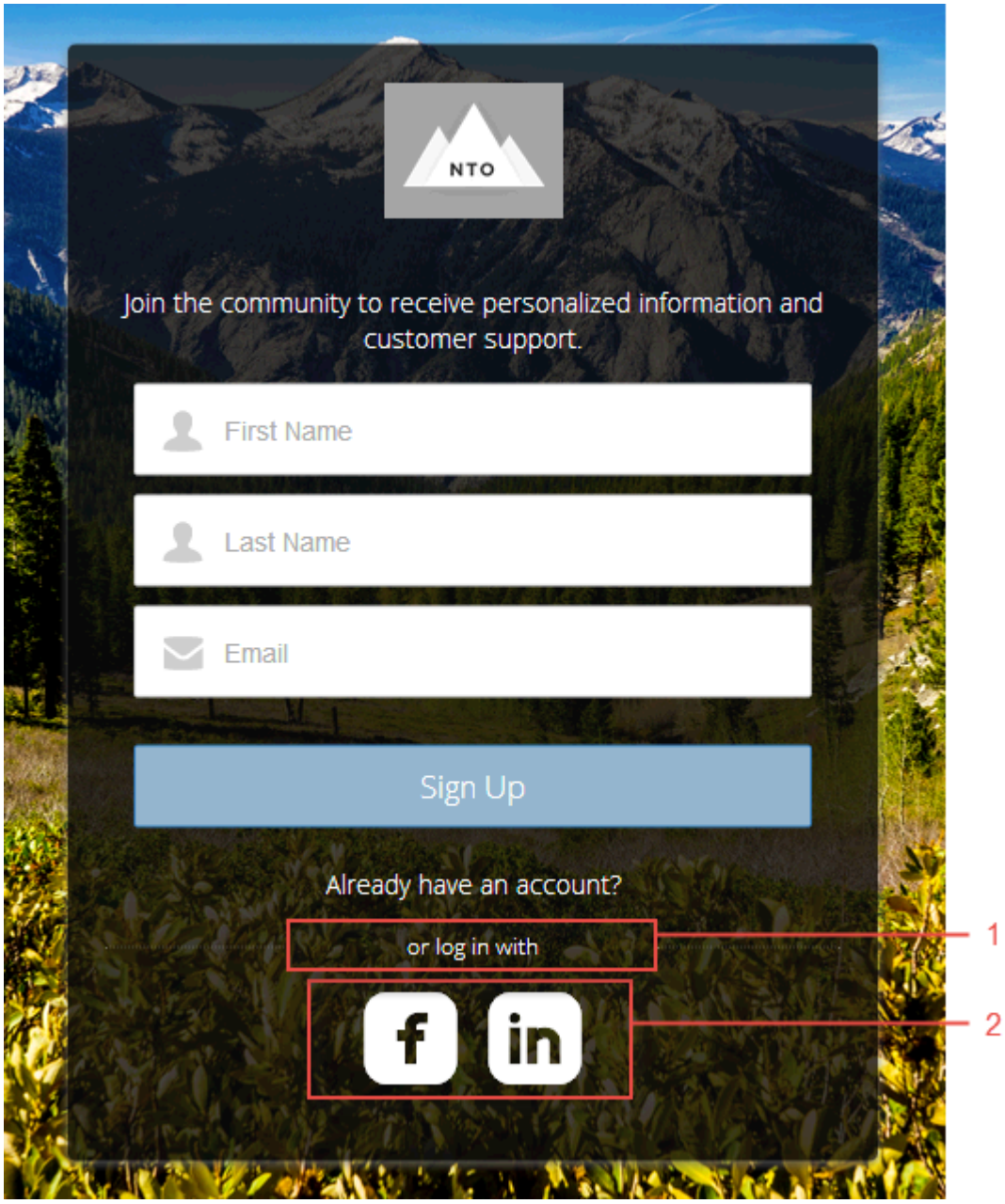
Some users prefer to use an existing account with a service such as Facebook to log in to the site instead of setting up a new account and password. The third-party service is an authentication provider that verifies user identification. Use the Social Login component to add an icon for each supported authentication provider. The user clicks the icon and logs in using the associated account's username and password.

Before you add the Social Login component, set up each authentication provider. For more information, see Authentication Providers.

1. Select the **Social Login** component in the page that you're configuring.
2. In the property editor, configure the properties for the component.

Property	Details
`Show Header`	To show a text header above the authentication header icons, select this option.
`Header Text`	Enter the text for the header text.
`Use Experience Builder site auth provider URLs`	This option is selected by default in new Experience Builder sites and in new Social Login components that you add to existing sites. It improves performance and reduces HTTP redirects by using site-specific URLs for single sign-on (SSO) for all auth providers for your site. Copy the site's callback URL in Auth. Providers in Setup. Update the callback URLs in your identity provider accordingly. When you deselect this option, Salesforce continues to use `login.salesforce.com` or `test.salesforce.com` to redirect to your site during SSO, which can result in decreased performance. If you configure Apple as an external authentication provider, select this option to ensure that the Social Login component recognizes user information.

Example: Sample Social Login component with “or log in with” text (1) and authentication provider icons (2).



SEE ALSO:

Which Components Can I Use with Each Aura Template?

What Is the Enhanced Sites and Content Platform?

The enhanced sites and content platform is a flexible new system that brings together Salesforce CMS and LWR sites. From Winter '23, enhanced LWR sites and enhanced CMS workspaces that you create are hosted together on a redesigned platform that offers partial deployment, site content search, and easy content management.

Note: To clarify which features apply where, we use the terms *enhanced LWR sites* and *enhanced CMS workspaces* to refer to LWR sites and CMS workspaces on the new platform.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

What Are Enhanced LWR Sites?

Enhanced LWR sites can employ partial deployment so you can choose which site elements are ready to go live. With site content search, your users can find content contained in Rich Content Editor and HTML Editor components. And because everything runs together on our consolidated platform, site search results can include content that you share from an enhanced CMS workspace.

Take advantage of these additional features, which are available only in enhanced LWR sites.

- Enable site content search.
- Add expression-based visibility to site components.
- Deploy partial site content with change sets.
- Programmatically deploy partial site content with the DigitalExperienceBundle and DigitalExperienceConfig Metadata API types.
- Add Google Analytics 4 to your site.

What Are Enhanced CMS Workspaces?

With enhanced CMS workspaces, you can create and publish content more easily in a simplified user interface. Create translated content variants and manual collections to help put the right content in front of the right audience. And add extensions for spell checkers and other productivity-enhancing tools to the sidebar in the CMS content editor.

Because new LWR sites and workspaces are hosted together on the same platform, you can share content from an enhanced CMS workspace with an enhanced LWR site. You can also share content from a non-enhanced CMS workspace with an enhanced LWR site.

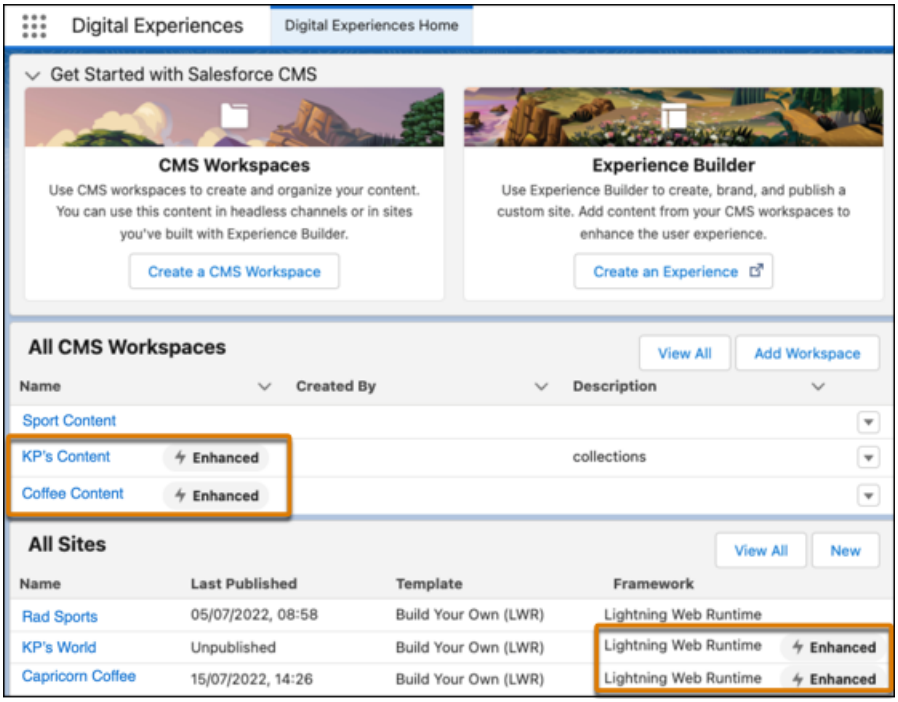
If you have an...	You can access CMS content shared from...
Enhanced LWR site	An enhanced CMS workspace or a CMS workspace
LWR site	A CMS workspace
Aura site	A CMS workspace

How Do I Start Using the New Platform?

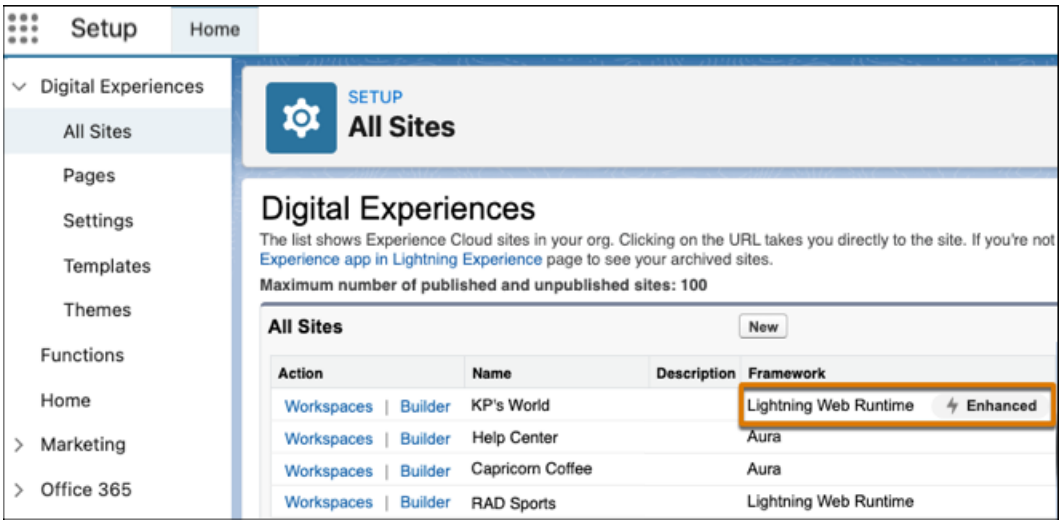
From Winter '23, the enhanced sites and content platform is automatically enabled. So any new LWR sites that you create using the Microsite (LWR) or the Build Your Own (LWR) templates are hosted on this new platform. Similarly, any enhanced CMS workspaces that you create run on the redesigned system. Existing CMS workspaces and LWR sites are unaffected by this change and can't access the platform's features.

How Can I Tell When a Site or Workspace Is Enhanced?

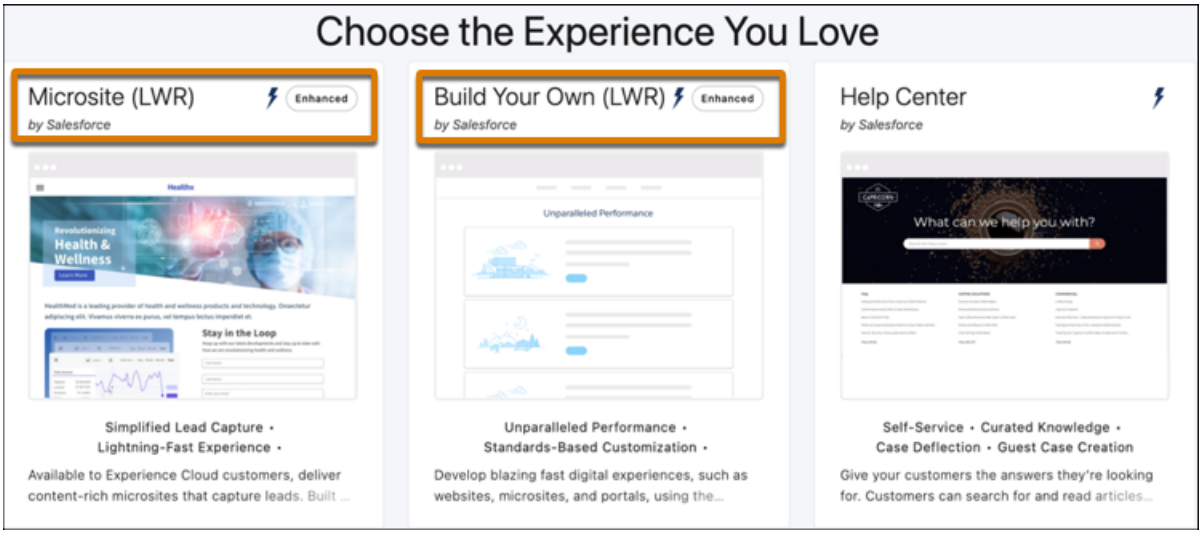
In the Digital Experiences app, you can see an Enhanced badge beside workspaces and sites that are hosted on the new platform.



Similarly, we added this information to the list of sites in Setup under Digital Experiences.



And when you create a Microsite or Build Your Own (LWR) site, you can see that they're being created on the enhanced sites and content platform.


Choose the Experience You Love
Microsite (LWR)
Enhanced
by Salesforce
Simplified Lead Capture •
Lightning-Fast Experience •
Available to Experience Cloud customers, deliver content-rich microsites that capture leads. Built ...
Build Your Own (LWR)
Enhanced
by Salesforce
Unparalleled Performance
Unparalleled Performance •
Standards-Based Customization •
Develop blazing fast digital experiences, such as websites, microsites, and portals, using the...
Help Center
by Salesforce
What can we help you with?
Self-Service • Curated Knowledge •
Case Deflection • Guest Case Creation
Give your customers the answers they're looking for. Customers can search for and read articles...

Create an Experience Cloud Site

Create an Experience Cloud site using a wizard that helps you choose a template that meets your business needs.

To see the number of sites you can create for your org, from Setup, enter `Digital Experiences` in the Quick Find box, and select **Sites**. The maximum number of sites appears at the top of the page.

1. To create a site, from Setup, enter `Digital Experiences` in the Quick Find box, select **All Sites**, and then click **New**.
   The creation wizard opens with several templates for you to choose from.
2. To see more information about a template, select it.
   - Customer Account Portal—A private and secure place for customers to access and update their account information. Improve customer relationships and decrease service costs by letting customers work in the portal. Customers can see and pay invoices, update their account information, and search your knowledge base for answers to their most frequent questions.
   - Partner Central—A flexible, responsive template designed for channel sales workflows. Recruit, build, and grow your partner network to drive channel sales and marketing together in a branded online space. Easily configure lead distribution, deal registration, and marketing campaigns. Share training materials and sales collateral in a central space, and use reports to track your pipeline.
   - Customer Service—A powerful, responsive self-service template with multiple prebuilt theme options. The Customer Service template lets users post questions to the community, search for and view articles, collaborate, and contact support agents by creating cases. Supports Knowledge, Chatter Questions, and cases.
   - Help Center—A public-access, self-service community that exposes the articles that you make available from your knowledge base. You reduce the load on your customer support team, and your users get the satisfaction of finding their own solutions.
   - Build Your Own (Aura)—Provides the basic pages that every Experience Builder site needs: Home, Create Record, Error, Record Detail, Record List, Related Record List, Search, Check Password, Forgot Password, Login, Login Error, and Register. Add more pages and components as needed for the experience you're building. To refine the look of your site, customize your branding and themes.
   - Build Your Own (LWR)—Powered by the Lightning Web Runtime (LWR) framework, this customizable template delivers unparalleled page performance and improves developer productivity. Quickly build pixel-perfect pages and develop Lightning web components and themes that match your unique brand.

     Suitable for developers, consulting partners, and ISVs who are familiar with developing custom Lightning web components, and working with Salesforce DX, User Interface API, and Apex. See the LWR Sites for Experience Cloud guide.
   - Microsites (LWR)—Use the power of LWR to create beautiful, high-performance sites perfect for event pages, landing pages, or other special purpose websites. Microsites gives you all the tools to quickly spin up a website and then archive it when it's no longer needed.

     Suitable for developers, consulting partners, and ISVs who are familiar with developing custom Lightning web components, and working with Salesforce DX, User Interface API, and Apex. See the LWR Sites for Experience Cloud guide.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

- Aloha—A configurable App Launcher template that lets users quickly find applications and access them using single sign-on authentication, including social logins.
- Salesforce Tabs + Visualforce—Standard Salesforce structure and tabs that you can customize using Visualforce. Requires developer experience and advanced setup skills. Offers full platform access with a flexible configuration and supports most standard objects, custom objects, and the Salesforce mobile app.

  Salesforce Tabs + Visualforce isn't a Lightning-based template and therefore doesn't work with Experience Builder.

3. Select the template that you want to use.
4. Read the template description and key features, and click **Get Started**.
5. Enter a name.
6. For URL, enter the name of your site.

   This name is appended to the domain that you created when you enabled digital experiences for this org. For example, if your domain name is `UniversalTelco.my.site.com` and you're creating a customer community, you can enter *`customers`* to create the unique URL `UniversalTelco.my.site.com/customers`.

   Note: You can create one site that doesn't have a custom URL.

   You can change your site name and URL after the site is activated, but users aren't redirected to the new URL. So be sure to inform your members before changing the name or URL.

7. Click **Create**.
   The site is created in Preview status. Now you're ready to build and customize or manage and moderate your site.

When you create a site, Salesforce supplies default pages for login, self-registration, change password, forgot password, and your home page. These pages are based on which template you use to create your site. You can customize these default pages at any time in the Login & Registration page of the Administration workspace.

Important: After you create a site, your profile is added to the list of profiles that have access to it. Then all users with this profile can log in to the site after it's active. If you don't want all users with your profile to have access to the site, remove the profile, and give yourself access through a different profile or permission set. Then create a profile specifically for your site users.

How Many Experience Cloud Sites Can My Org Have?

You can have up to 100 Experience Cloud sites in your Salesforce org. Active, inactive, and preview sites, including Lightning Platform sites, count against this limit.

SEE ALSO:

Experience Cloud

How Many Experience Cloud Sites Can My Org Have?

Edit Pages and Components in Experience Builder

Implementation Guide: Getting Started with the Aloha Community Template for Salesforce Identity

How Many Experience Cloud Sites Can My Org Have?

You can have up to 100 Experience Cloud sites in your Salesforce org. Active, inactive, and preview sites, including Lightning Platform sites, count against this limit.

To see this limit in your org, from Setup enter *Digital Experiences* in the Quick Find box, then select **All Sites**. The Maximum number of sites (including active, inactive, and preview) field displays 100. Archived sites don't count against this limit.

SEE ALSO:

Create an Experience Cloud Site

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Customize Sites with Experience Builder

Experience Builder lets you easily style your site, create and customize pages, add drag-and-drop components, and deliver personalized experiences to different audiences. Choose a template to quickly start your site, and then style the pages to match your company's branding.

Find Your Way Around Experience Builder

Experience Builder lets you quickly create and style your Aura or LWR site to match your organization's branding.

Role-Based Access in Experience Builder

Use role-based access to control who does what in a community, portal, or site. Assign roles to your contributors with the level of access they need in a specific experience.

Add Style to Your Experience Builder Site with Themes

A theme is a collection of information that defines the visual flow of your Experience Builder site.

Find and Create Asset Files in Experience Builder

Upload and select images for your header, logo, rich content editor, and custom components using the file selector in Experience Builder. After they're uploaded, files are converted to packageable asset files and stored in your org asset library for easy reference and retrieval.

Experience Builder Settings

Use the Settings area to track which template you're using, view your site's status, and customize your template. If you're using the Customer Service template, easily access your navigational and featured topic settings.

Preview Your Experience Builder Site

Before going live, you can preview your Experience Builder site to see how it looks in a desktop browser window or on a mobile device.

Publish Your Experience Builder Site Customizations

Publish your site in Experience Builder to make your branding and component customization updates available to your site's members.

SEE ALSO:

Find Your Way Around Experience Builder

Experience Builder Settings

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Find Your Way Around Experience Builder

Experience Builder lets you quickly create and style your Aura or LWR site to match your organization's branding.

To access Experience Builder:

- From the All Sites page in Setup, click **Builder** next to the site name.
- From the Digital Experiences app, click **Builder** next to the site name.
- From a site, click **Experience Builder** in the profile menu.

Experience Builder is available in all fully supported languages that Salesforce offers. If you change the language in your Salesforce user profile settings to one of these languages, the labels in Experience Builder appear in that language.

Use the Experiences menu (1) to:

- Access various workspaces to manage site analytics, login, registration, reputation, topics, and other settings.
- Navigate to Salesforce Setup.
- View the site after it's published. If your site is unauthenticated, we recommend that you open the site in an incognito or private browser tab. That way, you see exactly what your site visitors see.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

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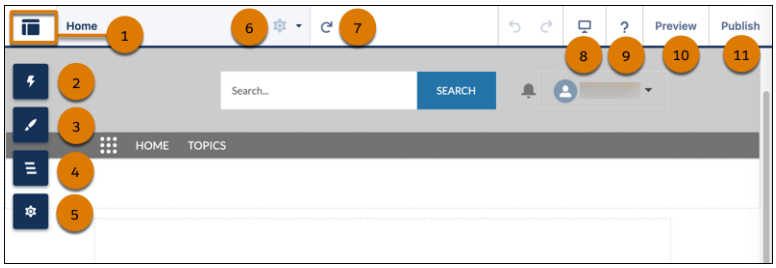
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



In Experience Builder you can also:

- Drag a component from the Components panel onto your page (2). The panel includes standard components and custom ones from AppExchange.
- Theme the site to match your organization's brand and style (3).
- View the page structure and the components on the current page (4). To edit a component's properties, select the component.
- Edit site settings and accept updates to your site's template (5).
- Navigate to the site page that you want to edit on the Pages menu (6). You can also open the Page Settings for any page in this menu to manage, create, delete, or set the visibility of that page.
- Refresh the current page (7).
- See how your site appears on different devices (8).
- Find help and tips (9).
- Preview the site as an authenticated or guest user (10).
- Publish your site updates (11).

SEE ALSO:

Customize Sites with Experience Builder

Experience Builder Settings

Supported Languages

Role-Based Access in Experience Builder

Use role-based access to control who does what in a community, portal, or site. Assign roles to your contributors with the level of access they need in a specific experience.

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Contributors are users in your org that you add to your Experience Builder site. Specify what these contributors can do and see within the site by assigning them one of the following roles.

- Experience admin—These contributors can do just about everything in an assigned Experience Builder site. They can access Experience Builder, can manage contributors, and publish the site.
- Publisher—These contributors help you build and publish the assigned Experience Builder site. They can access Experience Builder and they can publish the site. They can't manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.
- Builder—These contributors help build the assigned Experience Builder site. They can access Experience Builder. They can't publish the site or manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.
- Viewer—These contributors have read-only access to Experience Builder in an assigned site. They can't publish the site or manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.

Note: Contributors assigned any access role level can't:

- Upload images in the Tile Menu component.
- Export templates, pages, or themes within Experience Builder.

Note: To ensure your contributors can access Experience Builder and Experience Workspaces in an inactive site, enable the "Modify All Data" permission.

In addition to the new roles, existing Salesforce admins have broad access to your Experience Builder sites.

- Salesforce admin—A Salesforce admin can control all Experience Cloud settings, and can create communities, portals, and sites.

Add Contributors to an Experience Builder Site

You can add users as contributors to a specific site by assigning them an access role. A contributor's access role is specific to that site, and a contributor can have different access roles in different sites.

Update a Contributor's Access Role

You can update a contributor's access role to increase or decrease the level of access. A contributor's access role is specific to an Experience Builder site, so you must change the contributor's role in each assigned site separately. Experience admins can't change their own role.

Remove a Contributor from an Experience Builder Site

If a contributor leaves your company or is transferred to a different team, you can remove the contributor from a site. The user is removed from the Experience Builder site but not from Salesforce.

Add Contributors to an Experience Builder Site

You can add users as contributors to a specific site by assigning them an access role. A contributor's access role is specific to that site, and a contributor can have different access roles in different sites.

Note:

- Contributors in your Experience Workspace can curate Salesforce CMS content from within each site and decide who sees CMS content and how it appears.
- Users with the Create and Set Up Experiences permission have full edit and publish access to the site, and can't be assigned a contributor role. To add them as contributors, remove the Create and Set Up Experiences permission from their profiles or the permission sets assigned to them.
- If you use a sandbox, keep in mind that CMS workspaces are copied only to Full Copy sandboxes. Even though the Digital Experiences app is available in your Full Copy sandbox, you can't migrate CMS content created in a sandbox to production. If you want to use CMS content beyond testing, we recommend that you create it in production.

1. From your site in Experience Builder, go to **Workspaces** > **Administration**.
2. Select **Contributors** (1) and click **Add Contributors** (2).

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Builder:

- Be a member of the site AND View Setup and Configuration AND Create and Set Up Experiences

To add, remove, or change a contributor access role:

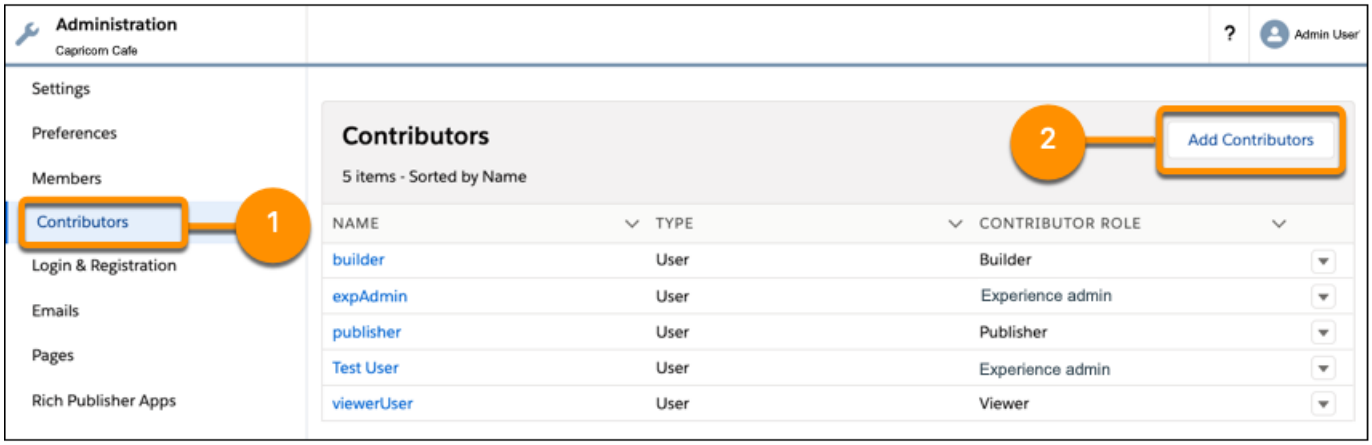
- Be a member of the site AND Create and Set Up Experiences

  OR

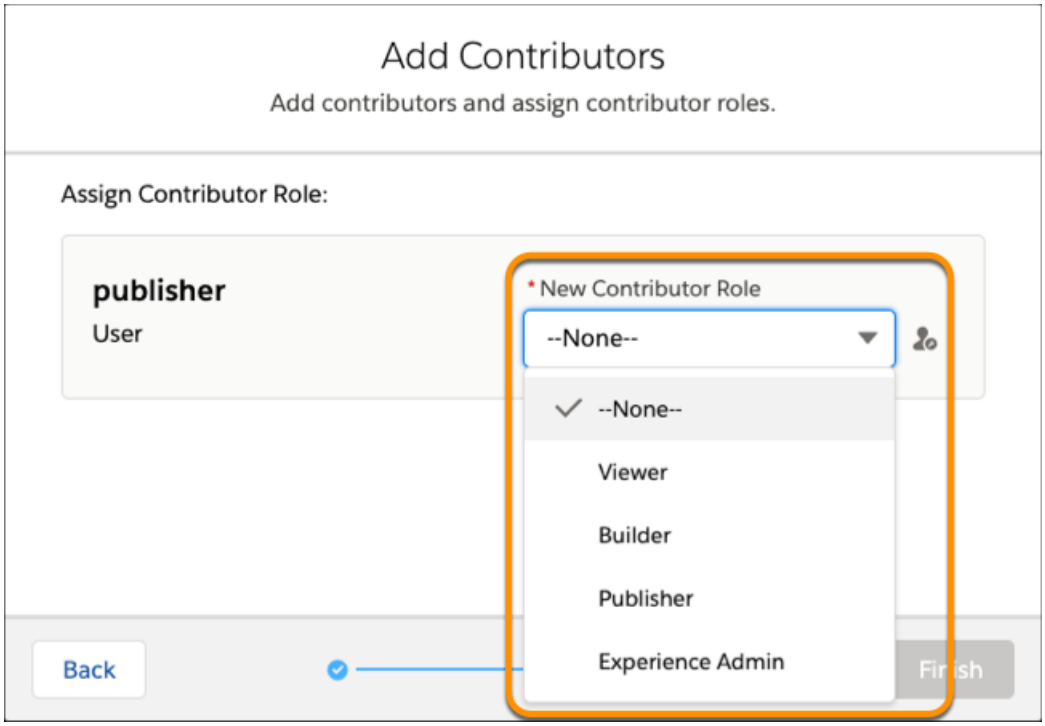
- Be a member of the site AND an experience admin in that site

To be a contributor with a publisher, builder, or viewer role in an Experience Builder site:

- Be a member of the site AND View Setup and Configuration AND Create and Set Up Experiences is disabled



3. Search users by name. Only members of the Experience Builder site on page 72 are listed.
4. Click + next to the users that you want to add.
5. Click **Next**.
6. For each user, assign a contributor role.



- Experience admin—These contributors can do just about everything in an assigned Experience Builder site. They can access Experience Builder, can manage contributors, and publish the site.
- Publisher—These contributors help you build and publish the assigned Experience Builder site. They can access Experience Builder and they can publish the site. They can't manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.

- Builder—These contributors help build the assigned Experience Builder site. They can access Experience Builder. They can't publish the site or manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.
- Viewer—These contributors have read-only access to Experience Builder in an assigned site. They can't publish the site or manage contributors. They have read-only access to the Experience Workspaces **Administration** > **Contributors** tab.

7. Click **Finish**.

Update a Contributor's Access Role

You can update a contributor's access role to increase or decrease the level of access. A contributor's access role is specific to an Experience Builder site, so you must change the contributor's role in each assigned site separately. Experience admins can't change their own role.

1. In your Experience Cloud site, go to Experience Workspaces, and select the **Administration** tile.
2. Select **Contributors**.
3. Click next to the contributor you want to update and select **Change Role**.

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

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To add, remove, or change a contributor access role:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin in that site

To be a contributor with a publisher, builder, or viewer role in an Experience Builder site:

- Be a member of the site AND View Setup and Configuration AND Create and Set Up Experiences is disabled

Note: To prevent you from accidentally removing your access to a site, you can't edit or remove your own contributor role. To change your level of access, another admin must update your role.

4. Select the new contributor role, and click **Update**.

Remove a Contributor from an Experience Builder Site

If a contributor leaves your company or is transferred to a different team, you can remove the contributor from a site. The user is removed from the Experience Builder site but not from Salesforce.

1. In your site, go to Experience Workspaces, and select the **Administration** tile.
2. Click next to the contributor you want to update and select **Remove**.

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience and Salesforce Classic in Enterprise, Essentials, Performance, Unlimited, and Developer editions.

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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To be a contributor with a publisher, builder, or viewer role in an Experience Builder site:

- Be a member of the site AND View Setup and Configuration AND Create and Set Up Experiences is disabled

Note: To prevent you from accidentally removing your access to a site, you can't edit or remove your own contributor role. To change your level of access, another admin must update your role.

After you remove a contributor from a site, the contributor can no longer access that site.

Add Style to Your Experience Builder Site with Themes

A theme is a collection of information that defines the visual flow of your Experience Builder site.

Themes are made up of layouts and styles, such as colors, fonts, and images. These elements combine to give you granular control of the appearance and structure of each page in your site. Themes are all about the look and feel of your site and are independent of your content.

Example: The default Customer Service theme includes two layouts.

- **Login**, which applies the theme layout to the login pages
- **Default**, which applies the theme layout to all non-login pages

Your site comes with several pre-built themes that you can quickly customize to meet your needs. Pre-built themes work across all our standard templates, such as Customer Service, Partner Central, Customer Account Portal, and Build Your Own (Aura). How you style an applied theme is unique to each site where the theme is used. The theme that you select changes the headers, footers, and other properties that are available for your site.

Note: Though pre-built themes come with their own layouts, you can switch between available layouts as needed. You can even work with your development team to create custom components and layouts.

Prebuilt Experience Builder Themes

Prebuilt themes come with every template. They let you style your site with clicks, not code. Apply color, fonts, and images to your site to match your design or brand. Match your colors precisely by uploading your own logo to generate a custom color scheme. Create branding sets to change colors, fonts, and logos quickly for different audiences and needs.

Change the Theme of Your Experience Builder Site

Experiment and find the theme that works best for your needs, without changing your content.

Use Branding Sets in Experience Builder

Branding sets let you automatically change the look of your sites for different audiences and shift quickly between brands or presentations for campaigns or events.

Customize the Theme of Your Experience Builder Site

Customize the theme of your Experience Builder site by adjusting everything from the size and color of your headers and footers, to the fonts and colors for active text. We can get you started, but you get to make the final tweaks to make the theme your own.

SEE ALSO:

Developer Guide: Dynamic Branding with Login Pages

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Prebuilt Experience Builder Themes

Prebuilt themes come with every template. They let you style your site with clicks, not code. Apply color, fonts, and images to your site to match your design or brand. Match your colors precisely by uploading your own logo to generate a custom color scheme. Create branding sets to change colors, fonts, and logos quickly for different audiences and needs.

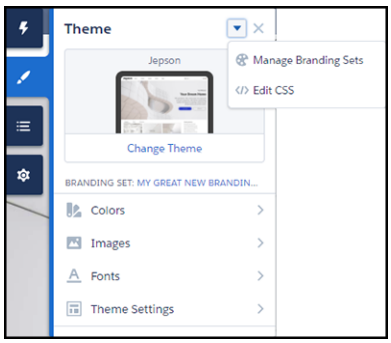
Pre-built themes give you a head start with your site that you can easily customize further. After you've created a site and selected your theme, use Experience Builder's Theme panel to adjust the experience.

EDITIONS

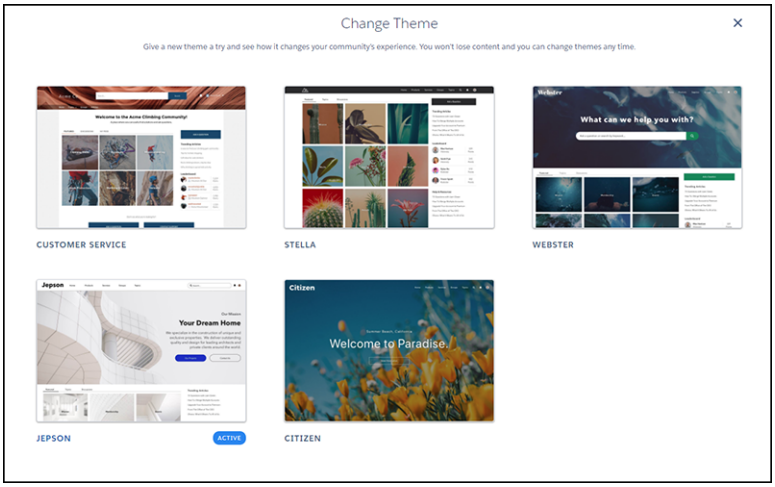
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites



Click **Change Theme** to select a theme.



Depending on the theme you select, you can use Experience Builder for various tasks.

- Choose colors for text, actions, links, navigation, and borders.
- Specify font family, style, weight, and case, and add a custom font.
- Change header and page background color.
- Choose a custom Search component.
- Choose a custom User Profile component.
- Use custom CSS to apply your own styles.
- Generate a custom color scheme from an image of your logo or company pallet.
- Use a branding set to quickly target different audiences and needs.

Note: You can apply branding sets on an audience basis to change colors, images, and fonts. For information on targeting specific layouts or content to a specific group, see Personalization with Audience Targeting in Aura Sites.

SEE ALSO:

Customize Sites with Experience Builder

Preview Your Experience Builder Site

Find and Create Asset Files in Experience Builder

Find and Create Asset Files in Experience Builder

Use Branding Sets in Experience Builder

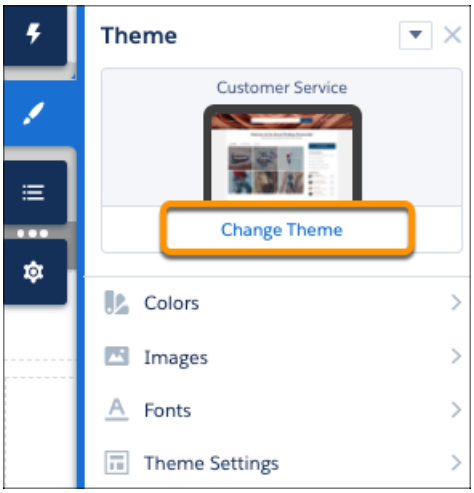
Personalization with Audience Targeting in Aura Sites

Change the Theme of Your Experience Builder Site

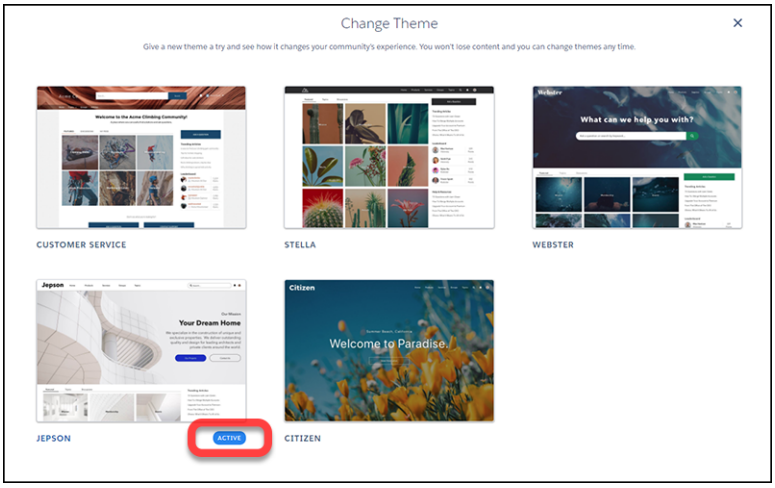
Change the Theme of Your Experience Builder Site

Experiment and find the theme that works best for your needs, without changing your content.

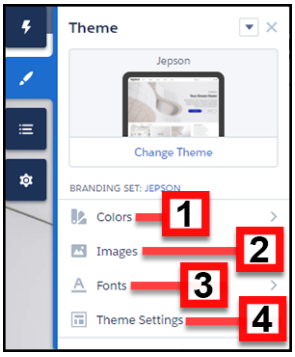
Changing themes is an easy, two-click effort in the **Theme** panel. Select **Change Theme** to see a list of available themes for your template.



Your current theme is flagged as **Active**. Select any other theme, activate it, and it's applied to your site.



Choosing a theme is just the start. Even if the defaults work for you, you're not stuck with them.



- Adjust the **Colors** (1) of text, backgrounds, and borders.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

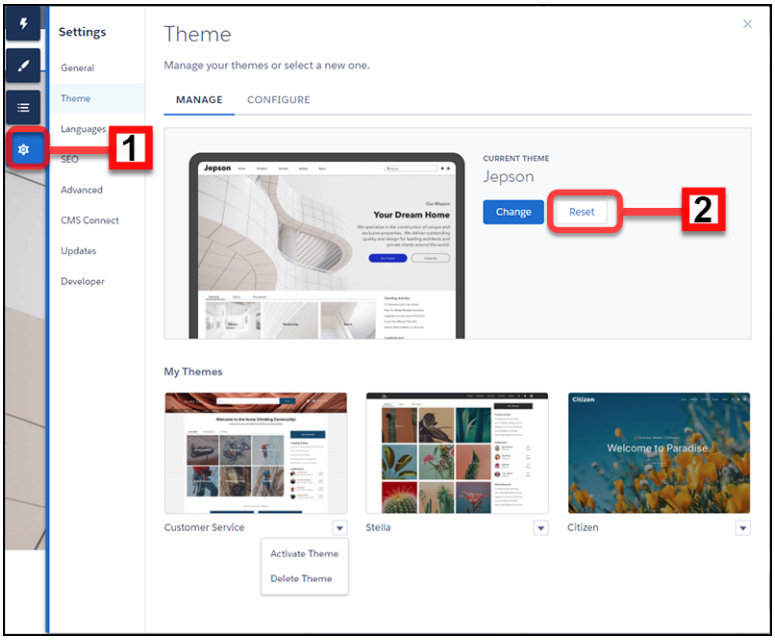
- Upload background **Images** (2) and your company logo.
- Select **Font** (3) styles.
- Adjust **Theme Settings** (4) that are specific to the active theme. For example, choose:
  - whether to show the hero
  - whether to keep the header from scrolling
  - the width of page content

    Note: Available settings are unique to the active theme.

- Add, modify, and adjust components on the page individually to complete the experience.

We remember the customizations that you create for your theme, even if you switch from the theme and then reactivate it later.

What if you don't like what you've customized? Easy, start fresh!



1. In Experience Builder Settings (1), select **Theme**.
2. Click **Reset** (2) for your current theme.
3. Read the warning and then click **Reset** to confirm.
4. Alternatively, you can reset a theme back to its defaults the next time you reactivate it in the Change Theme panel by selecting **Replace and start fresh**.

Note: Using either **Reset** or **Replace and start fresh** deletes all of your customizations.

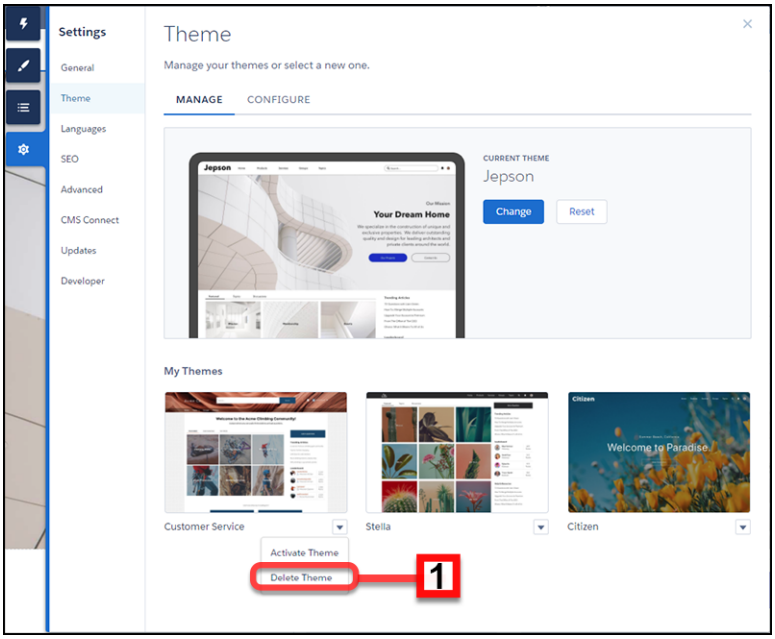
- Branding sets
- Theme regions (settings for common elements across pages like headers)
- Theme settings
- Custom theme layouts
- Custom theme layout assignments for pages
- Custom CSS overrides

These settings aren't retrievable, so be careful about selecting either **Reset** or **Replace and start fresh**.

Many pre-built themes have multiple layouts, such as home, login, and content pages.

Changing themes preserves your content, but a new theme doesn't necessarily display your content in a useful or desirable manner. After a change, always reconfirm that your site still works the way you want it to.

The Manage section of the Theme panel shows your currently active and configured themes.



Chances are you aren't using all of your themes, so you can delete (1) any extras here. Deleting a theme removes all of your customizations, similar to Reset. But you can add a fresh copy of the theme from the Change Theme section of the Theme panel.

SEE ALSO:

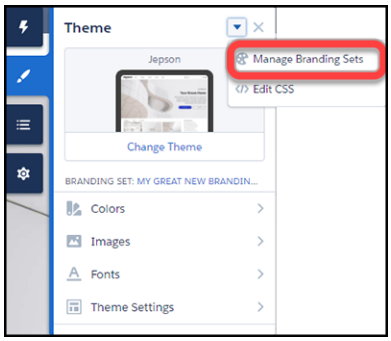
Custom Theme Layouts and Theme Layout Components

Customize the Theme of Your Experience Builder Site

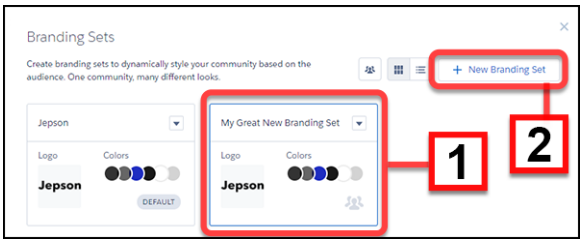
Use Branding Sets in Experience Builder

Branding sets let you automatically change the look of your sites for different audiences and shift quickly between brands or presentations for campaigns or events.

Branding Sets are bundled collections of images, fonts, and colors that can dramatically and dynamically change the look and feel of your site. You manage branding sets in the Experience Builder's Theme panel. If you're using a pre-built theme, the branding set doesn't affect the header and hero areas of your site.



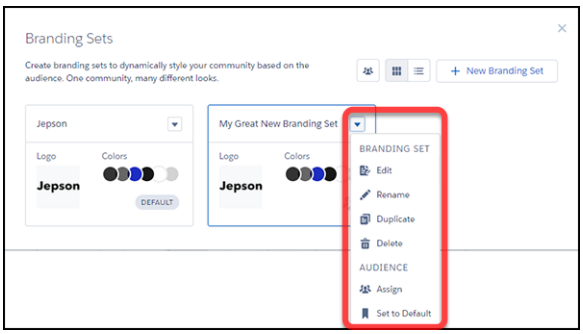
Note: Branding sets apply only to colors, images, and fonts. For more information on targeting layout or content to a specific group, see Personalization with Audience Targeting in Aura Sites.



You can maintain and manage several branding sets for any site. Each set (1) is a collection of colors and other elements that you can apply manually or programmatically, using Audiences. You can also start a new set from scratch (2).

Note: While you can create many automatic responses to audience, Dynamic Branding, such as declarations of Action Color, doesn't work with pre-built themes.

Manage each set, from its menu.



To create or edit a branding set, select it and the attributes you want to bundle.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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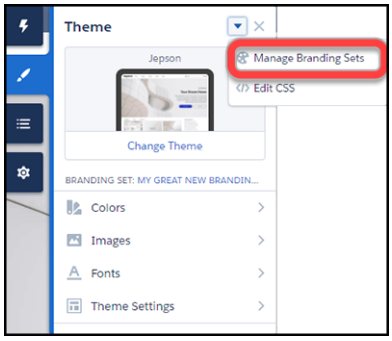
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

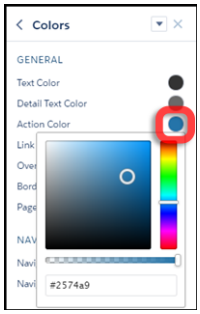
  OR

- Be a member of the site AND an experience admin or publisher in that site

1. Open the Theme panel and select **Manage Branding Sets**.



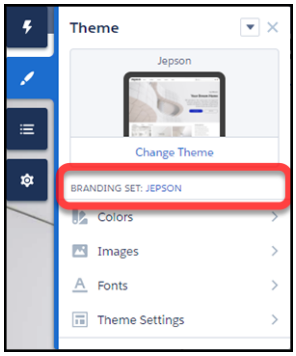
2. Choose the branding set to edit, or create one. All of your changes are associated with the selected branding set.
3. (Optional) Experience Builder can generate a color scheme for you when you select **Generate Palette from Image** in the Colors panel.
   a. In the Colors panel, click **Generate Palette from Image**
   b. Choose your previously uploaded company logo or a different image, like an image of your company palette. Experience Builder extracts the main colors from the image and generates a scheme.
   c. To modify colors, click the color swatch. To adjust the color, use the slider or enter hex values.



4. To set the attributes of your branding set, in the Theme panel, select or adjust the fonts, images, and colors.
   Your changes are saved automatically and appear instantly on the page. To review the results, select various page types from the Pages menu.

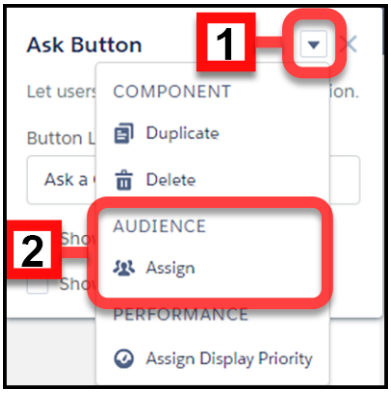
   Note: If public access is enabled in Experience Builder at the page or site level, the **Let guest users view asset files and CMS content available to the site** preference is enabled in **Administration** > **Preferences**. This preference remains enabled as long as any page has public access enabled. If you upload images for use on site login pages, be sure that this preference is enabled.When you add an image to your site for the first time, an asset file is automatically created and stored in the Org Asset Library.

   You can always tell which branding set is active by looking at the Theme panel.



Remember that branding sets apply only to colors, images, and fonts. For more information on targeting layout or content to a specific group, see Personalization with Audience Targeting in Aura Sites

Note: Not all components in pre-built themes support audience targeting. You can confirm if a component can be targeted by looking in its component properties panel menu (1) for the Audience (2) section. If the section is missing or if there isn't a menu on the component properties panel, then the component doesn't support audience targeting.



If you can't find a way to control aspects of your site through the Theme panel or component properties, you can create your own CSS overrides. Your overrides apply to, and are remembered for, the currently active theme. Click > **Edit CSS** on the Theme panel to use your own CSS styles. Use CSS sparingly, and only when necessary, in case future releases of template components don't support all CSS customizations.

SEE ALSO:

Personalization with Audience Targeting in Aura Sites

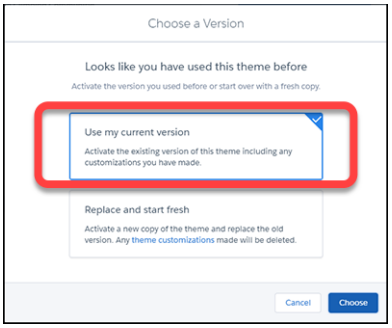
Developer Guide: Dynamic Branding with Login Pages

Customize the Theme of Your Experience Builder Site

Customize the theme of your Experience Builder site by adjusting everything from the size and color of your headers and footers, to the fonts and colors for active text. We can get you started, but you get to make the final tweaks to make the theme your own.

Every pre-built theme is loaded with options to help you achieve the style you want without ever dealing with code. And we remember how you set up each theme so you can change between them easily.

If you previously customized a pre-built theme, when you reactivate it you can decide to use your current settings or replace them and start over.



Note: Using either **Reset** or **Replace and start fresh** deletes all of your customizations.

- Branding sets
- Theme regions (settings for common elements across pages like headers)
- Theme settings
- Custom theme layouts
- Custom theme layout assignments for pages
- Custom CSS overrides

These settings aren't retrievable, so be careful about selecting either **Reset** or **Replace and start fresh**.

Changing themes preserves your content, but a new theme doesn't necessarily display your content in a useful or desirable manner. After a change, always reconfirm that your site still works the way you want it to.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

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  OR

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Adjust the Style and Layout of Your Site Theme

Experience Builder sites include several pre-built themes that you can modify easily. In addition to customizing the layouts, you can configure colors, fonts, images, sizes, and actions with a ton of choices and levers.

Theme Guidance: Header Components

Headers provide context and easy navigation throughout a site.

Theme Guidance: Hero Component

Hero images are large images that are designed to dominate the visual field of a page and grab attention.

Theme Guidance: Search Component

Multiple search components and placement options give you flexibility to design the right experience for your customers.

Custom Theme Layouts and Theme Layout Components

Theme layouts and theme layout components combine to give you granular control of the appearance and structure of each page in your site. Customize the layout's header and footer to match your company's style. Configure theme layout properties. Or use a custom search bar and user profile menu. Then use theme layouts to assign theme layout components to individual pages allowing you to quickly change layouts from one central location. Whether you're a consulting partner or an ISV, or you simply want to revamp your own site, custom theme layouts make it easy to rebrand.

SEE ALSO:

Developer Guide: Build a Condensed Theme Layout Component

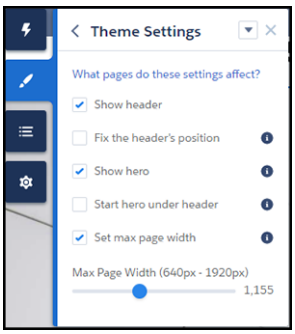
Trailhead: Create a Custom Theme Layout Component

Adjust the Style and Layout of Your Site Theme

Experience Builder sites include several pre-built themes that you can modify easily. In addition to customizing the layouts, you can configure colors, fonts, images, sizes, and actions with a ton of choices and levers.

You may be asking yourself: All those controls, where do I start?

Start with the broadest settings. The **Theme Settings** section of the Theme panel contains general settings that affect your entire theme. These settings vary depending on your site's active theme.



Setting	Description
Show header	Shows or hides the header.
Fix the header's position	Pins the header to the top of the scrolling area so that it remains visible while a customer is scrolling a long page. To see this working, publish and preview your site. The change doesn't appear in Experience Builder.
Show hero	Shows or hides the theme's hero image.
Start hero under header	Positions the hero image at the top of page, under the header, to provide a seamless look.
Set max page width	Sets the maximum width of the content across the page. Similar settings are in several component panels. The maximum width can be narrower than the overall display size of the header or hero.

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To create different layouts for different pages, in Experience Builder, go to **Settings** > **Theme** > **Configure**.

Each component type has different attributes that you can adjust in their property panels. Select a component to open its property panel and configure its options. Play with the settings to see what effects you can achieve. Changing your layouts doesn't affect your content directly, only how it's displayed. If you end up with something you don't like or can't use, and forget how to undo it, you can start over.

1. In Experience Builder Settings (1), select **Theme**.
2. Click **Reset** (2) for your current theme.
3. Read the warning and then click **Reset** to confirm.
4. Alternatively, you can reset a theme back to its defaults the next time you reactivate it in the Change Theme panel by selecting **Replace and start fresh**.

Note: Using either **Reset** or **Replace and start fresh** deletes all of your customizations.

- Branding sets
- Theme regions (settings for common elements across pages like headers)
- Theme settings
- Custom theme layouts
- Custom theme layout assignments for pages
- Custom CSS overrides

These settings aren't retrievable, so be careful about selecting either **Reset** or **Replace and start fresh**.

Theme Guidance: Header Components

Headers provide context and easy navigation throughout a site.

One header, lots of controls

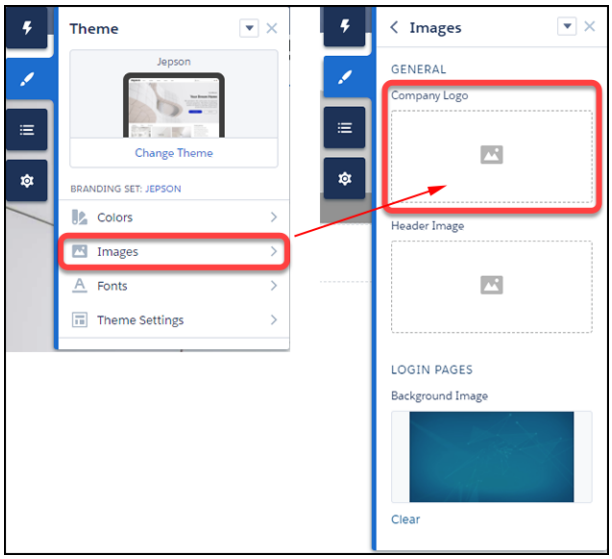
Headers have many options and controls for changing the look and feel of a page. Options and controls include the height, color, transparency, and even whether it stays fixed to the top of the screen while customers scroll. Combining adjustments to your header with adjustments to your hero section, if you use it, offers usability, variation, and visual interest. Explore the components property panel for your header and **Theme Settings** in your Theme panel.

Different headers for different types of pages in the same site

It's common to have a different layout for your login page. Many pre-built themes have different options for the login, home, and other pages. A change to the header on the home page, for instance, isn't necessarily reflected on your content or login pages. If you employ different theme layouts, configure the changes for each variation separately, as you did in previous releases.

Changing the logo

If you already set a logo for your site, it's recognized and used by pre-built themes. If you haven't set a logo in the past or want to update your current choice, use the Images area of the Theme panel.



Branding sets let you apply different logos to different variations of your site or for different audiences and occasions.

Note: We try to resize your logo to fit the header. But you can adjust the size manually in the header component properties panel, using **Logo Width** in the Layout section. Your logo proportionally resizes relative to the width selected.

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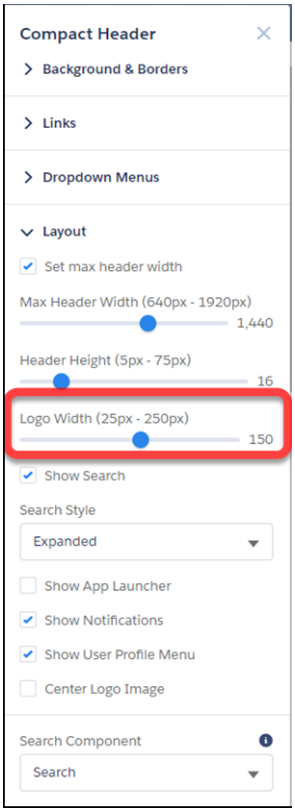
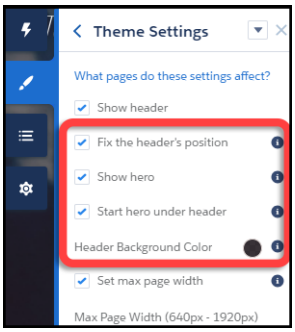


Header and hero interaction

- When "Fix the header's position" and "Start hero under header" are both enabled in **Theme Settings**, choose a background color for best visibility. If you leave the background transparent, menu items can become invisible when a customer scrolls down the page. Menu items can be hidden because the hero image has scrolled out of view. A solid background color avoids this problem.



Audience targeting

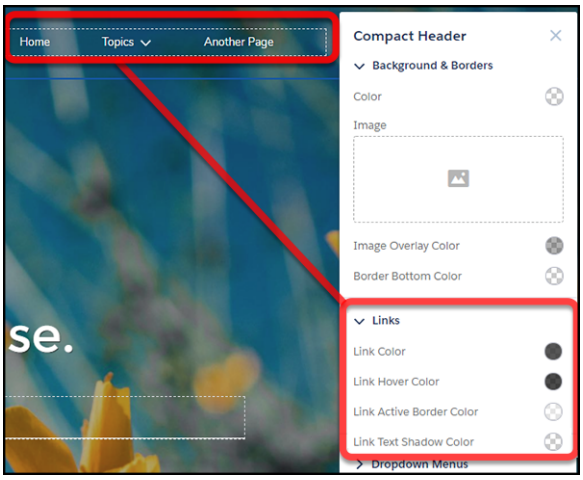
The new theme components (for example, Compact Header) don't currently support component-level targeting (visibility). However, with a little effort, it's still possible to set up targeting.

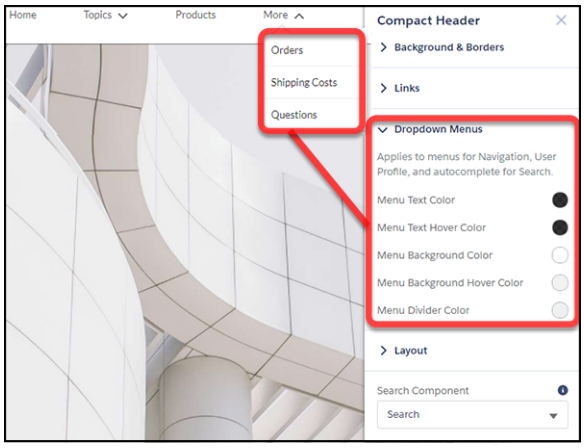
1. Create a custom theme layout in Experience Builder **Settings** > **Theme** > **Configure**.
2. Create a page variation.
3. Assign the new theme layout to your page variation (via Page Properties).

Finding the right controls.

With so many options, it can be easy to miss which control affects which part of your header.

Menu text color formats the options that appear on dropdown menus, like profile menus, navigation menus, and search deflection. Link color formats link text and icons that are visible in the header.





Mobile display

Specific aspects of the theme component properties, such as header height, are hard-coded for mobile devices using the Salesforce Lightning Design $mq-small media-query. The setting results in a maximum width of 47.9375 em.

Theme Guidance: Hero Component

Hero images are large images that are designed to dominate the visual field of a page and grab attention.

Hero layouts are all about visual impact. The *hero* is an image that dominates your page, providing a sense of theme, style, and purpose. But while hero layouts are excellent for setting mood and style, they eat up space. So they're not good for a page that needs a lot of functionality.

A search versus a call to action focus

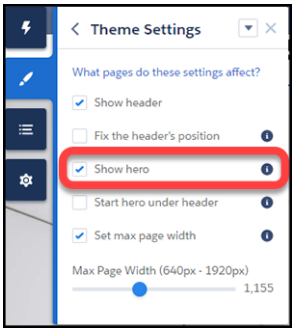
Pre-built themes come in two different flavors that focus on different needs: hero search and hero call to action.

- Uses for hero search
  - Sites that serve as an entry to a lot of diverse information with no easy way to provide a top-level organization.
  - Sites where it's challenging to predict customer needs or where your customers' information needs vary widely.
- Uses for hero call to action
  - Sites with a focused purpose, like fund-raising or a supporting a specific event.

Selecting and swapping hero components

The Webster, Jepson, and Citizen themes each come with a pre-configured hero theme component (Search or Call to Action). You can use these themes as they come or easily swap them through the component properties in Experience Builder.

Like the theme but don't want to use the hero style layout? Easy, uncheck **Show hero** on the **Theme Settings** tab of the Theme Panel.



Header and hero interaction

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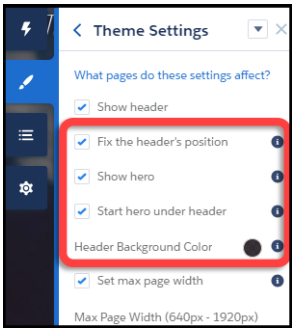
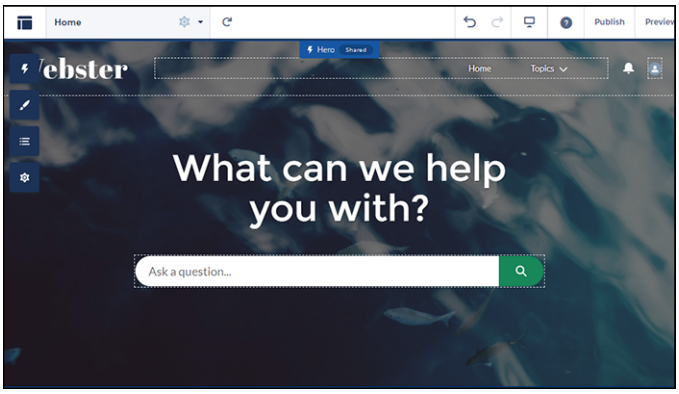


Theme Guidance: Search Component

Multiple search components and placement options give you flexibility to design the right experience for your customers.

Pre-built themes offer the flexibility to have a search-first approach. This approach encourages customers to enter questions first to find answers rather than navigate through menus and pages.



But you can also have search in your header. To avoid confusion and clutter, if you're using the hero with search turned on, deselect search to hide it in your header. Themes with heroes have secondary layouts for the non-Home pages. That's why search is on by default in the header of your other non-login pages.

Note: Remember that Login pages have their own specific layouts.

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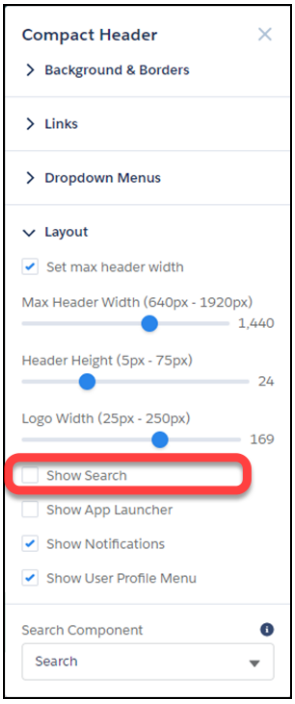
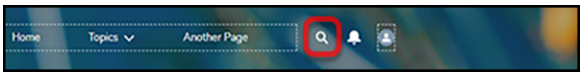


Selecting a search component that collapses and expands



When the search component is collapsed, you can't select it directly. Click the search icon to expand it, then select it to see its property editor. Alternatively, select **Search** in the page structure panel to bring up its property editor. Selecting Search in the page structure panel means you can't see any changes you're making. You can't see your changes because the search component isn't visible on the page.

Exporting a custom search component

Imagine that you're using a Lightning Bolt Solution to export a site with a pre-built theme. The theme uses the global search, peer-to-peer component, or a custom search component. Keep in mind that this solution doesn't include the custom search component. The search component isn't exported because the property value `commThemeSearch` isn't included in the Lightning Bolt Solution.

Custom Theme Layouts and Theme Layout Components

Theme layouts and theme layout components combine to give you granular control of the appearance and structure of each page in your site. Customize the layout's header and footer to match your company's style. Configure theme layout properties. Or use a custom search bar and user profile menu. Then use theme layouts to assign theme layout components to individual pages allowing you to quickly change layouts from one central location. Whether you're a consulting partner or an ISV, or you simply want to revamp your own site, custom theme layouts make it easy to rebrand.

A theme layout component is the top-level layout (1) for the template pages in your site. Theme layout components are organized and applied to your pages through theme layouts. A theme layout component includes the common header and footer (2), and often includes navigation, search, and the user profile menu. In contrast, the content layout (3) defines the content regions of your pages. The next image shows a two-column content layout.

A theme layout categorizes site pages that share a theme layout component. You can assign a theme layout component to any theme layout. Apply the theme layout in the page's properties.

Note: To create custom theme layout components in the Developer Console, a developer implements the `forceCommunity:themeLayout` interface. All of our pre-built themes are developed on top of this interface and also use several design property interfaces (color picker, image picker, slider) in Experience Builder. Pre-built themes also take advantage of theme swapping. You can quickly change the overall look and feel of the site without impacting any of the underlying pages, page layouts, and components.

Example: Let's say you create three pages for your upcoming Spring campaign. You want them to use the Large Header theme layout component that your developer created. In the **Settings** > **Theme** area, you add a custom theme layout called Spring to categorize these pages and assign the Large Header layout component to it.

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To customize an Experience Cloud site:

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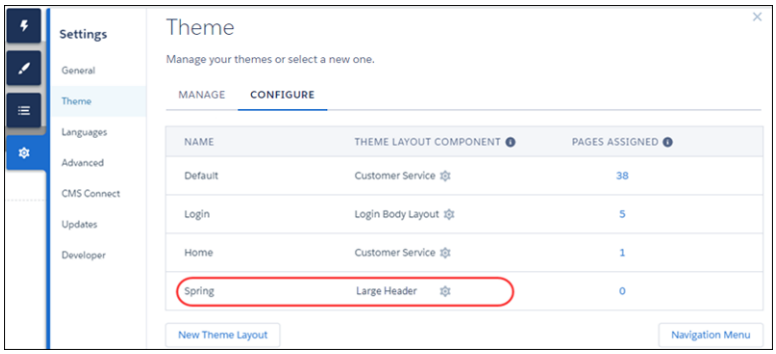
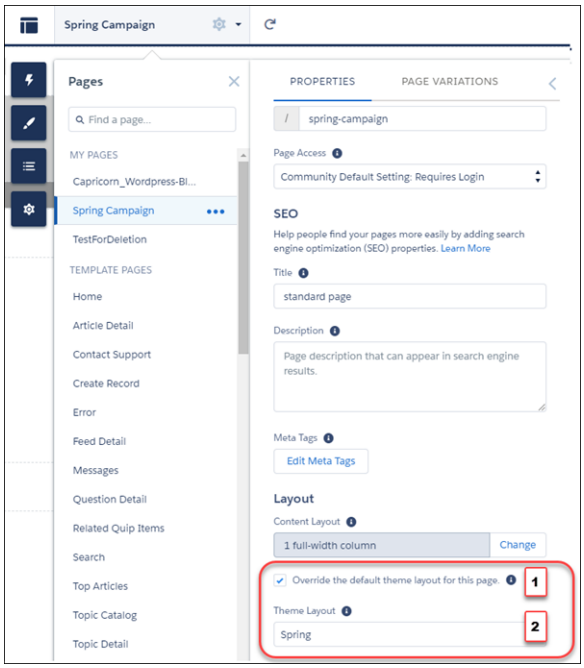


Next, apply the Spring theme layout in each page's properties, which instantly applies the Large Header layout to each page.



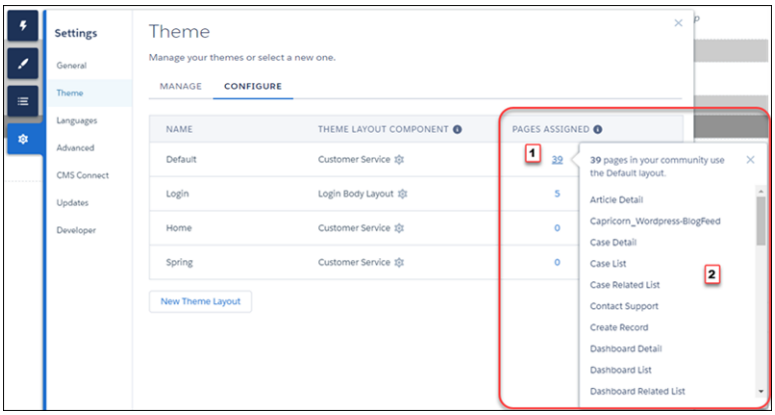
To apply the theme layout, select **Override the default theme layout for this page** (1). This selection shows the **Theme Layout** options. Then, choose the new layout (2) from the available choices.

Everything looks rosy until your VP of marketing decides that the header takes up too much room. That's an easy fix because you don't have to update the properties of each page to change the theme layout. Instead, with one click in the Theme panel, you can switch Spring to the Small Header layout component and instantly update all three pages!

Example: Now let's say that the Small Header layout includes two custom properties—Blue Background and Small Logo. You enabled and applied these properties to all your campaign pages. However, for one page, you want to apply only the Small Logo property.

In this case, you could create a theme layout called Spring B, assign the Small Header layout component to it, and enable Small Logo. Then, you apply the Spring B theme to the page.

Not sure which pages are associated with any of your theme layouts?



With a click and a glance, you can see how many and which pages are associated with any of your theme layouts. From **Settings** > **Theme**, click the Pages Assigned total for any theme layout row (1). Clicking this value opens a list of the pages associated with that theme layout (2).

Theme layouts make it easy to reuse the same theme layout component in different ways while maintaining as much granular control as you need.

SEE ALSO:

Change the Theme Layout of Your Experience Cloud Site's Pages

Experience Cloud Developer Guide: Create Custom Theme Layout Components for Experience Builder

Experience Cloud Developer Guide: Configure Swappable Search and Profile Menu Components

Developer Guide: Build a Condensed Theme Layout Component

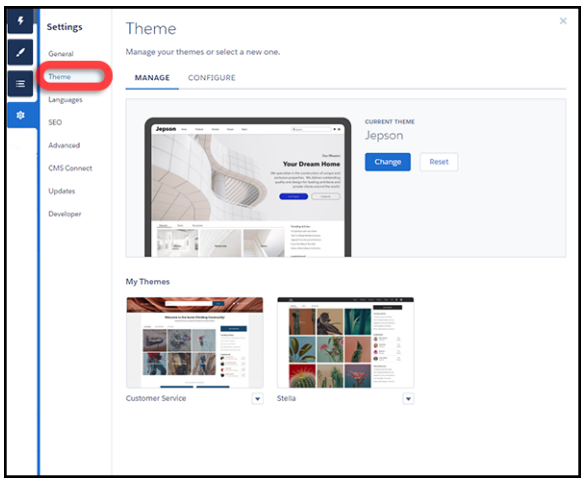
Trailhead: Create a Custom Theme Layout Component

Change the Theme Layout of Your Experience Cloud Site's Pages

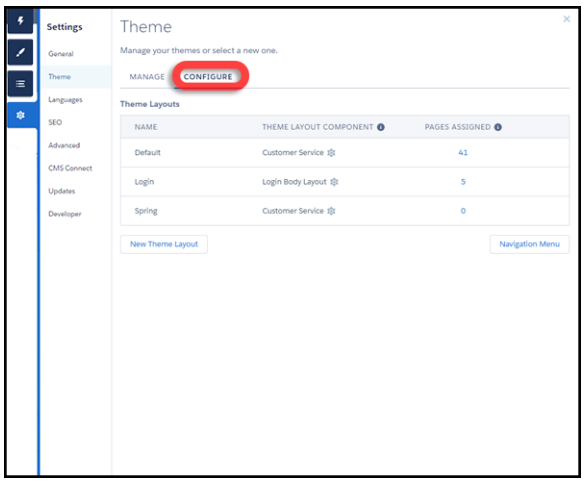
A theme layout defines the top-level regions of your page, such as the header and footer, navigation, search, and the user profile menu. A theme layout component categorizes the pages in your site that share a theme layout.

A developer creates custom theme layout components in the Developer Console by implementing the `forceCommunity:themeLayout` interface. The developer can also add properties to a custom theme layout, which you can configure in the Theme panel area in Experience Builder. When the custom layout component is available, assign it to a theme layout to instantly transform the pages that use that layout.

1. In Experience Builder, click on the left sidebar and then click **Theme**.



2. To view and configure your theme layouts, select **Configure**.



3. If necessary, create a **New Theme Layout**.
4. Select a theme layout component for the theme layout.

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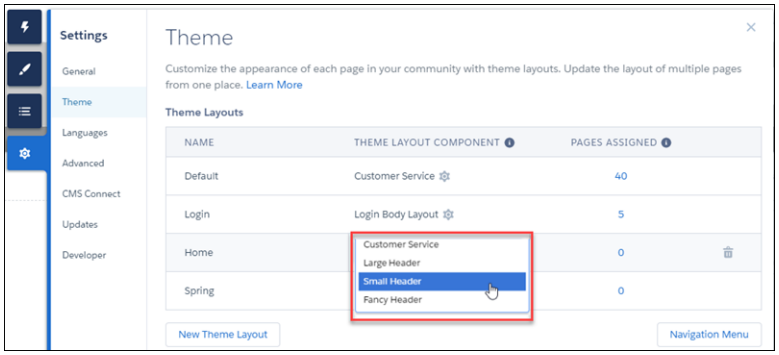
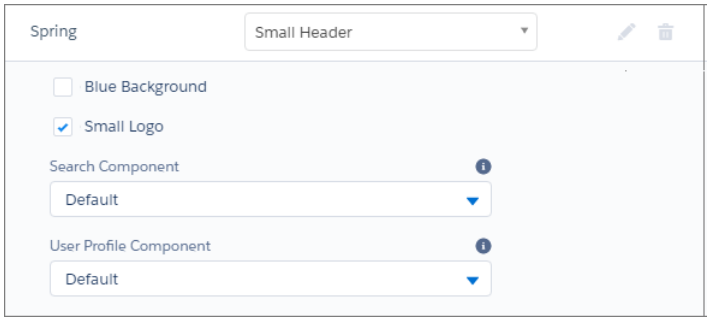


5. Update the theme layout's settings, if available—properties vary depending on how your developer configured the theme layout component.



For example, the Default layout component in the Customer Service theme includes the following options for the header region.

Hide the header region and navigation
Hides the default site header on all site pages. The default site header includes the header image, search box, site menu, and user profile navigation menu. Select this option to replace the default header with a custom header.

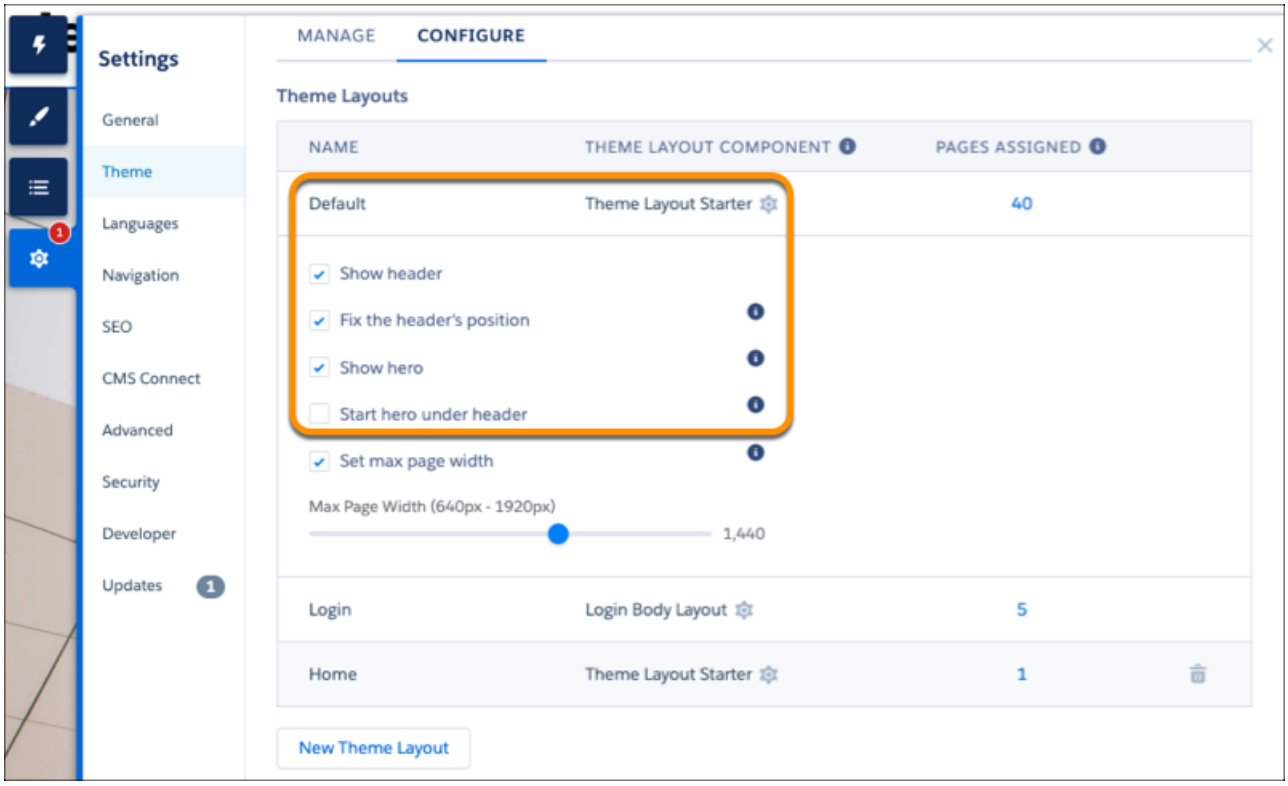
Hide notifications icon in site header
Hides the notifications icon. Useful when you have a custom header or don't use notifications.

Search Component
Replaces the default Search and Post component with a custom component, if available.

User Profile Component
Replaces the default Profile Header component with a custom version, if available.

Set max page width
Sets the maximum width of content across the page. The maximum width can be narrower than the overall display size of the header or footer.

However, the Default layout component for the Jepson theme has different options.



Show header

Displays or hides the header.

Fix the header's position

Pins the header to the top of the scrolling area so that it remains visible while a customer is scrolling down through a long page. To see this working, publish and preview your site. The change doesn't appear in Experience Builder.

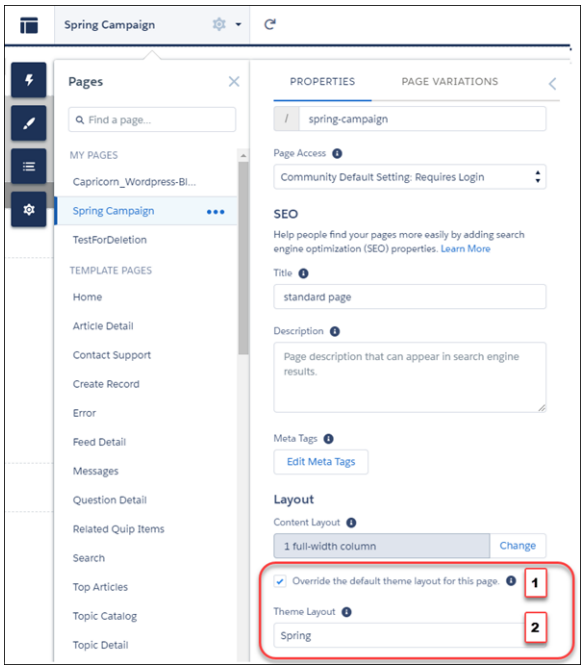
Show hero

Displays or hides the theme's hero image.

Start hero under header

Header visually overlaps the hero. We recommend using a transparent background for this header.

6. To apply the theme layout, select Override the default theme layout for this page (1). Selecting this option shows the Theme Layout options. Then, choose the new layout (2).



SEE ALSO:

Custom Theme Layouts and Theme Layout Components

Page Properties and Types in Experience Builder

Experience Cloud Developer Guide: Create Custom Theme Layout Components for Experience Builder

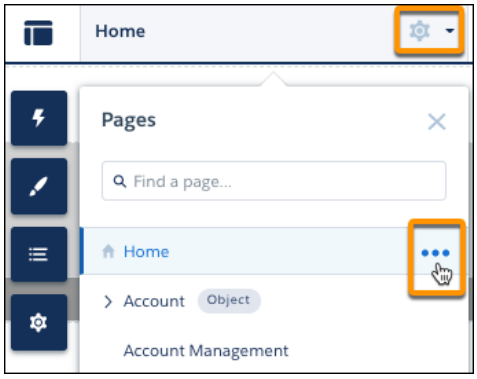
Experience Cloud Developer Guide: Configure Swappable Search and Profile Menu Components

Change the Content Layout in Experience Builder

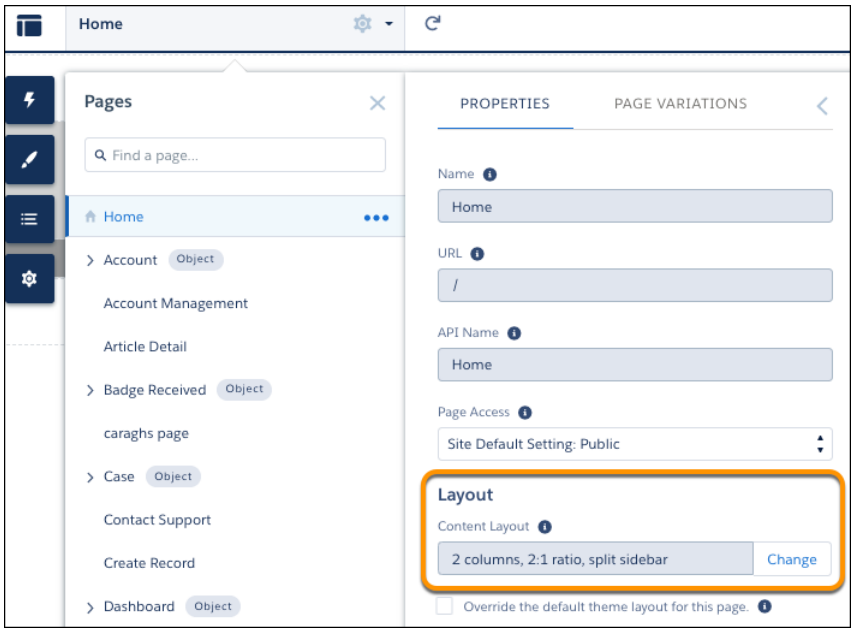
Quickly change the look of your Experience Builder site pages by switching to a different content layout. You can even create your own custom content layout components in the Developer Console and import them to use in your site.

Tip: When you set up a new page or page variation, use a flexible layout. These highly customizable layouts are more adaptable than ready-to-use layouts, and you can re-create most fixed layouts by using a flexible layout.

1. In Experience Builder, open the page's properties. Click beside the page on the top toolbar, or click > **Page Settings** beside the page in the Pages dropdown menu.



2. In the Layout section of Page Properties, click **Change**.



If a page variation is available, you can make it the active page by selecting the page variation. You can then change its content layout as required.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

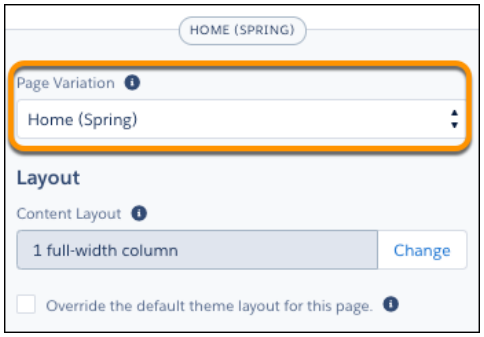
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

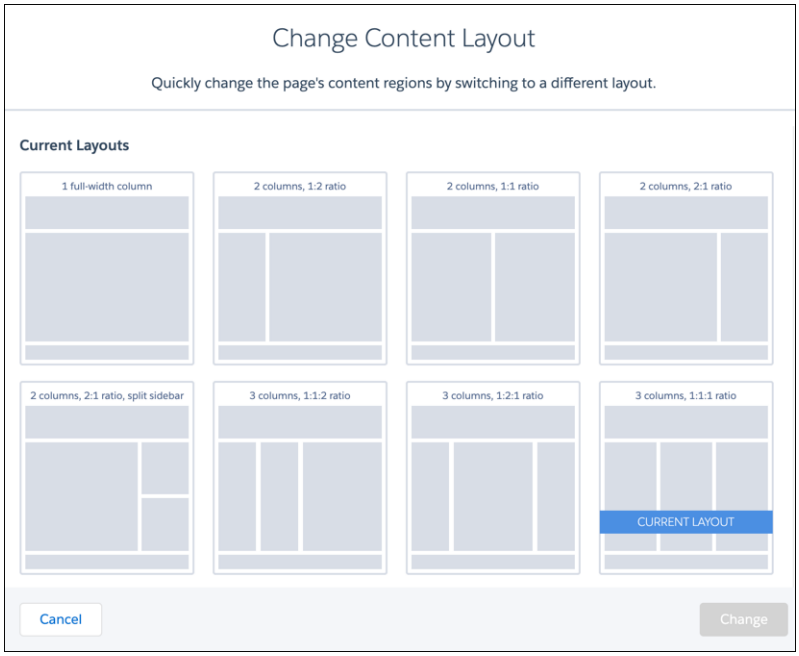
- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



3. Select the new layout. If you created a custom content layout component, you see both ready-to-use and custom content layouts displayed together.



Note: You can't use Lightning web components with the 2 column, 2:1 ratio, split-sidebar fixed layout. To incorporate Lightning web components on a page with this layout, use a flexible layout to create a page or page variation that's arranged the same way.

4. Click **Change**.
If the structure of the new layout is different from the current layout, some regions aren't visible. However, the regions are still available and you can switch to a different layout at any time.

Note: If you change the layout of a default template page, the only way to revert to the original layout is to click **Undo**.

SEE ALSO:

Experience Cloud Developer Guide: Create Custom Content Layout Components for Experience Builder

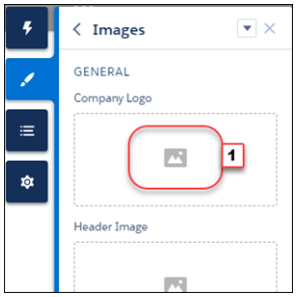
Create a Flexible Layout

Find and Create Asset Files in Experience Builder

Upload and select images for your header, logo, rich content editor, and custom components using the file selector in Experience Builder. After they're uploaded, files are converted to packageable asset files and stored in your org asset library for easy reference and retrieval.

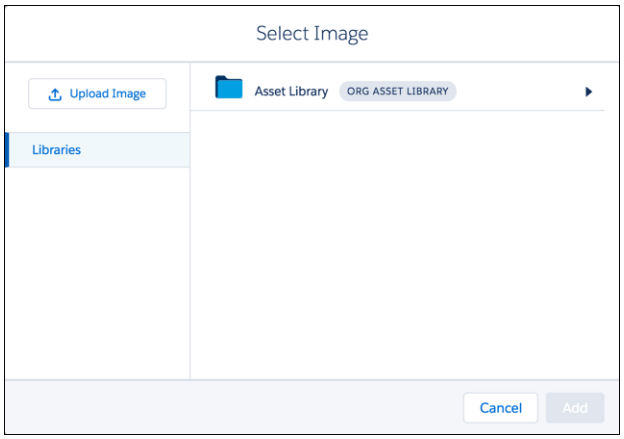
Note: Salesforce admins and community managers have access to the Asset Library by default. Standard users who are members of the Asset Library can edit and delete asset files they own. Only admins can edit and delete asset files they don't own. To allow standard users to upload content in Experience Builder, make sure they are members of the Asset Library.

1. From Experience Builder, open the Theme panel and select **Images**. Click an image icon (1) to open the unified file selector.



The file selector displays only image files, so you don't have to wade through all your files to find your logo or header image. If the image file you want is already an asset file, it's in the asset library, which is clearly marked by the Org Asset Library badge. Asset files for your Salesforce org and all your sites are stored in the Org Asset Library, so you don't need to maintain copies in different places.

2. Select an existing file or click Upload Image to add a new one.



When you add an image to your site for the first time, an asset file is automatically created and stored in the Org Asset Library. Admins have full access to the Org Asset Library and can search for, tag, and subscribe to asset files.

To provide library access to users, add them as members of the library with the appropriate permissions. Users without these permissions don't see the Org Asset Library. The Org Asset Library is available in all new orgs, and is automatically activated in existing orgs.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize or publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To edit or delete asset files or to add asset files to the Asset Library by default in Experience Builder or Salesforce CMS:

- Customize Application

Note: If public access is enabled in Experience Builder at the page or site level, the **Let guest users view asset files and CMS content available to the site** preference is enabled in **Administration** > **Preferences**. This preference remains enabled as long as any page has public access enabled. If you upload images for use on site login pages, be sure that this preference is enabled.

SEE ALSO:

Asset Files

Experience Builder Settings

Use the Settings area to track which template you're using, view your site's status, and customize your template. If you're using the Customer Service template, easily access your navigational and featured topic settings.

To access the Settings area in Experience Builder, click on the left sidebar. Not all settings are available for all sites.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

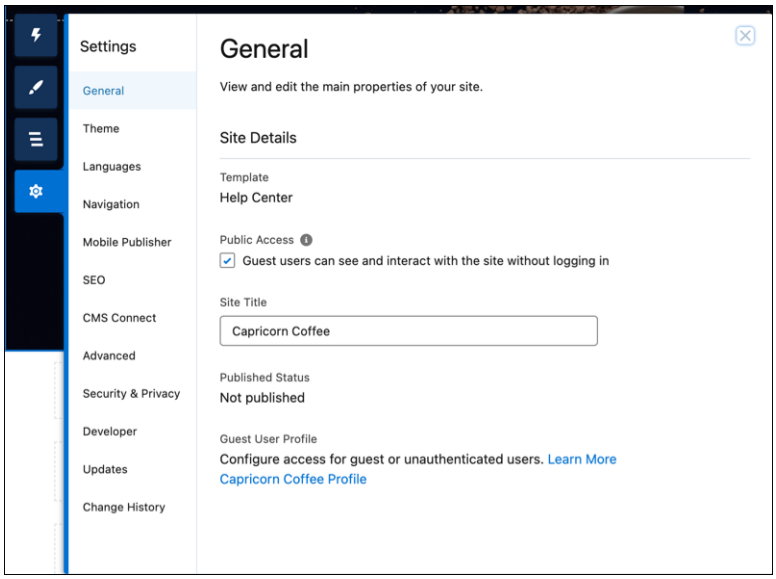
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



General

In the General area, settings include:

Template

Shows the name and version of the template that your site uses.

Public Access

Specifies the level of access to the page. When you enable public access, guest users can view asset files on public pages by default. However, users whose profile settings are more restrictive can't always view this page, even if you choose Public.

When you enable public access, the preference **Let guest users view asset files on public pages** in **Administration** > **Preferences** is automatically enabled.

Site Title (Aura sites only)

Lets you set the title for your site. The title briefly appears in the browser's title bar before your site's Home page loads.

Published Status

Indicates whether your site is published. If it's published, click the link to open the live site in a separate browser tab.

Preferred Domain

Lets you choose which domain to use for indexing your site's pages to improve search engine results. (Multiple domains for the same site can dilute search engine results and lower page ranking.) The Preferred Domain dropdown appears only after you set up a custom domain for your site in Setup. You can set only HTTPS preferred domains.

Guest User Profile

Shows the associated guest user profile. When you click the link, you go to the Profile page in Salesforce Setup, where you can modify profile settings, such as which permissions the guest user has. For more information about configuring the guest user profile, see Give Secure Access to Unauthenticated Users with the Guest User Profile.

Set Featured and Navigational Topics (Customer Service template only)

Define featured topics and topics to be used for navigation in Experience Workspaces or Experience Management.

Theme

In the Theme area, you can control the layout and appearance of each page in your site.

Languages

In the Languages area, set the multilingual properties for your site. When you set these properties, the Language Selector component uses them to let guest users select their preferred language on a page in your site.

Navigation

In the Navigation area, create and manage navigational menus for your site. You can use menus in Navigation, Tile Menu, Profile, and custom menu components.

Mobile Publisher

Configure navigation options and settings for your Mobile Publisher app.

SEO (Aura sites only)

In the SEO area, you can define what information can be indexed by external services and discovered through online searches. From the Guest User Profile, make an object's records public and available for SEO indexing. You can also generate a manual sitemap refresh for your site.

Note: To access SEO settings in Experience Builder, enable public access for your site from the General area in Settings.

Search (enhanced LWR sites only)

In the Search area, you can rebuild the index after you publish fresh content in your site or in the connected CMS workspace. Your site visitors can then see your new content in their search results. This feature is available only after you set up a standard Search page.

CMS Connect (Aura sites only)

Add a header and footer from a connected CMS source to your site.

Advanced

In the Advanced area, you can track page views, mask IP addresses, add markup to the page head, and show all components in the Components panel.

By default, we filter the components available in the Components panel according to each page's purpose. For example, the Case Comments Publisher is available only for the Case Details page. When you enable **Show all components**, you see the complete list of components when you open the Components panel for any page (except login pages). However, you can still add the Related Questions List component only to the Question Detail page and the Related Articles List component only to the Article Detail page.

Important: Some components require the page to pass specific parameters. When you remove component filtering, you can add a component that relies on a passed parameter to a page that doesn't pass any values. For the component to work correctly, you must manually configure the component's parameters.

For example, some components that take `{!recordId}` as a parameter expect to get this value from the page's URL. If you add the component to a page that doesn't pass this value through the URL, you must manually provide it.

Similarly, let's say you add the Group Detail component, which requires a `{!recordId}` value, to the Case Detail page instead of the Group Detail page. Although both pages pass a `{!recordId}` value, the ID that Case Detail passes is incorrect.

Integrations (LWR sites only)

Add functionality such as Google Analytics to your site.

Security & Privacy

Manage security and privacy settings for your Experience Cloud site, including Clickjack protection, Content Security Policy (CSP), and site cookie usage.

Updates

In the Updates area, you can update your site's template to the latest version.

Developer (Aura sites only)

In the Developer area, you can export customized Experience Builder templates and pages. You can add these templates and pages to a Lightning Bolt Solution to distribute to other orgs or publish on AppExchange.

Change History

The Change History area shows a chronological list of publication dates for your site and records any changes made to the configuration of domains that are associated with your site. The panel also shows which user made each update.

Update Your Experience Builder Site's Template

We introduce amazing features and enhancements with every release, so it pays to keep your Experience Builder site up to date! Typically, we automatically update your template to the latest version, so you can start adding the newest features to your site right away. However, when the changes are significant, you're required to update your template manually.

Note: All template improvements are made on the latest version. Avoid missing out by keeping your template current.

The Koa and Kokua templates are in a phased retirement. From Summer '17, you can no longer use them to create sites. We therefore recommend working with Salesforce Support to replace your existing Koa and Kokua sites. Take advantage of the latest templates, which provide richer support for Knowledge and case management, along with a slew of other new features.

We no longer support Koa, Kokua, and Customer Service template versions from before Winter '16 (October 2015).

The impact of updating a template depends on the version your site is using. When a manual template update is available, a red notification icon ( ) appears over the Settings icon.

Important: We strongly recommend that you test the impact of the update in a sandbox environment. After you update and publish your site, you can't revert to an older version.

My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
Winter '19 templates and Lightning Bolt solutions	• Accessibility and performance improvements on the following components: – Navigation Menu – Reputation Leaderboard – Related Records – Trending Articles by Topics If you've applied CSS customizations, migrate them in the upgraded components.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To update your template
- Create and Set Up Experiences AND Manage Experiences

My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
	Overriding CSS isn't recommended. The best way to update the styling of your components is to use the Theme panel in Experience Builder. To update existing CSS overrides see CSS mappings for updated components.
Summer '18 templates and Lightning Bolt solutions	Your site is updated automatically with all the features of the Winter '19 release. No need to manually update.
Spring '18 templates and Lightning Bolt solutions	• Improvements to tooltip positioning by changing several panels, dialogs, and tooltips to use a shared container • Updates to the Language Selector's functionality and appearance (current preferences are maintained) • Improvements to the property editor container • All the changes that apply to subsequent updates • If you've applied CSS customizations, migrate them to the upgraded components Overriding CSS isn't recommended. To update existing CSS overrides, see CSS mappings for updated components and Standard Design Tokens for Sites.
Winter '18 templates and Lightning Bolt solutions	• A dropdown menu to set audiences at the component level • Out-of-the-box UI enhancements, such as font sizing • Upgraded Reputation Leaderboard, Trending Articles by Topic, and Related Articles. If you've applied CSS customizations, migrate them to the upgraded components. Overriding CSS isn't recommended. The best way to update the styling of your components is to use the Theme panel in Experience Builder. To update existing CSS overrides see CSS mappings for updated components. • A new User Profile Menu component that automatically replaces the Profile Header component in updated templates • The base component on the Record Detail page for custom objects is replaced with a newer version for desktop view mode. If you currently have CSS overrides for record layout, keep them, and refer to *CSS Overrides Migration for the Record Layout Component* to add your styles and customizations to the new component • A new Theme panel that redesigns the Branding Panel in Experience Builder. • Additions to Theme settings that help you easily see which pages a theme layout is associated with • More metadata options to improve discoverability of pages through SEO • Query parameters in a site URL, other than language, no longer persist while navigating within a site • Updates to CMS Connect (JSON) require manual updating to connections created with the Winter '18 release. – CMS Connect (JSON) now autocreates detail pages. URL's using query parameters pointing to your manually created pages continue to work. However, they aren't accessible from the CMS Connect (JSON) Property Editor in Experience Builder.

My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
	For better SEO and management, it is best to use the new, automatically created pages. 1. In Experience Workspaces, add a Content Type and the JSON path for both ID and Title. 2. In Experience Builder, open the Property Editor of the existing CMS Connect (JSON) component by selecting it. 3. Click **Save** to create and autoconfigure the new detail page. The standard page you created in Winter '18 for navigation isn't automatically deleted. If it's not referred to by any other component, you can manually delete it from the Pages menu. – CMS Connect (JSON) has new configuration fields. • When editing an existing JSON connection, the Connection Type is Public by default and Content Type, Title, and ID are empty. Title and ID have to be filled before the connection can be saved again. You can have only one Content Item per Type and it's necessary to define a Content Item for navigation support. – If you have multiple Content Lists and a single Content Item in an existing connection, when you edit your CMS Connection a single Content Type is created in the JSON section with the Content Item and Content Lists assigned to it. – If you have multiple Content Items and Content Lists, when you edit your CMS Connection you have one Content Type with a single Content Item and all of your Content Lists under it. The remaining Content Items are each in a separate Content Type. • All the changes that apply to subsequent updates.
Spring '17 and Summer '17 Customer Service, Partner Central, and Lightning Bolt solutions	• Decoupling of the search box from the site header, making it easier to insert your own search experience within a site. The Search page in the Winter '18 version of the Customer Service (Napili) template doesn't include the Headline component out of the box. If your site's Search page includes the Headline component, it's removed as part of the upgrade. • Sleeker header component improves your site's mobile experience, leaving more room to show what's important to your site. • Out-of-the-box UI improvements, such as improved spacing in text fields. • Streamlined new Global Search for Peer-to-Peer Sites. • Upgraded, high-performance navigation menu that offers more styling options and reduces the need for CSS overrides. If you have applied CSS customizations, migrate them to the upgraded navigation menu.

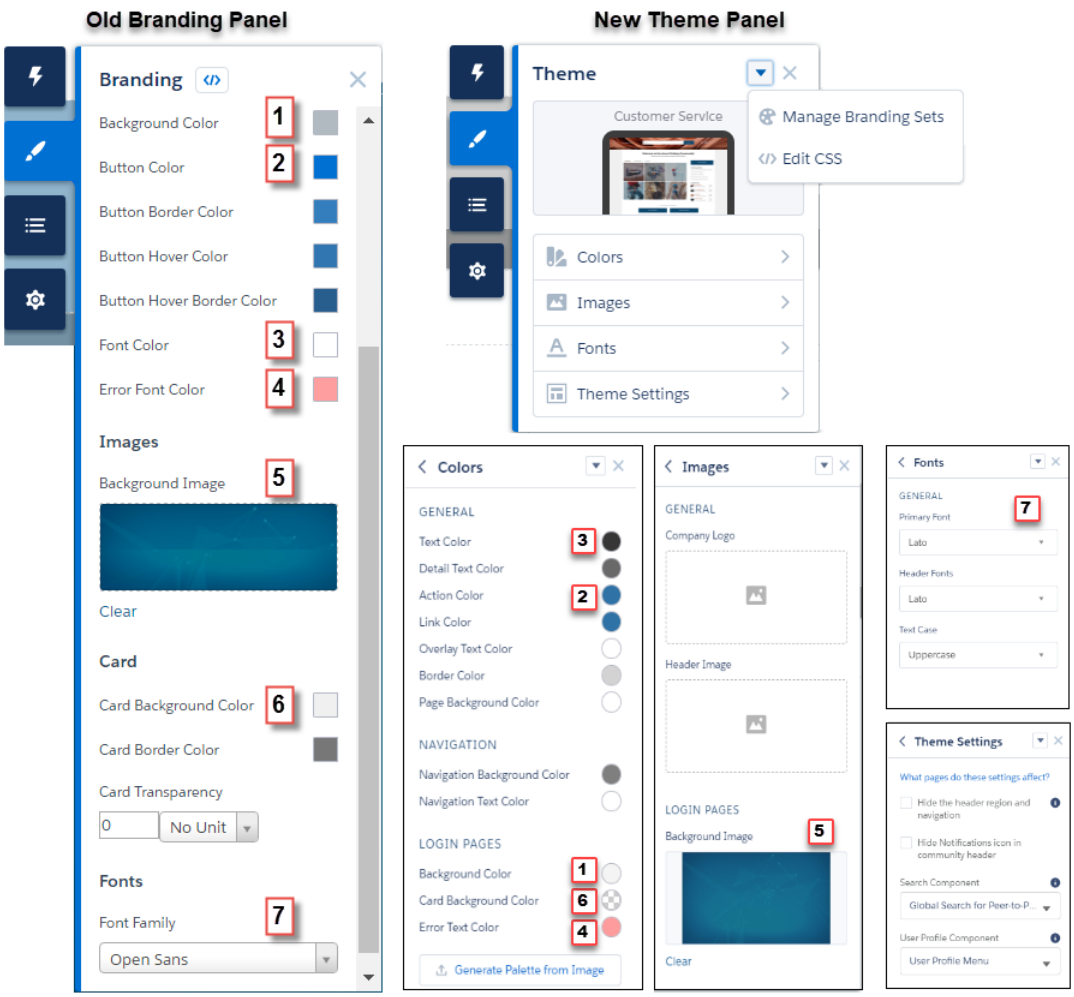
My Current Template Type and Version	What Can I Expect When Updating to Spring '19?
	Overriding CSS isn't recommended. The best way to update the styling of your navigation menu is to use the Theme panel in Experience Builder. To update existing CSS overrides see CSS mappings for updated components. • Adoption of Lightning Design System principles in all content layouts. • Two new branding options: Navigation Background Color and Navigation Text Color. • All the changes that apply to subsequent updates.
Winter '16 to Spring '17 Customer Service (Napili)	• Login pages retain branding but lose custom code or component customizations. • All the changes that apply to subsequent updates.
Pre-Winter '16 Koa, Kokua, or Customer Service (Napili)	Most component customizations and properties are overwritten. However: • For Koa and Kokua, general settings, such as Category Group Name, Top-Level Category, and Company Name, carry over. • For Customer Service (Napili), topic definitions carry over. • All the changes that apply subsequent updates.
Pre-Spring '16 Aloha template	Most branding properties defined using the Branding Editor in Experience Builder are maintained. However, sometimes your site's colors are reset to the default value. After you update the template, check the branding properties and update the ones that were reset
Salesforce Tabs + Visualforce	Template updates for sites using Salesforce Tabs + Visualforce aren't managed from Experience Builder.

For information on component compatibility with older template versions, see Which Components Can I Use with Each Template?

To update your template:

1. In Experience Builder, click > **Updates**.
2. Click **Update** and confirm the update when prompted.
3. Make sure that your login pages look correct, and reconfigure missing branding properties, custom code, and component customizations.
4. Publish your site to apply the template updates.

If you are upgrading from a pre-Winter '18 template, some of the old branding properties are reorganized but still there, while others map to different properties. Let's take a closer look at the changes.



Pre-Winter '18 branding properties ...	Map to these updated branding properties ...
Background Color (1)	Background Color (1)
Button Color (2)	Action Color (2)
Button Border Color	—
Button Hover Color	—
Button Hover Border Color	—
Font Color (3)	Text Color (3)
Error Font Color (4)	Error Font Color (4)
Background Image (5)	Background Image (5)
Card Background Color (6)	Card Background Color (6) Also controls card transparency
Card Border Color	—

Pre-Winter '18 branding properties ...	Map to these updated branding properties ...
Card Transparency	—
Font Family (7)	Primary Font (7)

SEE ALSO:

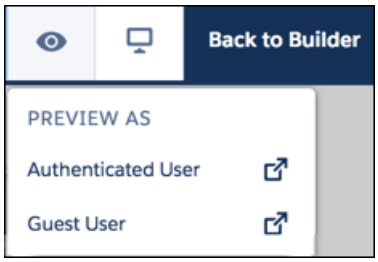
- Experience Builder Settings
- Customize Sites with Experience Builder
- Considerations for Changing Your Template

Preview Your Experience Builder Site

Before going live, you can preview your Experience Builder site to see how it looks in a desktop browser window or on a mobile device.

- To preview the site in a browser window, click **Preview** on the toolbar.

- In Preview mode, to see the site in its own browser tab as:
  - A logged-in customer would see it, click > **Authenticated User**.
  - An unauthenticated visitor would see it, click > **Guest User**. As long as your site includes one public page (such as the Home page), you can use the **Guest User** option.



- To preview the site on different devices, use the options in the menu.

SEE ALSO:

Customize Sites with Experience Builder

Publish Your Experience Builder Site Customizations

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Publish Your Experience Builder Site Customizations

Publish your site in Experience Builder to make your branding and component customization updates available to your site's members.

Tip: Publishing an Experience Builder site for the first time makes the site URL live and enables login access for site members. Unlike Salesforce Tabs + Visualforce sites, you don't need to activate an Experience Builder Site unless you want to set up SEO and send out a welcome email.

1. In Experience Builder, preview your site to make sure that your updates appear as expected.
2. When you're happy with your changes, click **Publish** in the toolbar to publish your changes.

   Important: *All* changes made to a site since the last time it was published are included.

An email notification informs you when your changes go live.

SEE ALSO:

Customize Sites with Experience Builder

Preview Your Experience Builder Site

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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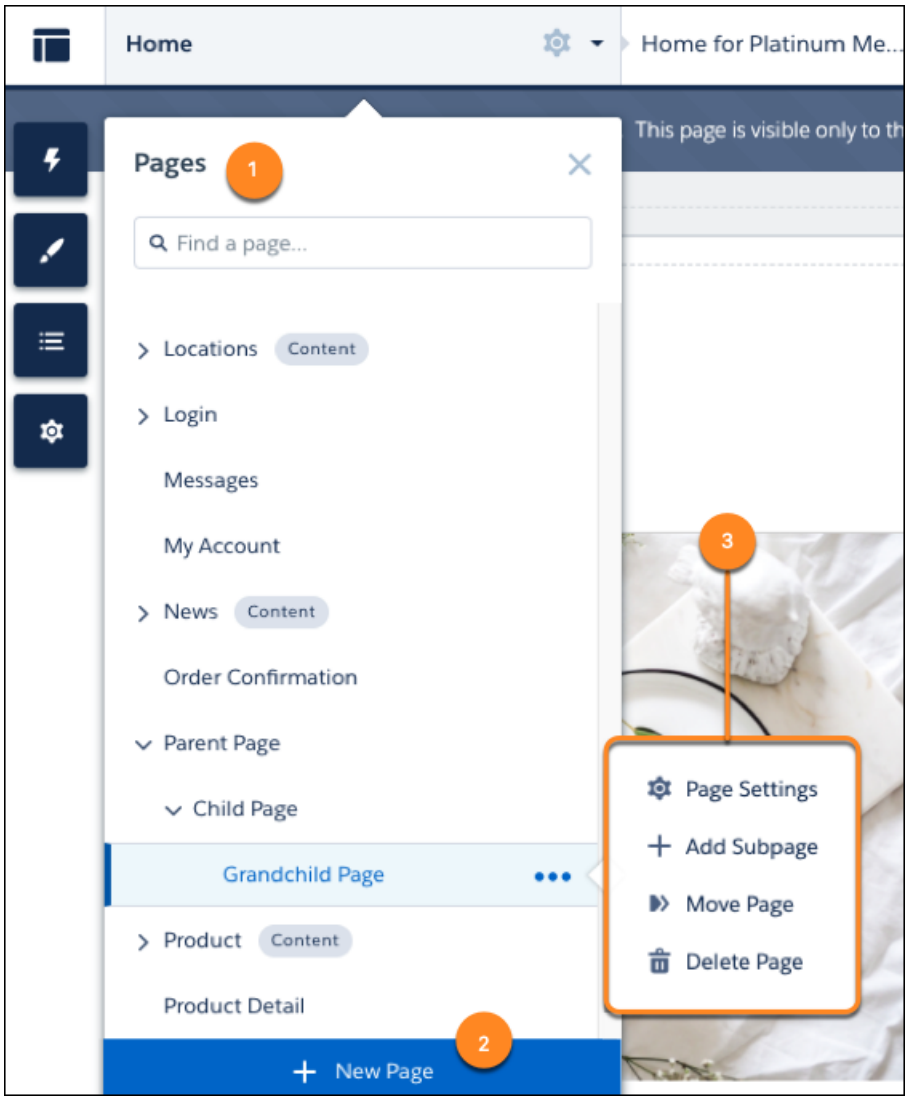
Manage Your Site's Pages and Their Properties in Experience Builder

The Pages and Page Action menus centralize all your page-related needs, from page creation to audience criteria-based page visibility and everything in between.

From the Pages menu (1), you can search for a page, add a page (2), or click ••• to access the Page Action menu (3).



EDITIONS

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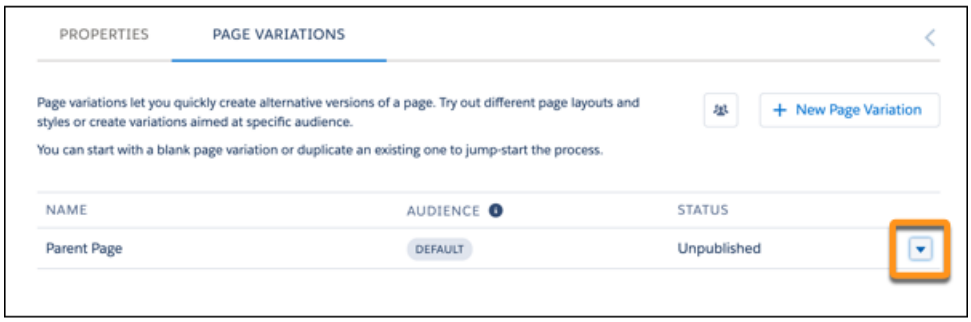
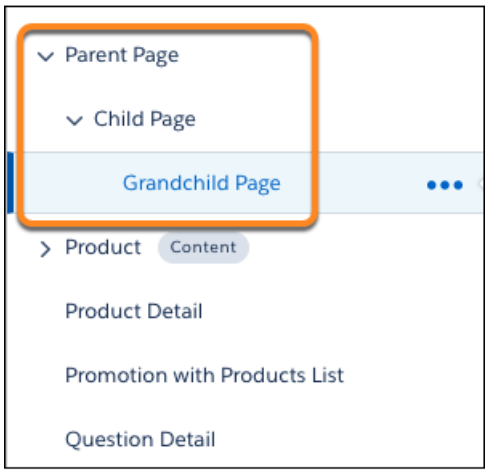
From the Page Action menu, you can:

- Click **Page Settings** to edit a page's properties, such as its URL, layout, or variations.

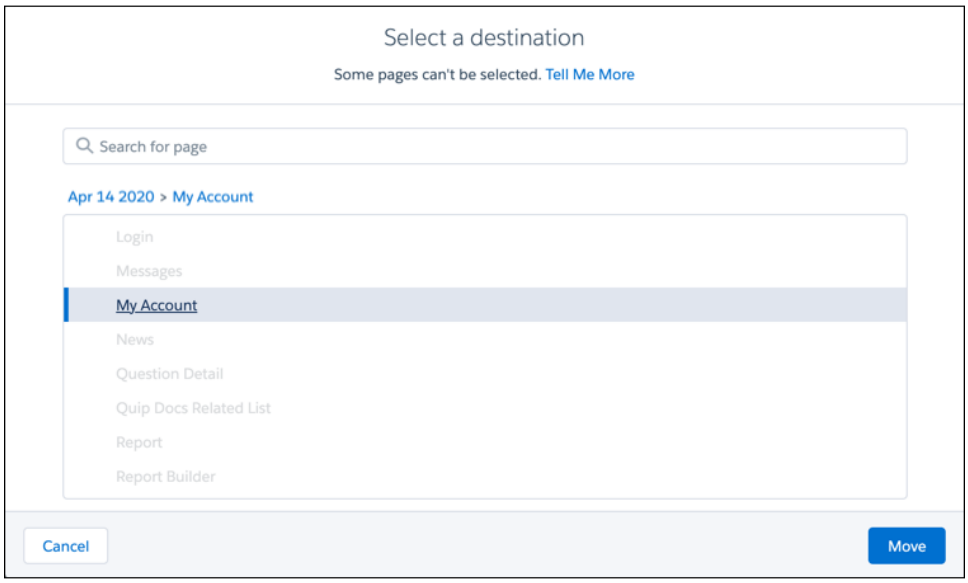
  From Page Settings, click **Page Variations** to create alternative versions of a page and set audience criteria for the page's visibility. If the selected page isn't a template, you can easily delete it and its page variations with a single click.



- Click **Add Subpage** to build out your site's hierarchy with up to six page levels by nesting a standard, object, or content page under an existing page.

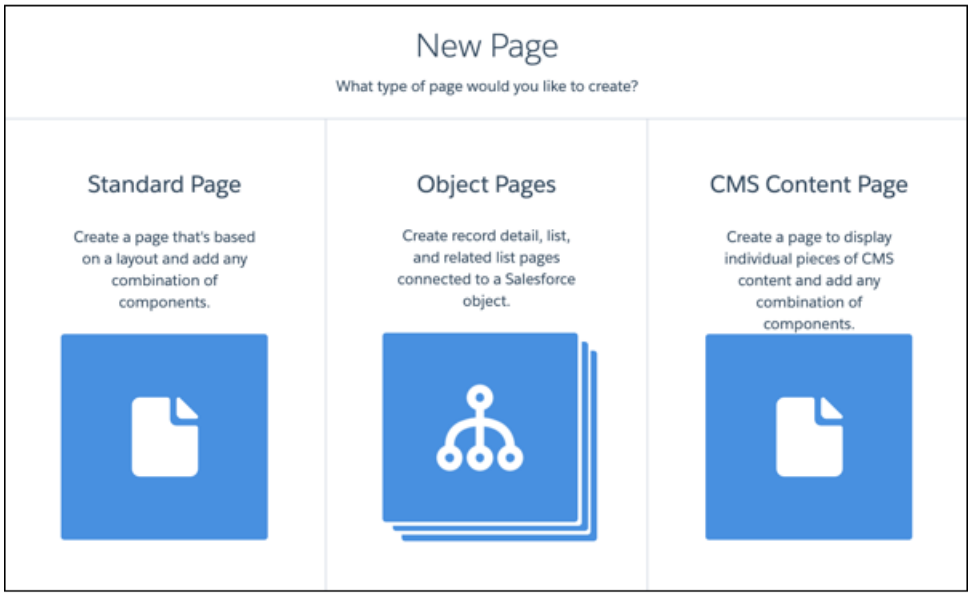


- Click **Move Page** to change your page hierarchy and move a page and its subpages to a new destination. When you move a parent page, the URLs for its subpages update automatically to reflect your changes.



- Click **Delete Page** to remove a page from the Pages menu. When you delete a parent page, its subpages are also deleted.
- Note: Not all pages have the Move Page, Add Subpage, and Delete Page options in the Page Actions menu. Review Considerations for Page Hierarchy and URL Conflicts in Experience Builder.

Click **+ New Page** at the bottom of the Pages menu to create a standard, object, or custom page.



Page Properties and Types in Experience Builder

Use the Page Action menu to view and edit the properties of the pages that make up your Experience Builder site.

Considerations for Page Hierarchy and URL Conflicts in Experience Builder

When you create and organize pages in your Experience Builder site, some pages behave differently than others. Keep these page management considerations in mind when you use the Page Action menu.

Enable the App Launcher in Experience Builder Sites

Display the App Launcher in Experience Builder Sites to make it easy for members to move between their sites and their Salesforce org. This functionality is available in any site based an Experience Builder site template or Lightning Bolt solution.

Inform Customers About Your Experience Builder Site Availability

Keep your customers informed when they can't immediately access your Experience Builder site. Customizable availability pages describe what's happening while customers wait for your site to load. The Service Not Available page lets them know when your site is down. When your site has higher-than-usual demand, the Too Many Requests page appears.

Edit Pages and Components in Experience Builder

Each page contains a collection of components that are organized around a task or function, whether it's opening a case or searching for an article. The pages that comprise each Experience Builder template are ready for you to use with little configuration. Add new components to your site's pages, edit the properties of existing components, or delete components that you don't require.

Create Custom Pages with Experience Builder

Create custom pages to extend your Experience Builder template. Add custom record detail, list, and related list pages to get the most from your Salesforce data.

Add Markup to the Page <head> to Customize Your Experience Builder Site

Add custom analytics, improve your SEO results, and more by adding custom markup to the page `<head>` in Experience Builder. For example, you can include SEO meta tags that are visible only to search engines, add a *favicon*, or add custom code for Adobe Analytics and Google Tag Manager.

Expression-Based Component Variations in Enhanced LWR Sites

Site visitors are important to your business and deserve to have the most custom experience possible. With Expression-Based Component Variations, you can create multiple versions of a component and then change the style and visibility settings to make each version unique. You can choose to have a single variation for a targeted group or several variations that apply broadly to subsets of your users. Apply visibility rules to each variation to make it appear to the appropriate site visitors. And when you have multiple variations for the same component, prioritize them so you know when your variations appear and to whom.

Expression-Based Visibility in Enhanced LWR Sites

With Expression-Based Visibility, you can create a set of rules that dictate when and to whom your components in your enhanced LWR sites appear. Choose visibility settings based on User and Product object fields such as location, language, buyer groups, and more. Creating visibility conditions based on expressions improves the agility of your site.

Personalization with Audience Targeting in Aura Sites

Keep your users engaged by offering personalized, relevant content that's customized for a particular audience. To create an audience, you assemble a set of criteria that defines a user segment. You can then tailor a single site to meet the needs of multiple user segments. For example, you can present the same site with a different look and feel for each audience or show different pages, components, or data to different audiences.

Use Visualforce in Experience Builder Sites

If you created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based sites, you can use them in Experience Builder sites.

Add Streams to Your Experience Builder Site

Your site users can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to get a sense of what people are saying. Each member can create up to 100 streams.

Page Properties and Types in Experience Builder

Use the Page Action menu to view and edit the properties of the pages that make up your Experience Builder site.

Page Types

Experience Builder sites comprise several types of pages.

Standard Pages
The default pages that come with the Experience Builder template or that you create.

Object Pages
The pages of the objects in your site, which include the object's record detail, list, and related list pages.

Generic object pages are used to display record information for a Salesforce object when custom object pages don't exist.

Content Pages
The content pages that you create to display your Salesforce CMS content.

Login Pages
The default login pages that come with the Experience Builder template.

Page Properties

To edit a page's properties, open the Pages menu in Experience Builder. Then, click ••• to open the Page Action menu and select **Page Settings**. The properties available to each page depend on the selected page type.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

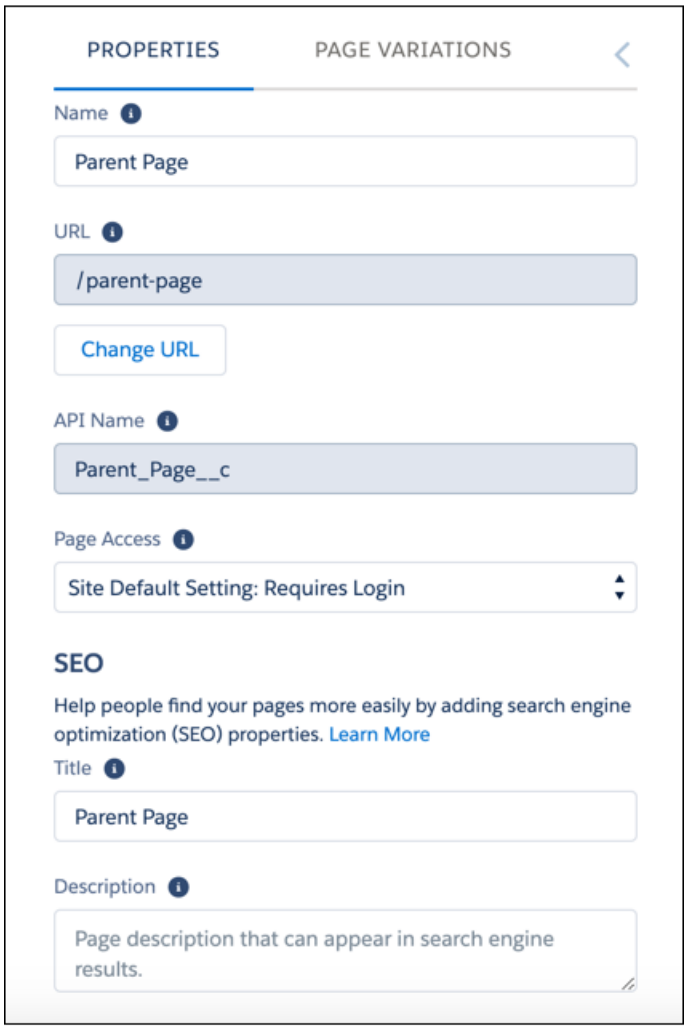
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

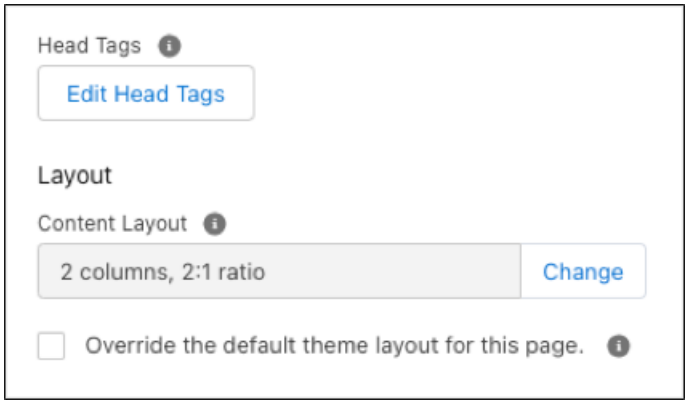
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site





Name

The name of the page as it appears in Experience Builder. Editable only in the standard pages that you create.

URL

The URL of the page. Editable only in custom standard pages.

Manage the URLs for each page after creating your page hierarchy. Anytime you move pages around and alter the page hierarchy in your site, the subpage URLs automatically update to reflect your changes.

Note: The site URL for each page reflects the structure you set up in Experience Builder when you share the live site with your users.

Note: Some pages can't be moved. Review Considerations for Page Hierarchy and URL Conflicts in Experience Builder.

API Name

A unique name you define when you create a page.

Page Access

Specifies the level of access to the page. When you enable public access, guest users can view asset files on public pages by default. More restrictive profile settings can prevent certain users from viewing this page, even if you choose Public. Page access for some pages, like My Account, is automatically set to require users to log in and can't be modified.

When you enable public access, the preference **Let guest users view asset files and CMS content available to the site** in **Administration** > **Preferences** is automatically enabled.

Title

The SEO title of the page. Shown in search engine results, the browser's tab or window title, and bookmarks.

For data-based pages, such as object and content pages, the title is set dynamically.

Description

The SEO description of the page. Shown in search engine results to help people decide if this page is the one they want.

For data-based pages, such as object and content pages, the description is set dynamically.

Head Tags

Provides the opportunity to enter specific `meta` tags for the page to assist search engine optimization for your site.

For data-based pages, such as object and content pages, you can enter expressions to access values from the record associated with the page, such as the name, title, and value of specific fields.

Content Layout

Defines the content regions of your page, such as a two-column layout.

Theme Layout

By selecting **Override the default theme layout for this page**, you can choose to apply a different theme layout for the page.

SEE ALSO:

Change the Theme Layout of Your Experience Cloud Site's Pages

Change the Content Layout in Experience Builder

SEO for Experience Builder Sites

Experience Cloud Developer Guide: Create Custom Content Layout Components for Experience Builder

Considerations for Page Hierarchy and URL Conflicts in Experience Builder

When you create and organize pages in your Experience Builder site, some pages behave differently than others. Keep these page management considerations in mind when you use the Page Action menu.

Page Level Limits

You can have up to six levels of pages when you use the Page Action menu to add subpages or move pages. Because of this limit, the option to add a subpage or move a page within your page hierarchy is disabled from the Page Action menu.

When you create an object page, a page base (1) is created on one level, and the Detail, List, and Related List subpages (2) are created on a second level. When you create a content page, its Content Detail subpage is also on the second level.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

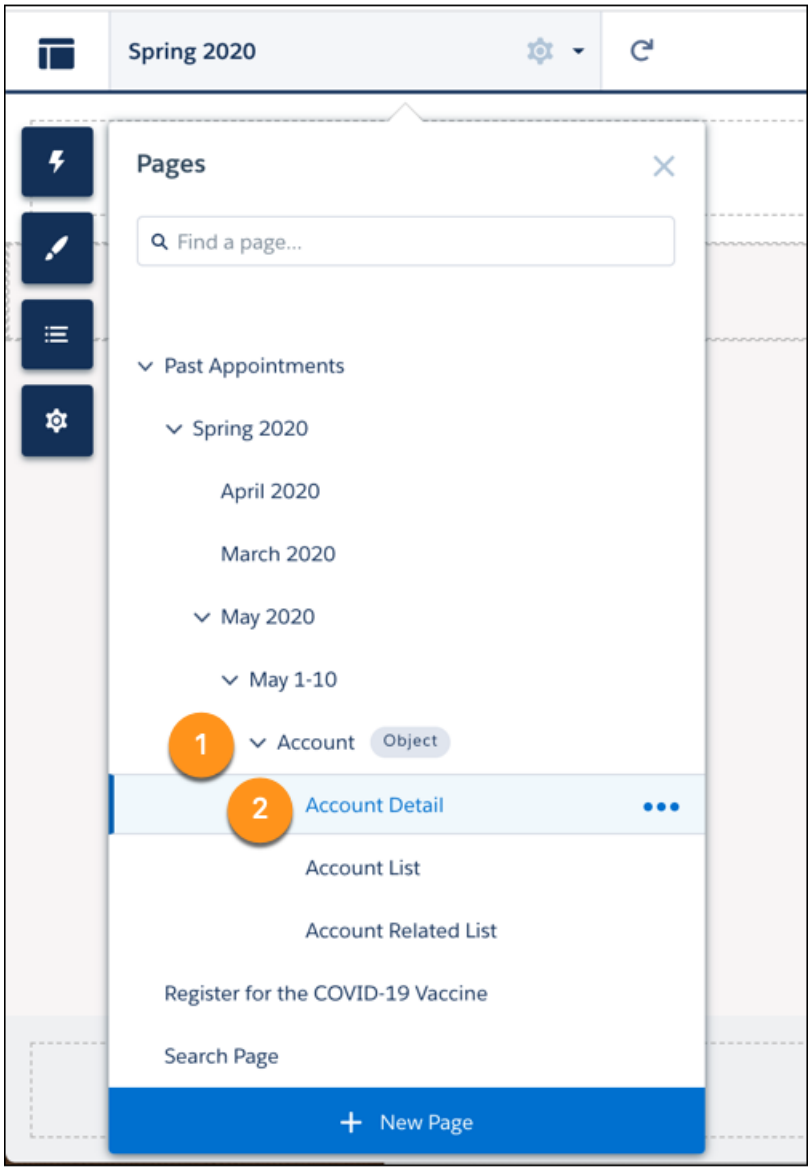
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

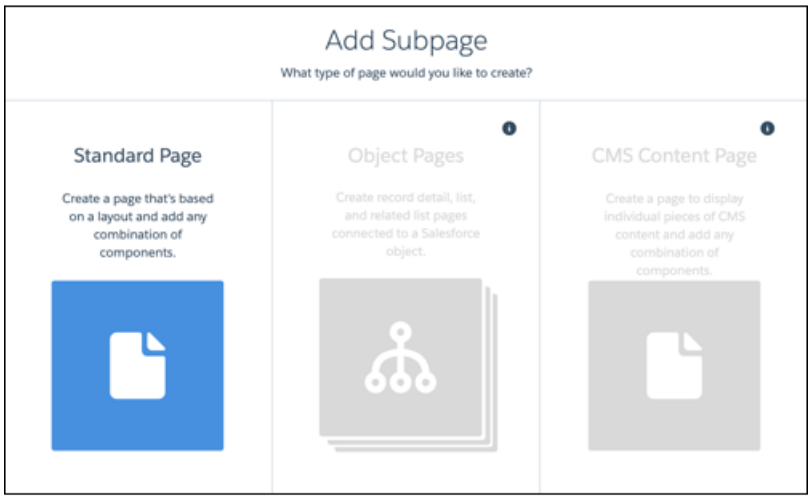
- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

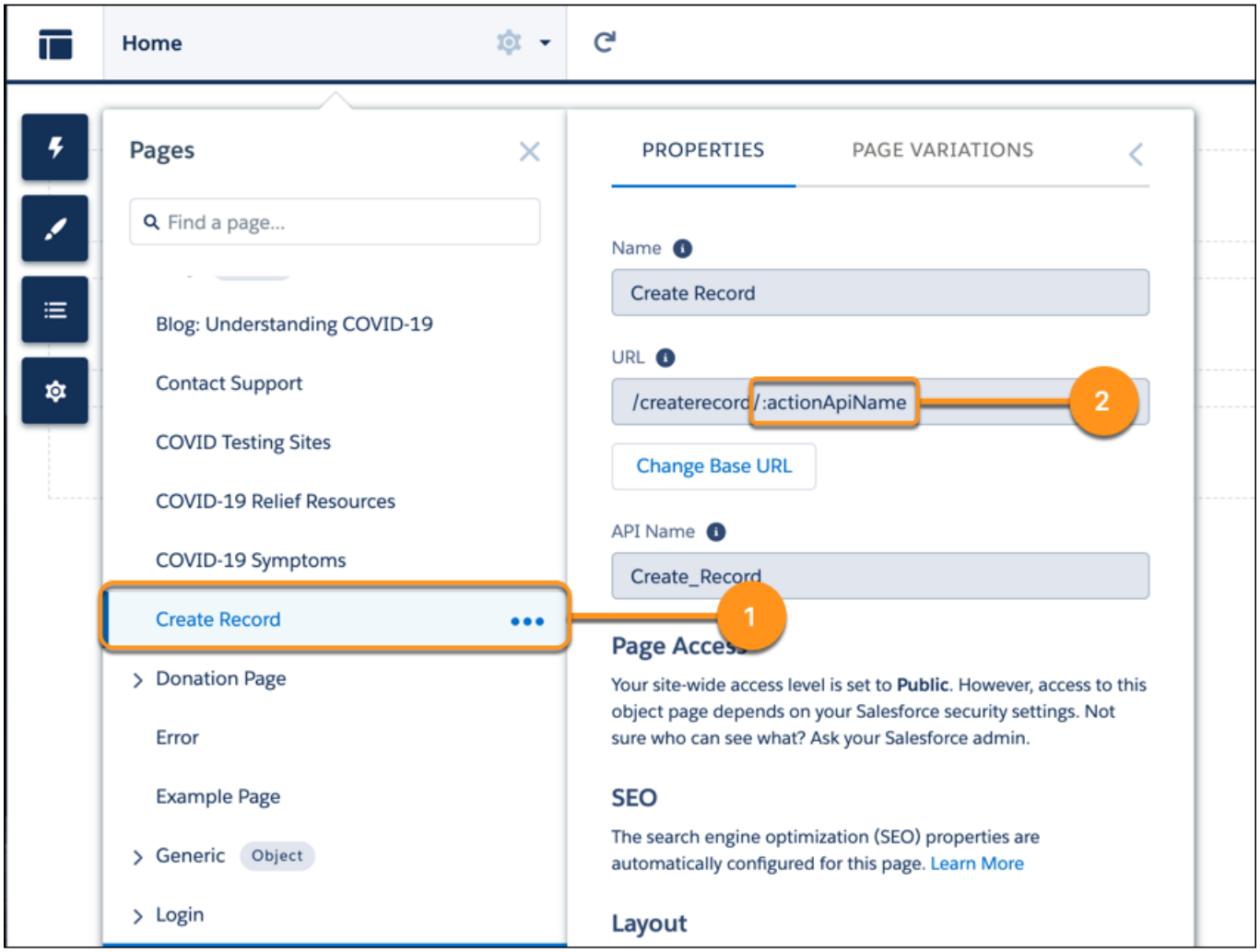


Because object and content pages take up two levels, adding them under the fifth level of an existing hierarchy exceeds the level limit of six pages. When a page is on the fifth level of the page hierarchy, you can only add a standard page as a subpage. The object and content pages are disabled and can't be added.



Dynamic URL Conflicts

Some preconfigured pages (1) in your site contain a dynamic portion in the page URL, indicated with specific parameters (2).



To avoid URL conflicts, the Add Subpage option is always disabled for these pages, and other pages can't be moved under them.

URL Conflicts Between Sites

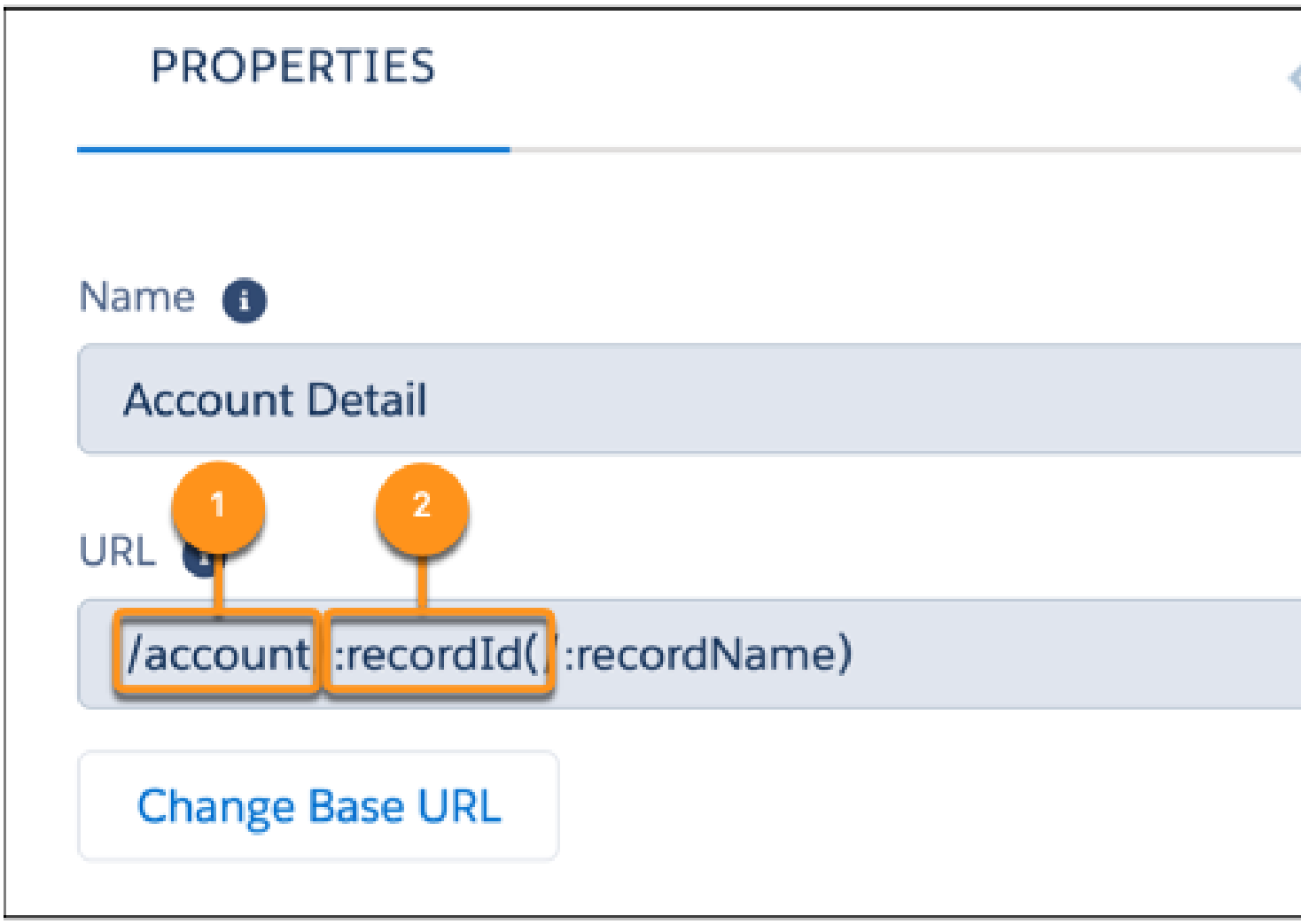
If you host multiple sites on the same Salesforce-managed domain, be sure to review your site URLs for conflicts, as it's possible to configure the same URL for pages on two different sites.

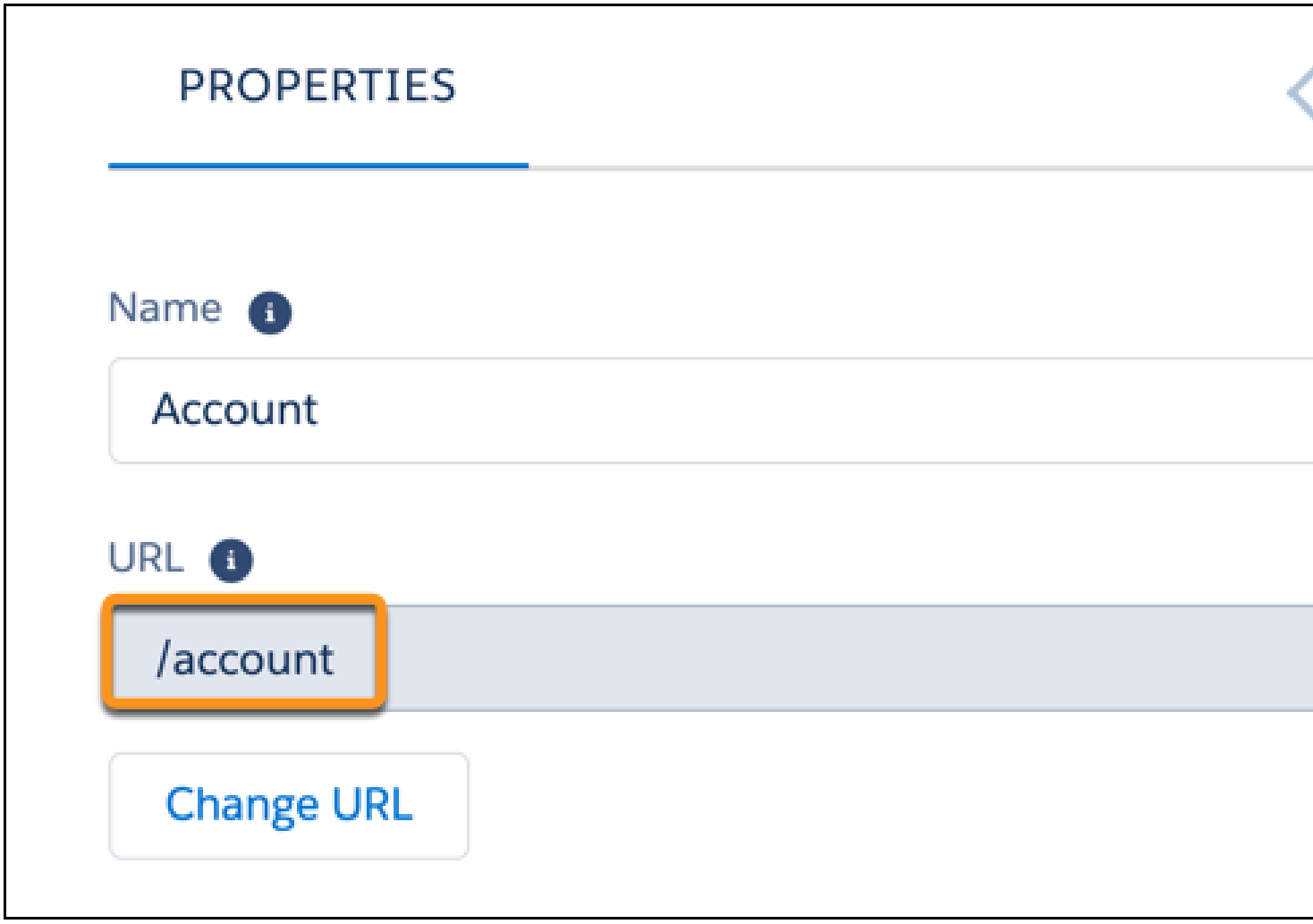
Let's say you use `https://ExperienceCloudSitesSubdomain.force.com` for Site A's homepage, and `https://ExperienceCloudSitesSubdomain.force.com/products` for Site B's homepage. If you create a page on Site A that uses the subpath `/products`, that page and Site B's homepage both use the URL `https://ExperienceCloudSitesSubdomain.force.com/products`.

In this scenario, a site visitor can only access the Site A page through a navigation menu on Site A. If a site visitor navigates to `http://ExperienceCloudSitesSubdomain.force.com/products` any other way, they're directed to Site B's home page.

General URL Conflicts

A page that exists at the same level as another page with the same base URL (1) and has a dynamic URL (2) can't have subpages.


PROPERTIES
Name
Account Detail
1
2
URL
/account
:recordId(
:recordName)
Change Base URL

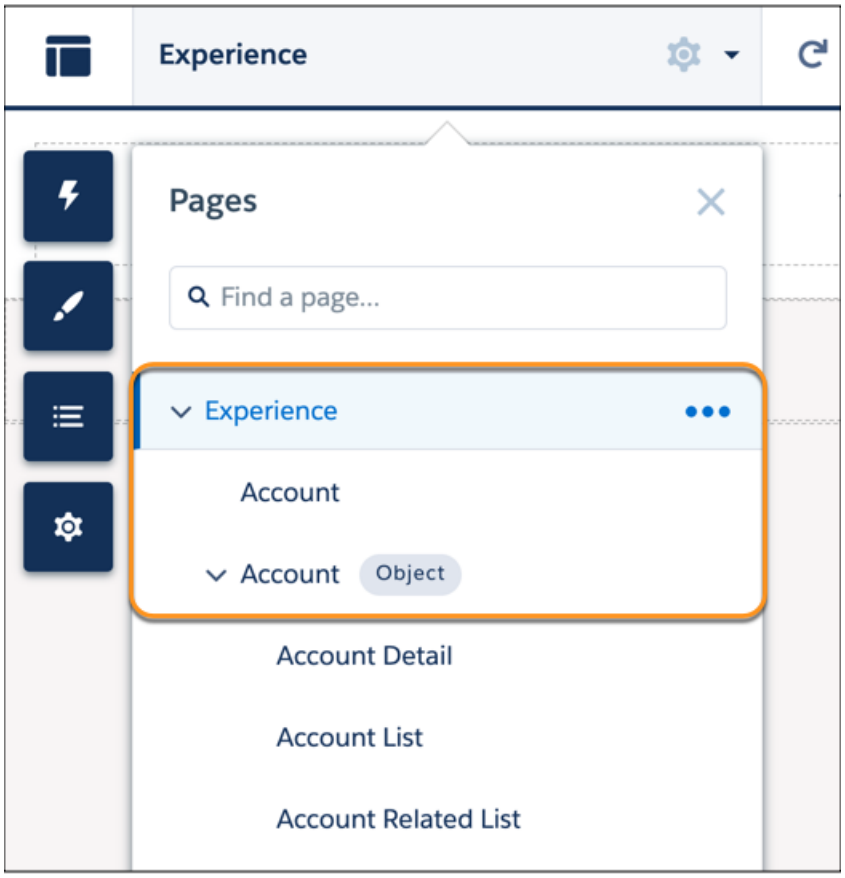


In this example, the Account standard page and the Account object page have the same base URL, /account/. To prevent URL conflicts, the Add Subpage feature is disabled for the Account standard page.

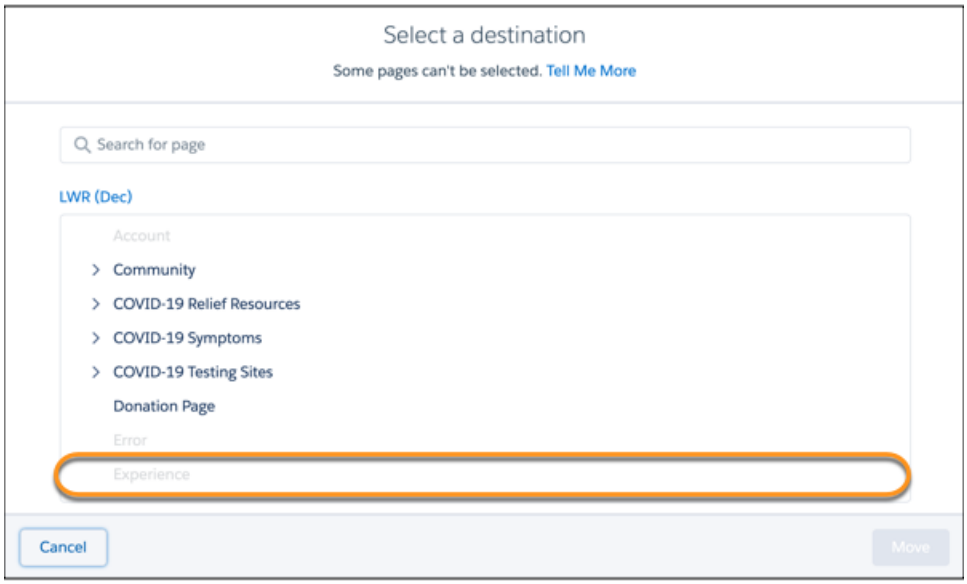
Tip: To add a subpage when this feature is disabled for a standard page, you can change either page's base URL. To change the standard page's base URL, first, go to Page Settings from the Page Action menu, then click **Change URL**. You can also change the other conflicting page's URL because all related subpages are updated with the new URL.

Now let's say the Account standard page is a subpage of another standard page in your site.

When the Account standard page has no subpages of its own, you can move the Account object page under the Experience page as an immediate subpage. Here, the Account standard and Account object pages can exist on the same level within a single page hierarchy.



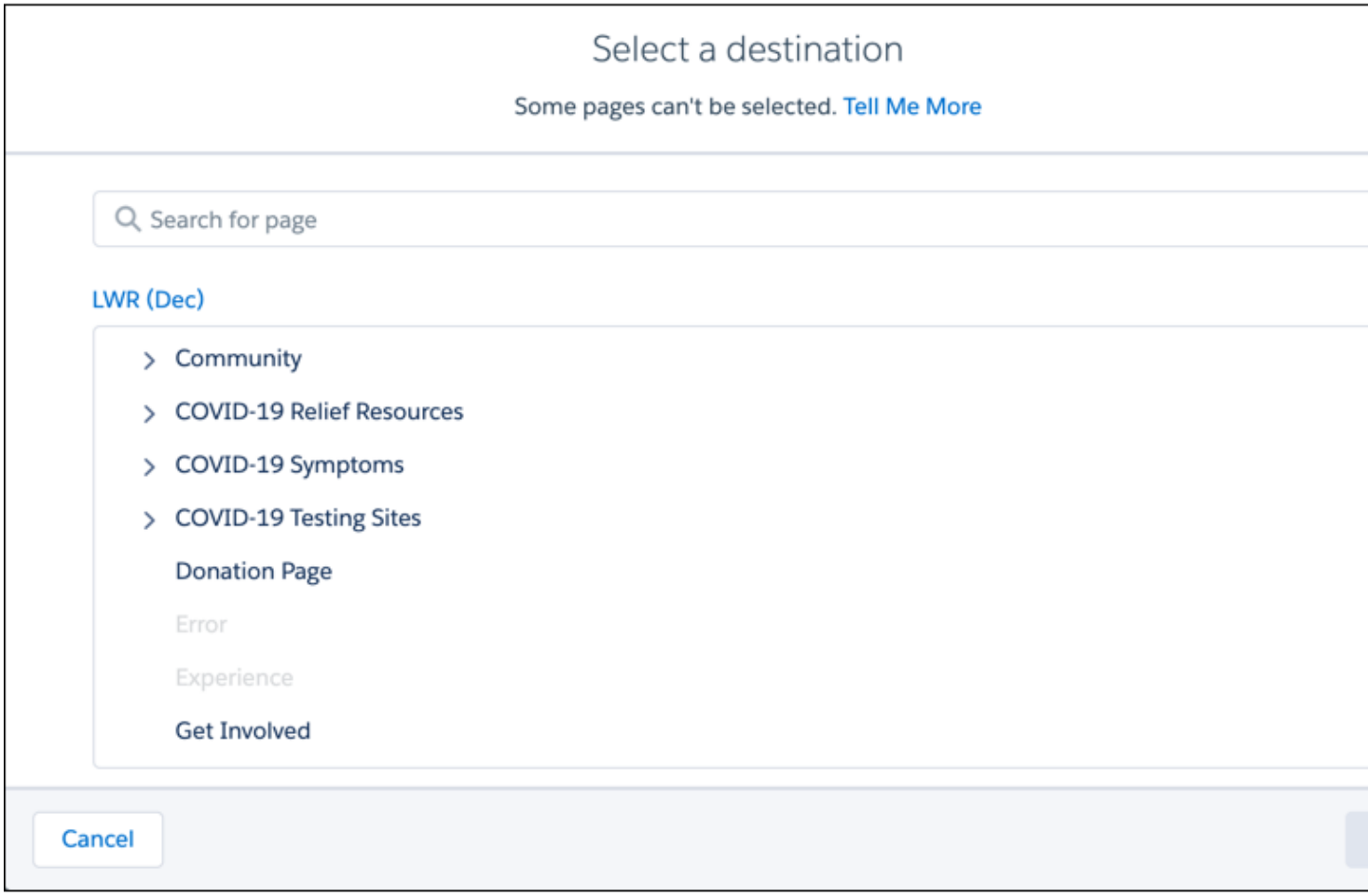
But if the Account standard page has a subpage, the Account object can't be in the same page hierarchy at the same level as the Account standard page. In this case, the base URLs of both pages conflict, which means that you can't move the Account object page under the Experience page. When you click Move Page for the Account object page, the Experience standard page and its subpages are disabled as destinations.



Note: The Add Subpage option is always disabled for pages with dynamic URLs, such as object and content pages, to avoid URL conflicts with their default subpages.

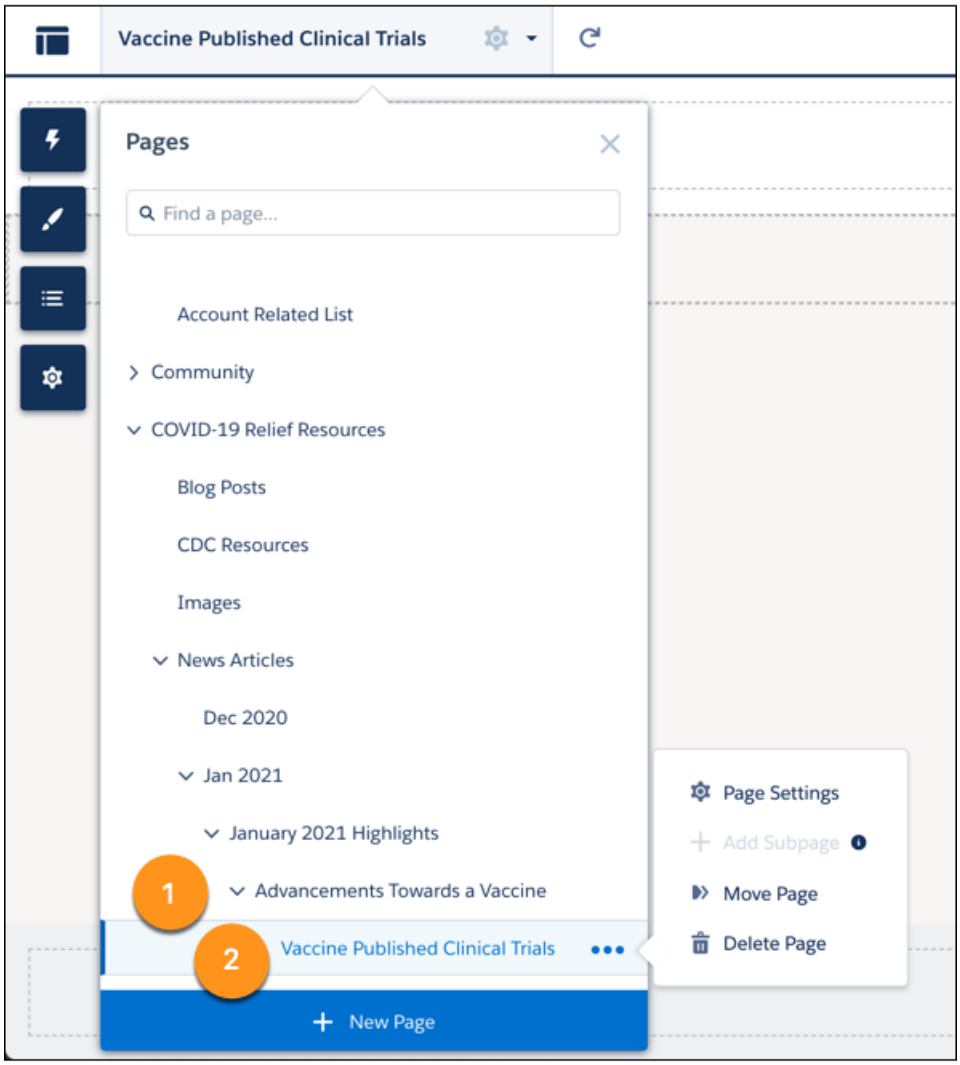
Move Page Conflicts

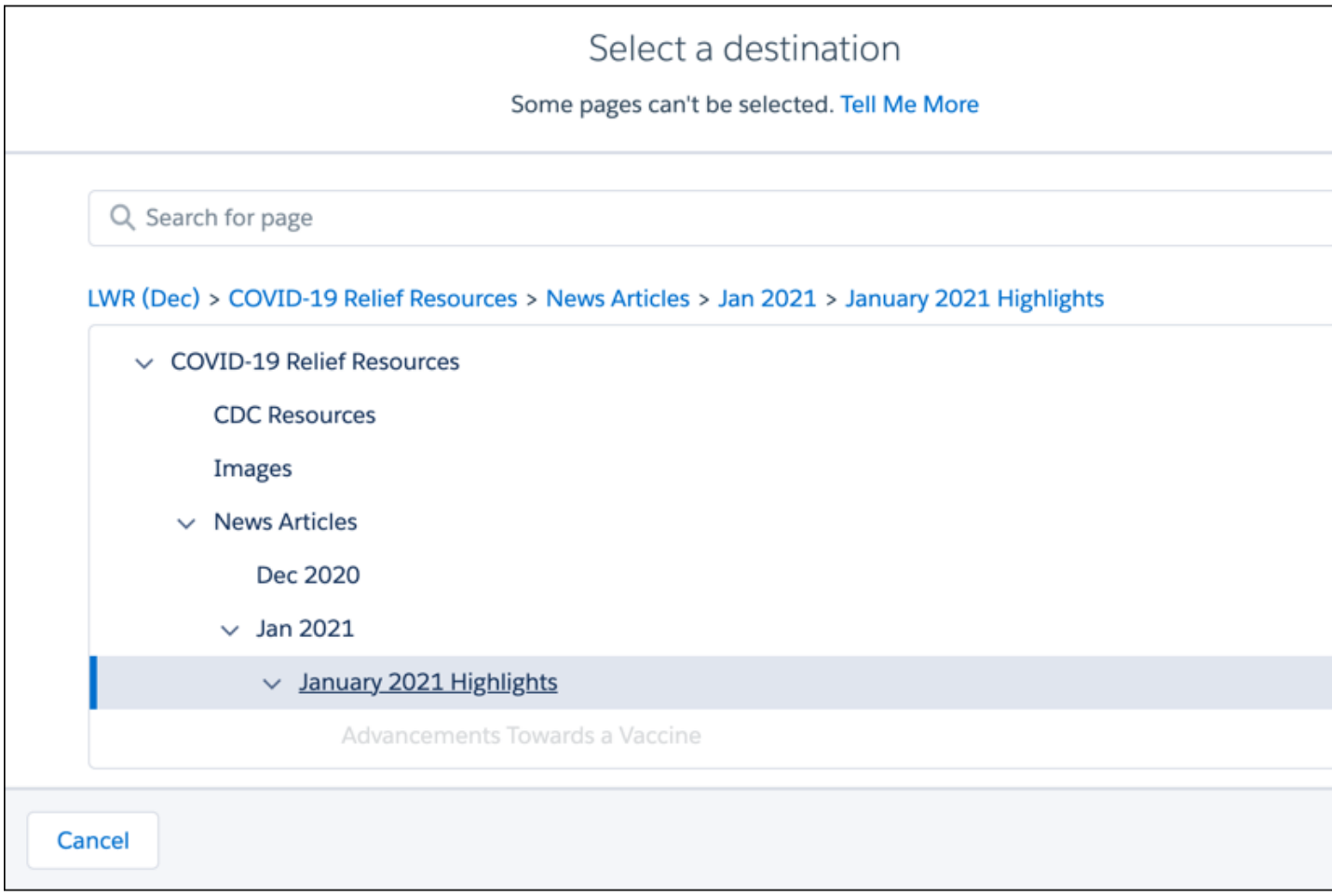
From the Select a destination dialog, you can select a parent page to move your selected page under. Some pages are disabled because they can't be parent pages for the page that you want to move.



Some possible reasons include:

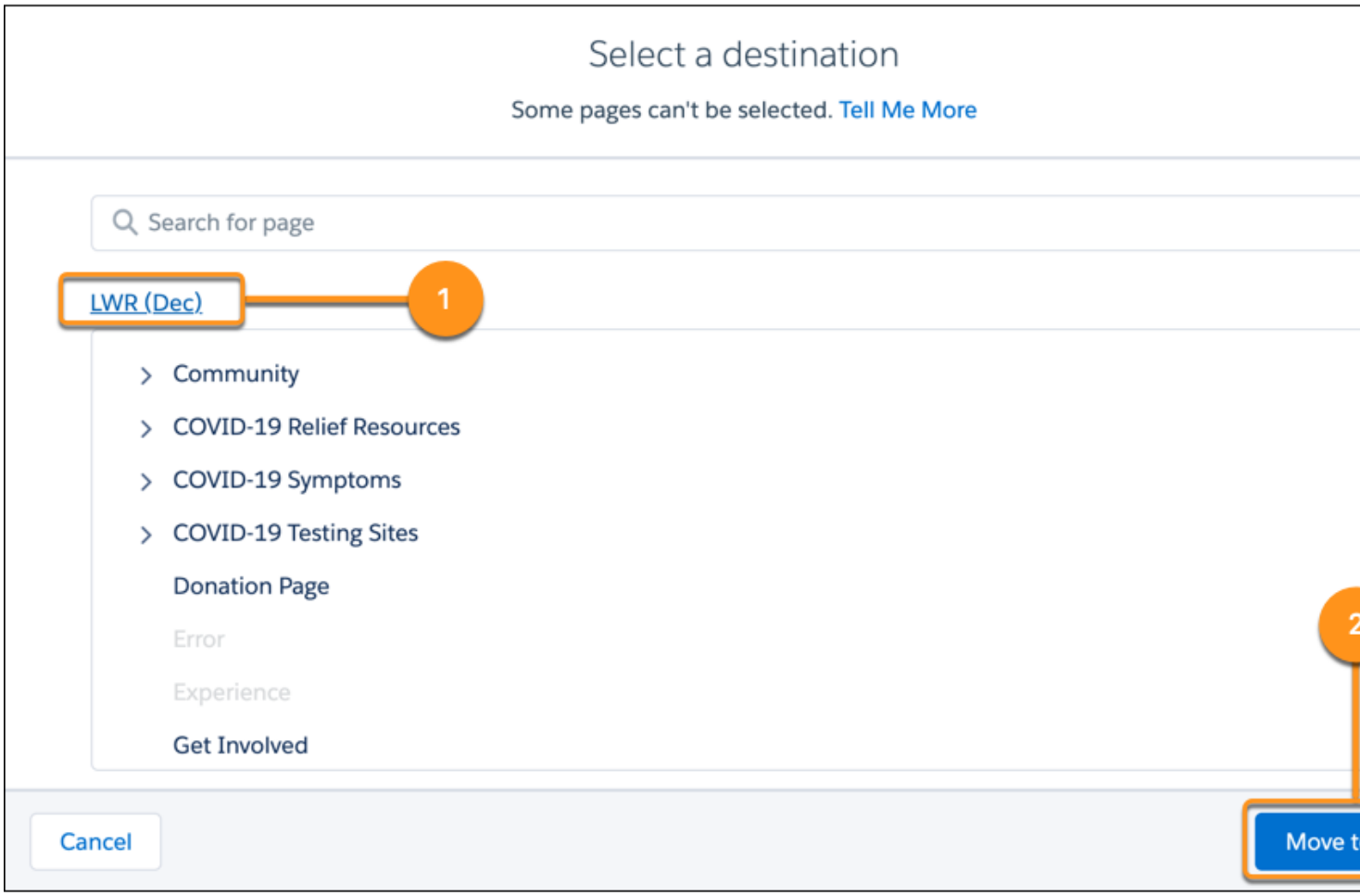
- Page Level Limits: You can't move a page under a parent page that results in a page hierarchy exceeding six levels. Say you want to move a page with a subpage, such as an object page, under a new parent page. You can only select a destination page up to the fourth level because the object page's current page hierarchy consists of two pages. Moving it to a fifth (1) or sixth (2) level page exceeds the six-level limit of the new parent page's hierarchy.


Vaccine Published Clinical Trials
Pages
Find a page...
Account Related List
Community
COVID-19 Relief Resources
Blog Posts
CDC Resources
Images
News Articles
Dec 2020
Jan 2021
January 2021 Highlights
1
Advancements Towards a Vaccine
2
Vaccine Published Clinical Trials
New Page
Page Settings
Add Subpage
Move Page
Delete Page



- URL conflicts: Review the suggestions in Dynamic and General URL Conflicts to easily move pages around in your site.
- Some pages are always top level and can't have subpages: Examples include the Home, Login, and Flow pages, as well as pages in the B2B template: Checkout, Flow, Order, and Confirmation. You can't move these pages or move other pages under them.

From the Select a destination dialog, you can move a page to the top level when you click the site name (1) and then click Move to Root (2).

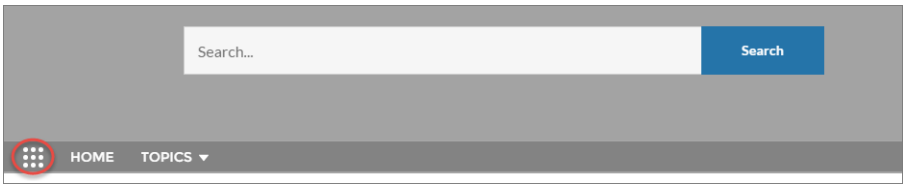


The Move to Root button is disabled if a page is already at the top level in your page hierarchy. It's also disabled when the page you want to move has a URL conflict with an existing top-level page.

Note: Review the suggestions under General URL Conflicts to move your page to the top level.

Enable the App Launcher in Experience Builder Sites

Display the App Launcher in Experience Builder Sites to make it easy for members to move between their sites and their Salesforce org. This functionality is available in any site based an Experience Builder site template or Lightning Bolt solution.



The App Launcher displays a tile for every app and published site (both Tabs + Visualforce and Experience Builder sites). Unlike in Lightning Experience, the All Items area and AppExchange link aren't available. Users see only the apps and sites that they're authorized to see according to their profile or permission sets.

The App Launcher is automatically enabled for new sites, but for older sites, you may need to enable it manually.

1. In Experience Builder, select the **Navigation Menu** component in the page you're configuring.
2. To display the App Launcher in existing sites, ensure **`Hide App Launcher in site header`** is deselected.
3. To let users see the App Launcher, ensure the Show App Launcher in Experiences Builder sites permission is enabled in user profiles in Setup. By default, this user permission is enabled for all standard profiles but it's not enabled for custom profiles. Enable this user perm on custom profiles or create a permission set.

Note: The App Launcher isn't available in Salesforce Tabs + Visualforce sites. Members who use Salesforce Tabs + Visualforce sites and Salesforce Classic can use the global header to switch between their sites and their Salesforce org.

SEE ALSO:

Switch Between Your Salesforce Org and Your Experience Cloud Sites

Enable the Global Header for Salesforce Tabs + Visualforce Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

To let members see the App Launcher:
- Show App Launcher in Experience Builder sites

To create, customize, or publish an Experience Builder site:
- Create and Set Up Experiences AND View Setup and Configuration

Inform Customers About Your Experience Builder Site Availability

Keep your customers informed when they can't immediately access your Experience Builder site. Customizable availability pages describe what's happening while customers wait for your site to load. The Service Not Available page lets them know when your site is down. When your site has higher-than-usual demand, the Too Many Requests page appears.

This feature is available for all sites that use the Salesforce CDN. The Salesforce CDN is enabled by default for sites that use enhanced domains. You can also configure custom domains to use the Salesforce CDN option.

Customize Availability Pages in Experience Builder

You can customize the layout and configure the colors, fonts, images, and sizes for the pages. Use the HTML Editor and Rich Content Editor to update the content (including language) and images.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites

The Service Not Available page has its own theme with a customizable header and footer. The Service Not Available page's theme is shared with the Too Many Requests page. Some standard Experience Builder features aren't available for these pages, such as SEO settings, public page settings, and progressive rendering. Custom components aren't available for these pages.

You have different configuration options, depending on whether you're using an Aura or LWR site. If you're using an LWR site, you can update the page layout from a single column. If you're using an Aura site, you can only use a single column for the layout. Audiences and Page Variations features of Aura sites aren't available for this page.

To access the availability pages in Experience Builder:

- From Setup, enter `Digital Experiences` in the Quick Find box, and then select **All Sites**.
- Click **Builder** next to the site you want to access.
- Click the Pages menu, and then choose **Service Not Available** or **Too Many Requests**. To make the page available for use, click **Publish**.

Use a Custom Service Not Available Page for Your Experience Builder Site

Maintain business continuity with customers and allow them to log cases when your site is down using the Service Not Available page in Experience Builder.

Use a Custom Too Many Requests Page for Your Experience Builder Site

When your site's performance is impacted by high traffic, the Too Many Requests page displays a customizable message to let customers know they'll be redirected momentarily. The page automatically refreshes to check when the site is working and redirects customers to the site when it's available.

Use a Custom Service Not Available Page for Your Experience Builder Site

Maintain business continuity with customers and allow them to log cases when your site is down using the Service Not Available page in Experience Builder.

This feature is available for most sites that use Salesforce's CDN for Digital Experiences. The Salesforce CDN is enabled by default for sites that use enhanced domains. You can also configure custom domains to use the Salesforce CDN option.

EDITIONS

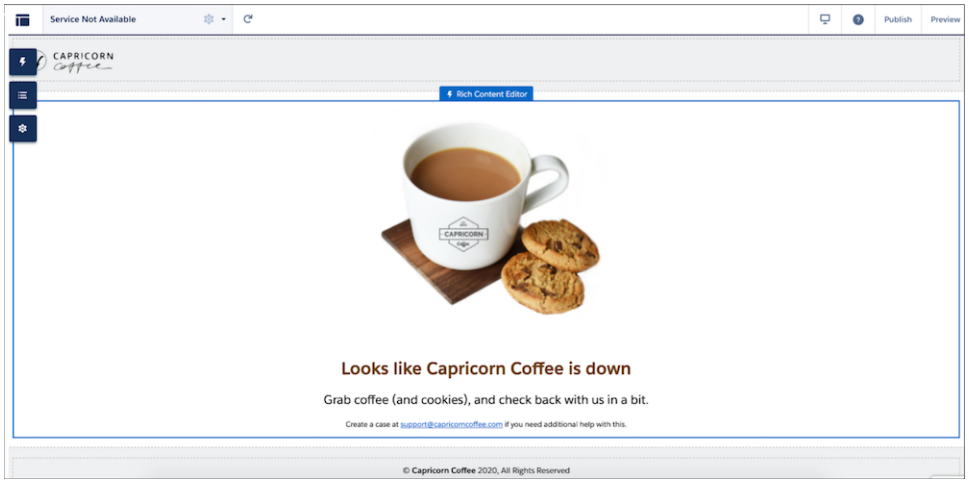
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites

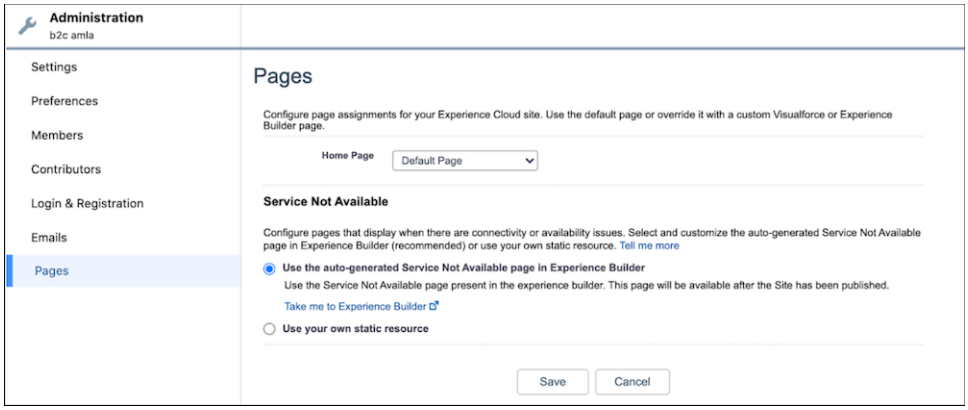
The Service Not Available Page in Experience Builder

The Service Not Available page is an offline page. It only appears when a site isn't available. When the site is up and running, the Service Not Available page has no impact on the user's experience of the site.



The Service Not Available page is enabled by default, unless you're using your own static resource. To enable the Service Not Available page instead of using your own static resource:

1. Click the Experiences Menu icon.
2. Select **Administration** > **Pages**.
3. Check the radio button next to **Use the auto-generated Service Not Available page in Experience Builder** and save your changes.
4. To make it available for use, publish the page.



Note: Custom pages named Service Not Available prevent Salesforce's standard Service Not Available page from automatically migrating to your org. To replace a custom page named Service Not Available with Salesforce's standard Service Not Available page, rename the conflicting custom page. Contact Salesforce Customer Support if you need further assistance.

Service Not Available Page in ExperienceBundle

The Service Not Available Page also exists as a service-not-available route type in ExperienceBundle. Developers must update their file in order to avoid getting an error on missing this route type.

Maintain Business Continuity with Email-to on the Service Not Available Page

To allow users to log cases when the site is down, you can enable Email-to-Case on your Service Not Available page. First set up Email-to-Case, then encourage your users to use the configured email to submit cases using your Experience Builder Service Not Available page. You can also enable users to create additional records from your Service Not Available page, beyond cases, using Email-to-packages found on AppExchange.

Maintain a Consistent Experience Between Your Experience Builder and Visualforce Sites

You can display the same Service Not Available page on your Experience Builder and Salesforce Tabs + Visualforce sites. After you've customized your page in Experience Builder and have published it to your site, it automatically becomes a static resource for your org.

The Service Not Available static resource:

- Must be a public .zip file 5 MB or smaller.
- Must contain a page named `maintenance.html` at the root level of the .zip file. Other resources in the .zip file, such as images or CSS files, can follow any directory structure.
- Must contain only files that have file extensions.

To use the page on your Visualforce site:

1. Open **Experience Workspaces** or **Experience Management**.
2. Navigate to **Administration** > **Pages**.
3. Click next to Service Not Available to search for the Service Not Available static resource generated for your Experience Builder site. Upload it as a static resource.
4. Save your changes.

Service Not Available Page and the Salesforce Edge Network

If your site uses the Salesforce Edge Network, the Service Not Available page appears when the Salesforce servers are down whether you've enabled enhanced domains or not. However, if you deactivate your site or take it down for maintenance, the Visualforce Maintenance page appears for sites that aren't using enhanced domains.

SEE ALSO:

Set Up Email-to-Case

Use a Custom Service Unavailable Page in Your Salesforce Tabs + Visualforce Site

Use a Custom Too Many Requests Page for Your Experience Builder Site

When your site's performance is impacted by high traffic, the Too Many Requests page displays a customizable message to let customers know they'll be redirected momentarily. The page automatically refreshes to check when the site is working and redirects customers to the site when it's available.

This feature is available for most sites that use Salesforce's CDN for Digital Experiences. The Salesforce CDN is enabled by default for sites that use enhanced domains. You can also configure custom domains to use the Salesforce CDN option.

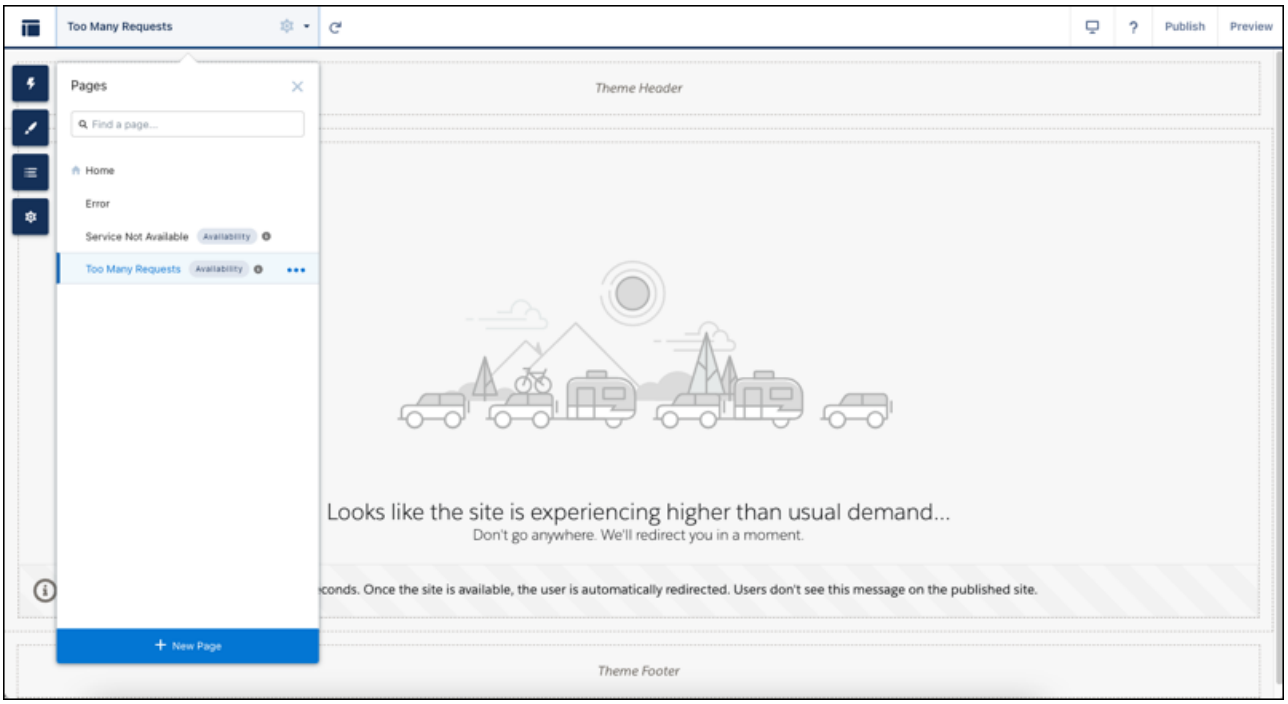
The Too Many Requests page shares a theme layout with the Service Not Available page. Use the HTML Editor and Rich Content Editor components to customize the page.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites



The Page Refresh component automatically refreshes the page for your customers. This component is built into the page by default.

SEE ALSO:

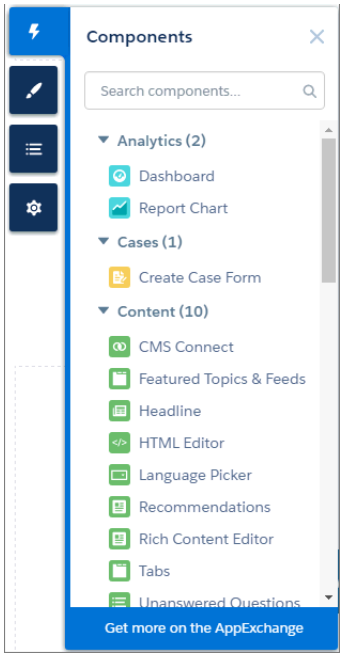
- Edit Pages and Components in Experience Builder
- HTML Editor
- Rich Content Editor
- Page Refresh
- Use a Custom Service Not Available Page for Your Experience Builder Site

Edit Pages and Components in Experience Builder

Each page contains a collection of components that are organized around a task or function, whether it's opening a case or searching for an article. The pages that comprise each Experience Builder template are ready for you to use with little configuration. Add new components to your site's pages, edit the properties of existing components, or delete components that you don't require.

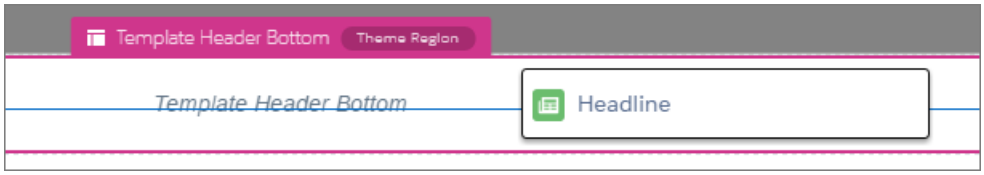
Tip: If you plan to add components to a new custom page, spend some time planning the composition of the page based on its purpose.

1. From the Pages menu in the top toolbar, select the page that you want to edit.
2. To open the Components panel, click .



The Components panel lists only components that are compatible with the selected page. For example, you can't add the User Profile Detail component to the Home page.

3. Drag the required component from the Components panel onto an editable area of the page. When you drag a component over a content or theme layout region, a label appears to help you identify the region. Components in theme layout regions are shared everywhere that theme layout region is used and we add the label "Shared" to the component name. Components in a content layout region are specific to the page.



4. To edit the properties for a component on the page, select it on the main page canvas or on the Page Structure panel.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

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- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

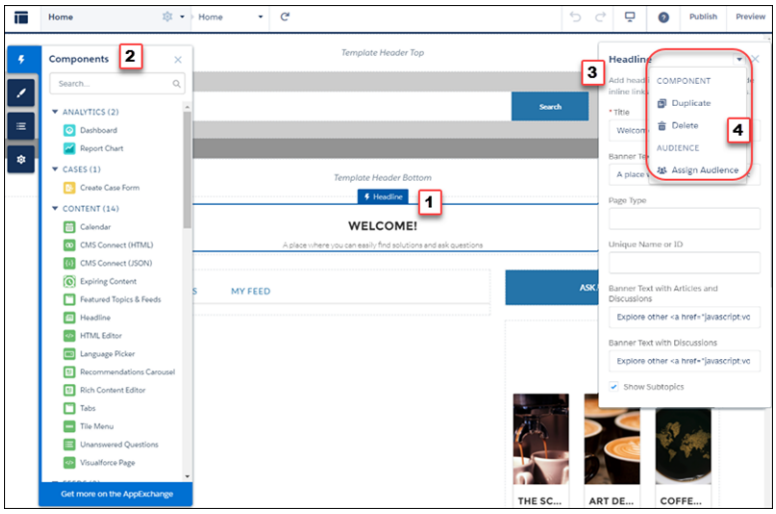
  OR

- Be a member of the site AND an experience admin or publisher in that site

When you select a component, Experience Builder highlights the component with a blue border and displays the component's properties in the floating property editor.

5. Update the component as required.

Example: Here's a sample configuration of the Headline component (1) on the Home page with the list of supported Lightning components (2) and properties (3). You can also quickly duplicate, delete, or assign an audience to the component to control its visibility (4).



Tip:

- You can browse a selection of custom Lightning components on AppExchange and add them to your org directly from Experience Builder. Click **Get more on the AppExchange** in the Components panel. Components that are ready to add to Experience Builder pages are displayed. When you add a component, it appears in the Components panel of all the template-based sites in your org.
- You can also create custom Lightning components and use them on Experience Builder pages. For more information on creating custom Lightning components and enabling them for Experience Builder, see the Experience Cloud Developer Guide.

Assign Different Values for Desktop, Tablet, and Mobile Properties in Custom LWR Components

Custom Lightning components, in enhanced LWR Experience Cloud sites, can have different integer and string property values for different screen sizes. With screen-size responsive properties, the component uses the correct property value based on the end user's screen size. For example a string property can be used to set the alignment of text or a child component. By making that property screen-size responsive, the component can have different alignment depending on the current screen size.

Show or Hide Components on Mobile, Tablet, or Desktop for Enhanced LWR Sites

Improve the readability of your site by hiding unnecessary components. In enhanced LWR sites, site builders can customize which components are shown or hidden for each device type—mobile, tablet, or desktop. Components are shown by default.

Hide Components on Mobile Devices with Experience Builder for Aura Sites

Reduce page load times and cluttered mobile screens by hiding non-business critical components on mobile devices. View your Aura site in Builder using the mobile mode and select which components you wish to hide.

Error Messages for Pages Without Data in Experience Builder

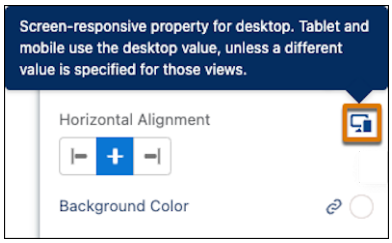
When you use Lightning components to build a template-based page in Experience Builder, sometimes the page doesn't load correctly on your site. Find out why this error happens, and how you can fix it. Make sure that the component has underlying data.

Assign Different Values for Desktop, Tablet, and Mobile Properties in Custom LWR Components

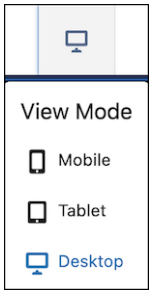
Custom Lightning components, in enhanced LWR Experience Cloud sites, can have different integer and string property values for different screen sizes. With screen-size responsive properties, the component uses the correct property value based on the end user's screen size. For example a string property can be used to set the alignment of text or a child component. By making that property screen-size responsive, the component can have different alignment depending on the current screen size.

Note: This feature is available for only enhanced LWR sites.

1. Ensure that your custom Lightning component developer has programmatically declared which component properties are screen-responsive.
2. In Experience Builder, select the custom component in the page that you're configuring.
3. In the component's property editor, properties that are screen-size responsive are indicated by an icon.
   Hover over the icon for more information.



4. Specify the property value for the current view mode.
   By default, property values set for the larger screen sizes are inherited by the smaller screen sizes.
5. If you want to use a different property value for a view mode, switch between the view modes and then specify the property value for that current view mode.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Enhanced LWR sites

USER PERMISSIONS

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To publish an Experience Cloud site:

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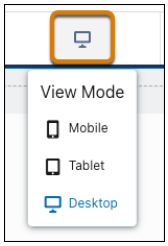
SEE ALSO:

LWR Sites for Experience Builder: Make a Custom LWR Component Screen-Size Responsive

Show or Hide Components on Mobile, Tablet, or Desktop for Enhanced LWR Sites

Improve the readability of your site by hiding unnecessary components. In enhanced LWR sites, site builders can customize which components are shown or hidden for each device type—mobile, tablet, or desktop. Components are shown by default.

1. In Experience Builder, click **View Mode** in the top navigation bar.



2. Select the view to customize.
3. On the canvas, select the component. The component property panel opens for the selected view mode.
4. Click the **Visibility** tab.
5. Turn on **Show Component** to show or edit it. Turn it off to hide the component.
   Your selection applies only to the selected view mode. It doesn't affect the other view modes.
6. Repeat these steps for all components that you want to customize and for each applicable view mode.
7. To make sure the components are shown or hidden as expected, preview your site.
8. Click **Publish**.

When you click a component in the Page Structure panel, Experience Builder scrolls the canvas to show the component and open its property panel. When you click a component on the canvas, Experience Builder scrolls the Page Structure panel to show the selected component there.

To locate hidden components in the Page Structure panel, from the Show dropdown list, select **Hidden Components**. You can unhide a component directly from the panel by clicking the eye icon beside the component's name.

Note: The Hidden Components option in the Show dropdown list and the eye icon apply to components hidden via the Show Component toggle on the component property panel. These indicators don't apply to components hidden via expression-based visibility settings.

EDITIONS

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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

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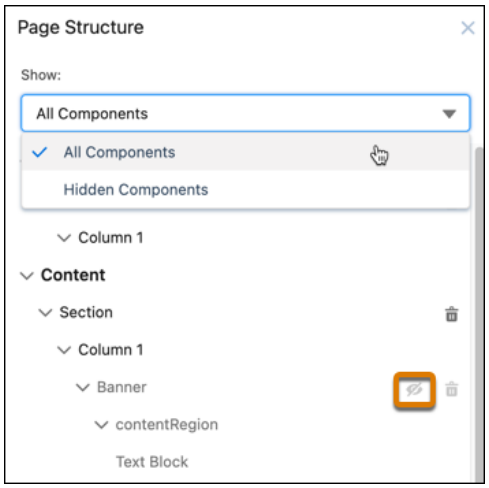
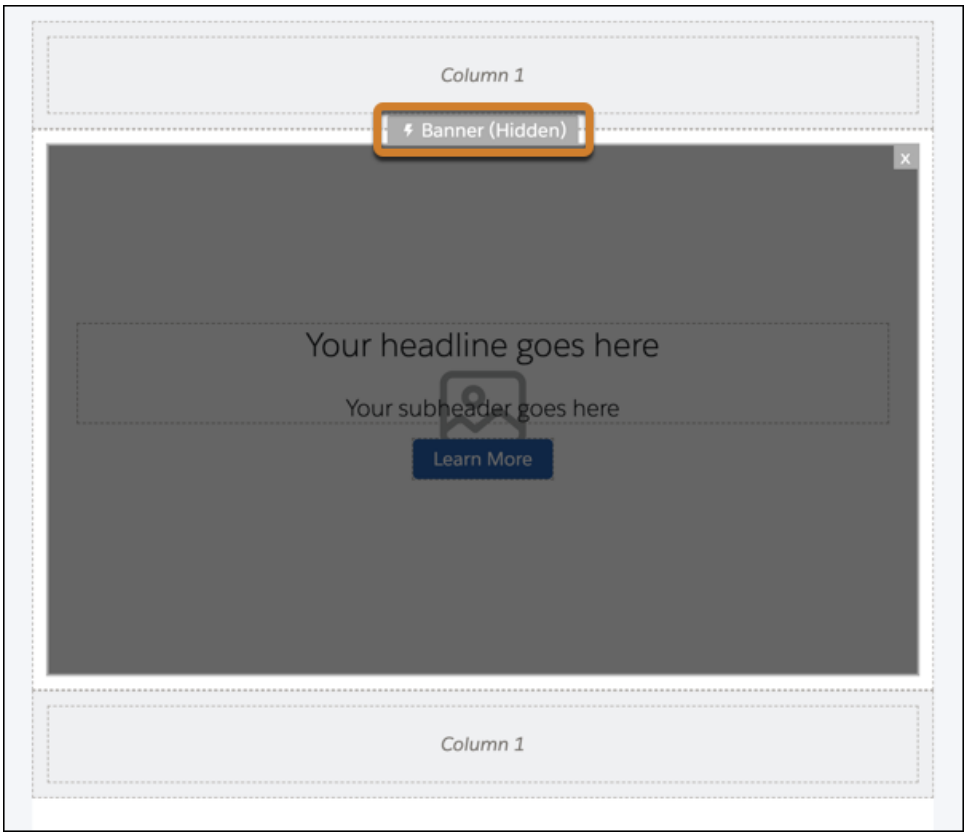


When you hide a component, the canvas shows an overlay of the component and identifies it as hidden.



You can also hide components with expression-based visibility settings.

SEE ALSO:

Expression-Based Visibility in Enhanced LWR Sites

Hide Components on Mobile Devices with Experience Builder for Aura Sites

Reduce page load times and cluttered mobile screens by hiding non-business critical components on mobile devices. View your Aura site in Builder using the mobile mode and select which components you wish to hide.

1. In Experience Builder, change the view to Mobile.
2. Click the component you want to hide to open the properties panel.
3. Scroll to the bottom of the panel and click **Hide on Mobile**.

Note:

- You can hide or show components by clicking **Page Structure**, and clicking the eye icon next to the component. The Page Structure button also displays the number of hidden components.
- You can't hide components in an area that's shared across different pages on a site, even if you've chosen to hide a component. Let's say your site is using a default theme, and the header is shared across all the pages. Any component included in the header is visible on all site pages, even if you choose to hide some components on some pages.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

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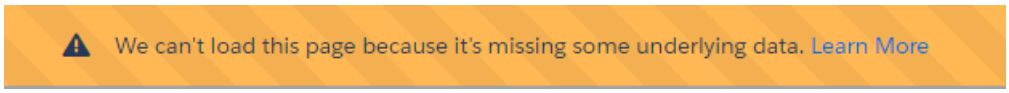
Error Messages for Pages Without Data in Experience Builder

When you use Lightning components to build a template-based page in Experience Builder, sometimes the page doesn't load correctly on your site. Find out why this error happens, and how you can fix it. Make sure that the component has underlying data.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

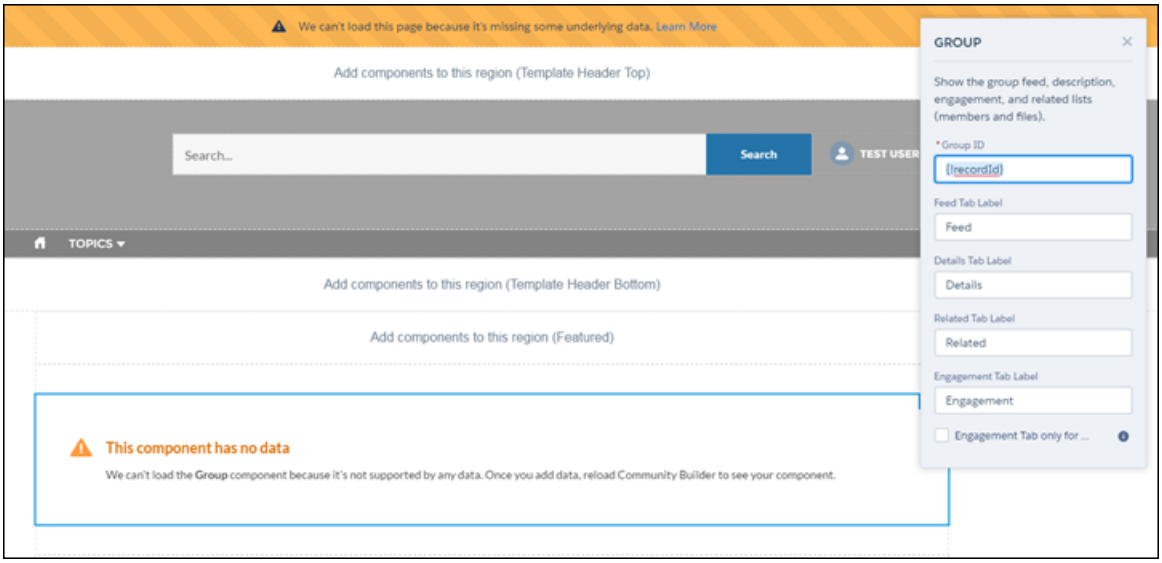
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



An error occurs on site pages in one of the following three instances:

- The page has no components
- The page has one or more components, and one or more have no underlying data
- Your org has SEO-friendly URLs enabled, but there's no URL slug specified for the object type

You see this error when components rely on dynamic data, and they don't find any underlying data to draw upon. For example, a Group component that doesn't find a group ID, or a record that can't find a record ID would both give you an error.



Why do I see this error?

In most situations, the page is trying to draw information when information doesn't exist. Let's say you make a record detail page for the Account object. If you don't have any accounts set up in Salesforce, you see an error. Or let's say you set up a group detail page, but your new site doesn't have any groups. Once again, you see an error.

To fix the errors that involve SEO-friendly URLs, add a URL slug to the object that you're referencing in the component. That way, the component loads the correct data. You can add the URL slug programmatically, such as using Apex, on the `ObjectRelatedUrl` object.

Any gotchas?

The Customer Service template uses topics to organize content in a site. To see topic detail pages, first set up Navigational Topics in Site Management.

The following default pages in the Customer Service template can show this error. Here are some tips on how to fix it.

- Article Detail: Create at least one Salesforce Knowledge article in your org.
- Topic Detail: Create a Navigational Topic.
- Question Detail: Create a Navigational Topic. Use the Ask a Question button to create a question.
- Feed Detail: Use the Post Publisher or Ask a Question button to create a post or question.
- Group Detail: Create a group in the site.

Create Custom Pages with Experience Builder

Create custom pages to extend your Experience Builder template. Add custom record detail, list, and related list pages to get the most from your Salesforce data.

1. In Experience Builder, open the Pages menu on the top toolbar.
2. Click **New Page** at the bottom of the Pages menu.

EDITIONS

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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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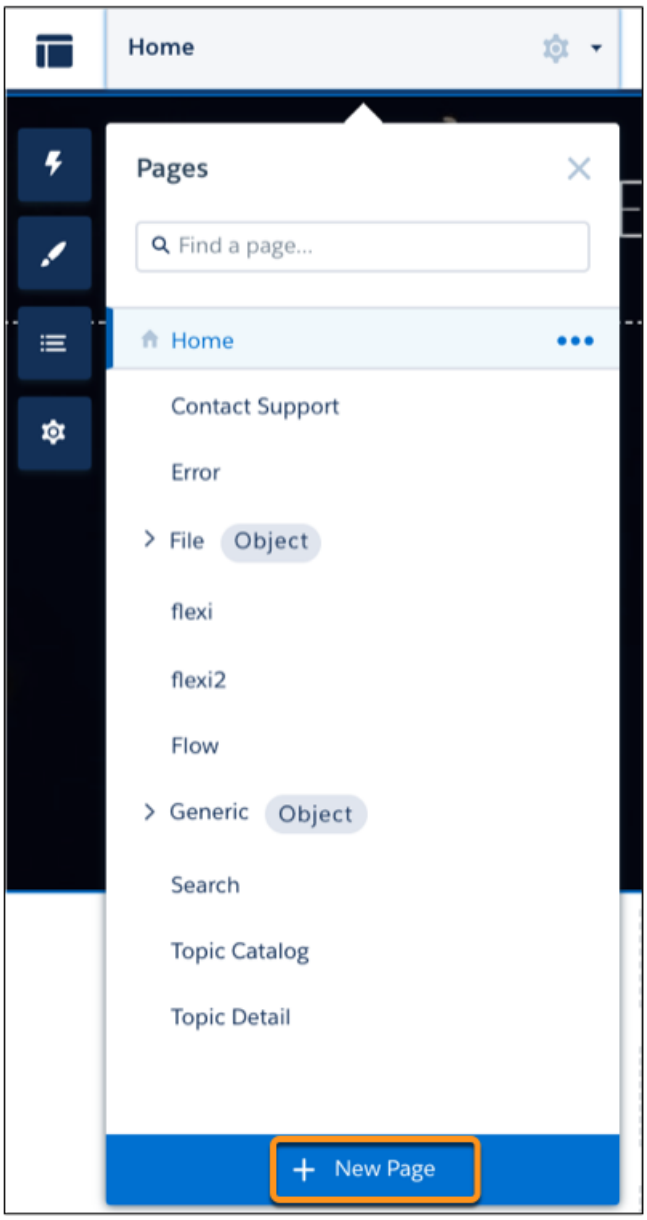


3. Select the page type:

Standard Page

A standard page based on a blank layout or a preconfigured page (if available).

If you don't have preconfigured pages, choose a blank layout, or build your own using a flexible layout on page 468. Alternatively, if you do have preconfigured pages (because you've exported or imported custom pages), choose one to customize or click **New Blank Page** to select a blank layout.

Click **Next**, give the page a name, specify the static portion of the page's URL, and provide an API Name (optional).

Note: You can use the unique API Name as the `name` attribute in the `comm__namedPage` page reference for the lightning-navigation API.

The API Name can contain only underscores and alphanumeric characters. It must be unique, begin with a letter and end with an alphanumeric character.

For existing pages, or if you leave the field blank, an API Name is generated automatically.

Packaging API names isn't currently supported. Sites created from an exported template could have a different API name than the original site. The `pageName` attribute is now deprecated.

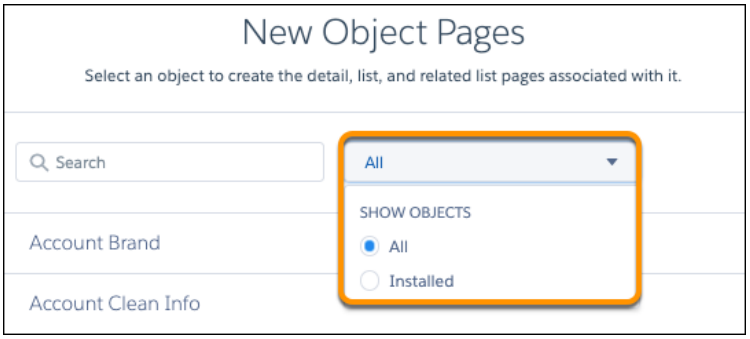
The following named pages can use the API Name in `lightning-navigation`.

- Home
- Account Management
- Contact Support
- Error
- Login
- My Account
- Top Articles
- Topic Catalog
- Custom pages

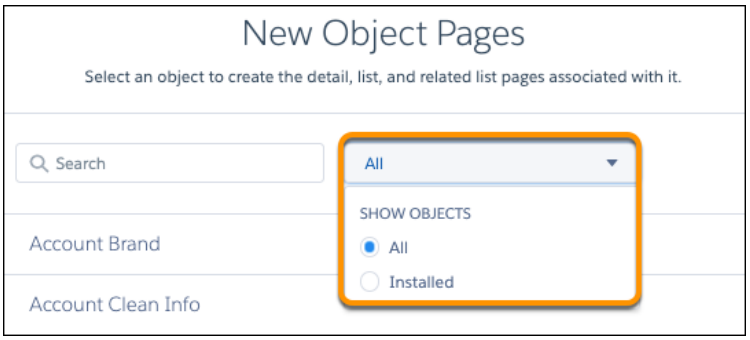
Object Pages

A detail, a list, and a related list page associated with one of your Salesforce objects.

Select the object that you want to associate with the page. You can view all existing object pages in your site or installed object pages. Installed object pages are pages that were exported from or imported into your org.



Add an object page from all existing object pages in your site (1), or add an installed object page (2). Installed object pages are exported and made available across all communities in your org.

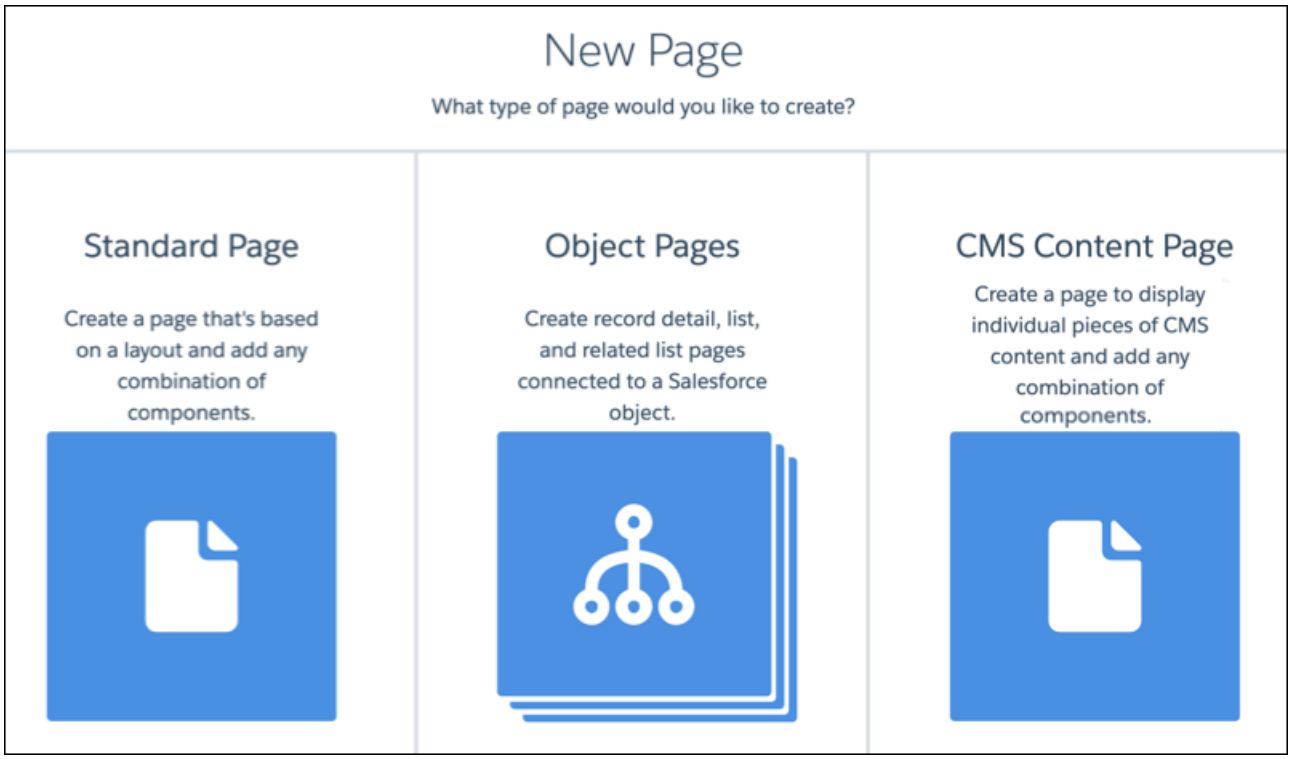


CMS Content Page

A detail page for a custom content type supporting Salesforce CMS.

Select the content type that you want to support. Click **Next**.

Note: CMS content pages use flexible layouts.

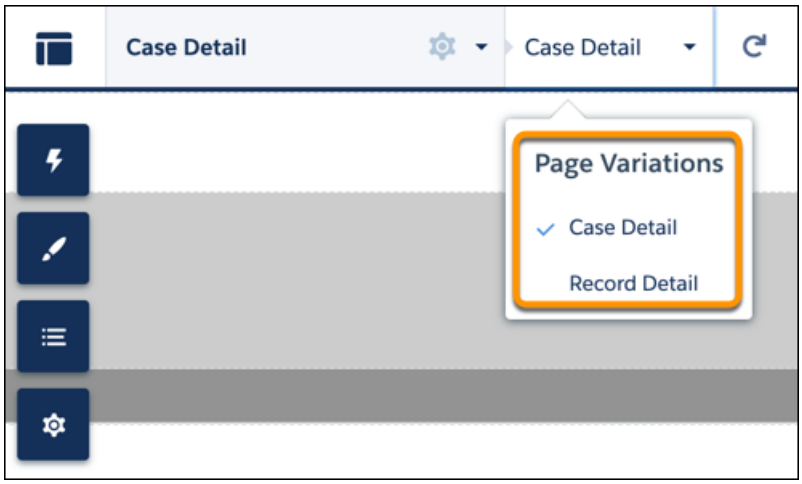


Object and Content pages are grouped to separate them from other types of pages, like custom standard pages.

Custom object pages are grouped with an **Object** label.

Custom content type detail pages are grouped with a **Content** label.

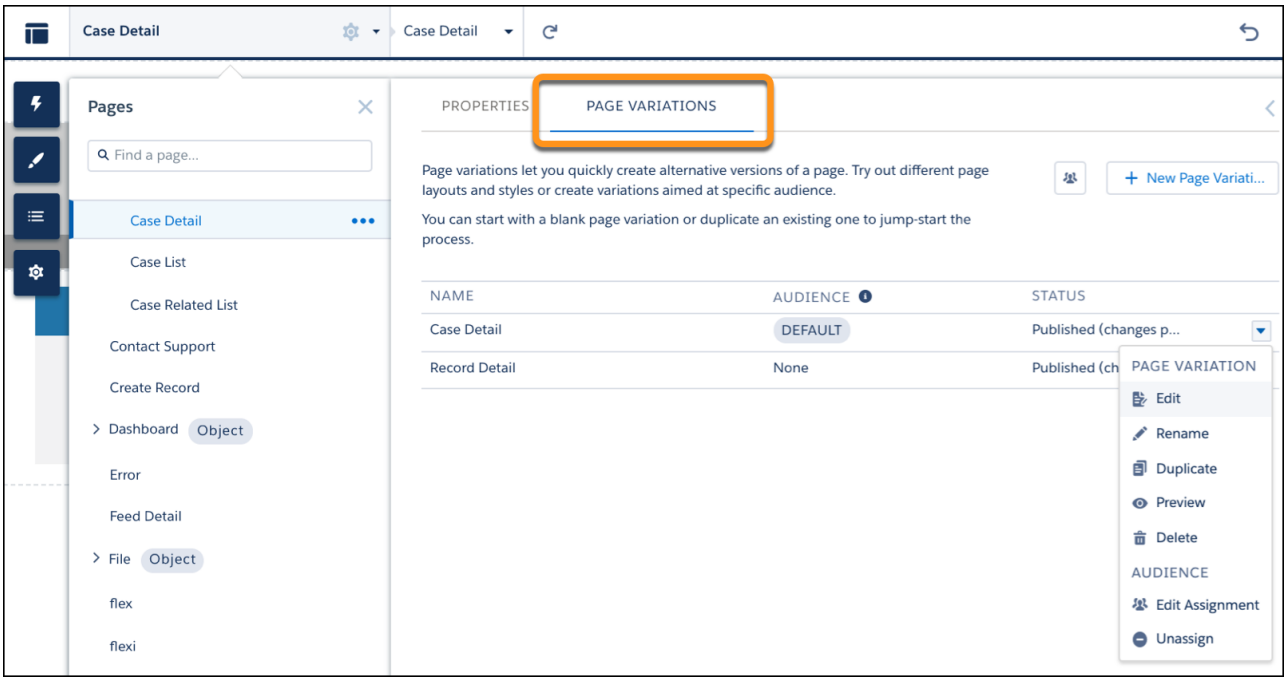
4. Select a standard page to open it. Use the page variations tab to select and open an object page.



5. Add and configure page components.
6. Preview and publish your site.

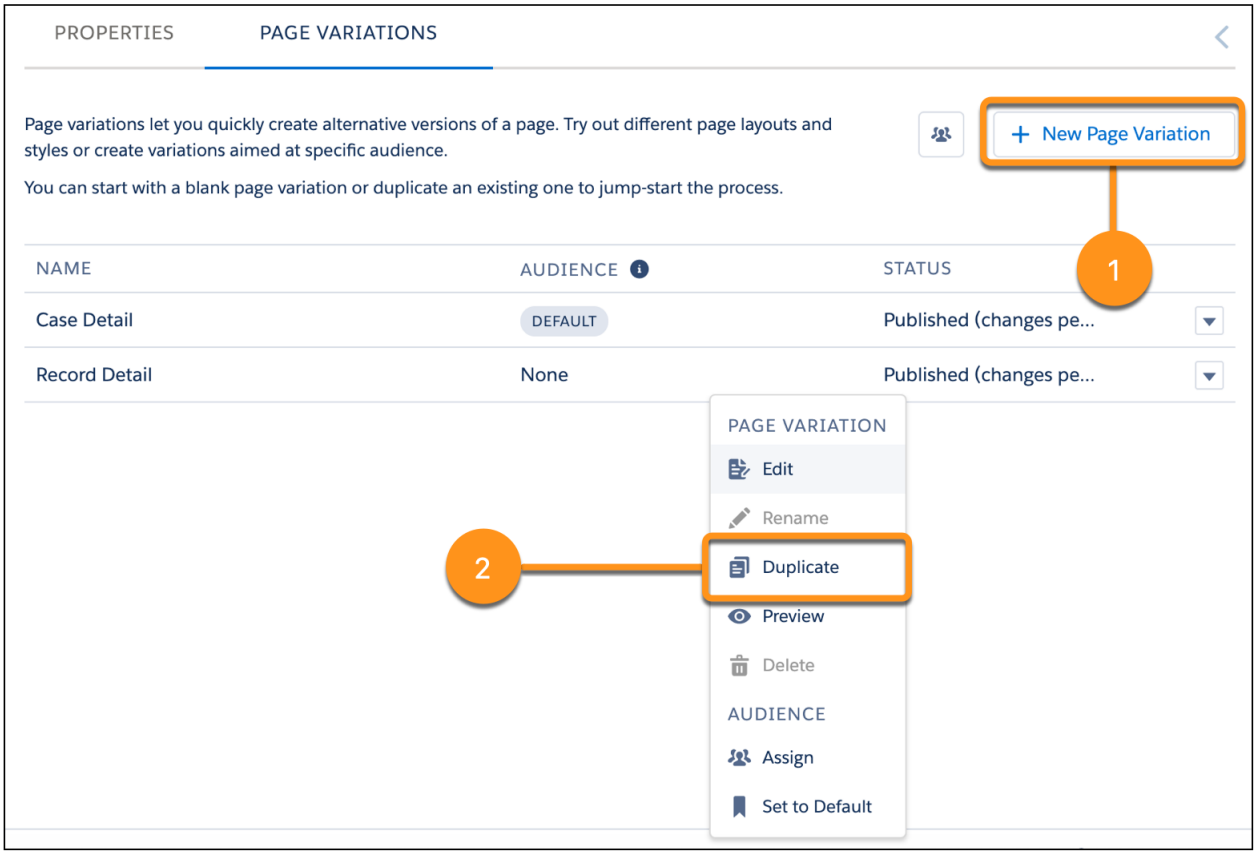
Tip:

- Click ••• from the Page Menu to access Page Properties. Quickly create alternative versions of the page in the Page Variations Tab. For example, you could create three different Question Detail pages to test out various layouts or styles, or to assign them to different audiences.



To create a page variation, click **New Page Variation** in the Page Variations tab (1).

To duplicate a page variation click ▼ > **Duplicate** (2). A copy of the page variation appears in the page variation list.



Note: If an audience doesn't have an assigned page variation and the default page variation for the object is deleted, users see a generic record layout when they try to access the record. Generic record layouts can include record detail, record list, and record-related list pages.

- Use the Navigation Menu component to create custom navigation nodes for new pages.

Create a Flexible Layout

Build highly customized pages using flexible layouts. Create and resize columns within each section, then add and stack sections to build out the page. Bring it all to life using background images and color.

Delete a Page in Experience Builder

Remove a site page or page variation that you no longer need by deleting it from the Page Action menu.

Create a Flexible Layout

Build highly customized pages using flexible layouts. Create and resize columns within each section, then add and stack sections to build out the page. Bring it all to life using background images and color.

1. Create a custom page using a flexible layout.
   - To use a flexible layout with an existing page, create a page variation.
   - You can make the page span edge to edge, giving you full-screen-width sections using the Set Max Page Width setting. First, create a theme layout from **Settings** > **Theme** > **Configure**. Then, in Edit Properties, deselect **Set Max Page Width**. Now you can create a page from this theme layout with sections that span the width of the screen.
   - When you select a flexible layout for your page, you can't change the layout type. The flexible layout lets you customize your page layout to suit your content needs.
2. Build out your sections.

   A section consists of a row on your page and all of its content. Example section:

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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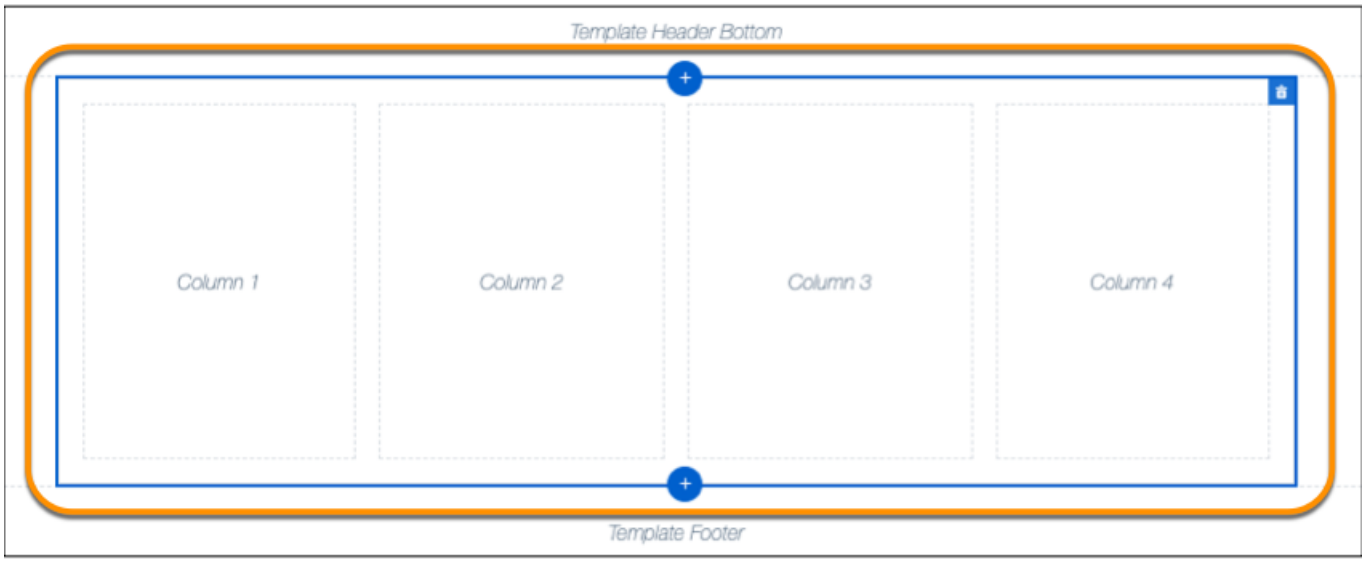


Add a Section

To add a section above or below the current section, click .

Delete a Section

To delete a section, click .

Note: Deleting a section also deletes all of its content. Pages must include at least one section. To delete the only section, create another section and try again.

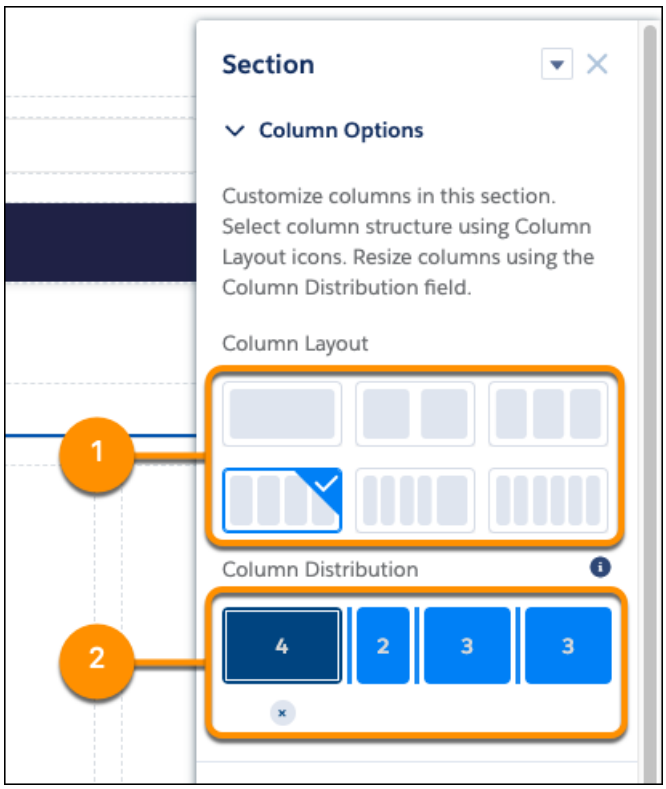
Reorder Sections

To reorder sections, drag the section to place it where you want it.

3. To customize a section, select it.

   Use Column Options to add, remove, and resize columns in this section.

   - To customize the column structure in this section, select a column layout icon **(1)**.
   - In the Column Distribution field **(2)**, use the handles between columns to resize them. The columns snap to a 12-column grid. The number in each column represents the grid units the column uses out of 12. So, to get two columns of equal width, you give each a value of 6. A section can have up to six columns.
   - To delete a selected column, click the × beneath it. Deleting a column also deletes all of its content.



Use Section Style to add some panache, like background images and color.

Color

Sets the section's background color. Click the color circle and use the color picker to select a color, or enter a specific hexadecimal code in the text box.

Image

Adds a background image to the section. Upload an image or select one from your org's asset library. Then, select the Image Layout and Image Position in the section.

Image Overlay Color

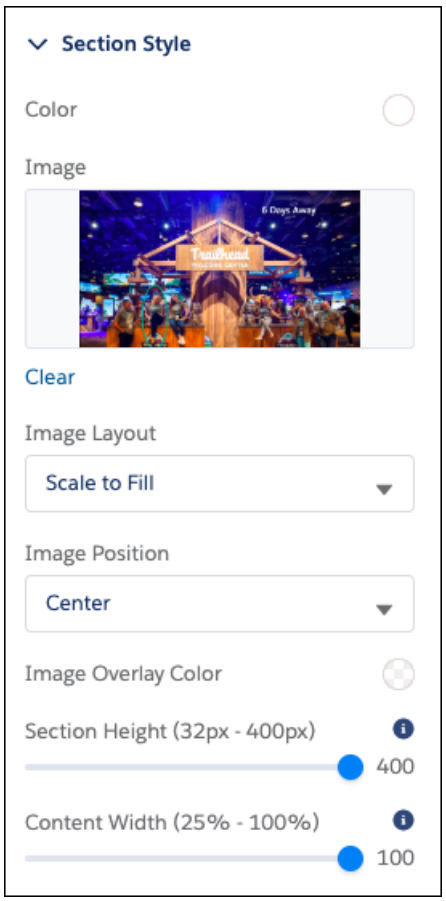
Adds an overlay color to the section. To select a color, click the color swatch or enter a specific hexadecimal code in the text box.

Section Height

Use the slider to set the minimum section height in pixels. Section adjusts automatically when content is taller. Minimum doesn't apply to phones or tablets in portrait mode.

Content Width

Use the slider to set the width of content as a percentage of the full width of the section. This setting doesn't apply to phones or tablets in portrait mode.



SEE ALSO:

Create Custom Pages with Experience Builder

Change the Theme Layout of Your Experience Cloud Site's Pages

Delete a Page in Experience Builder

Remove a site page or page variation that you no longer need by deleting it from the Page Action menu.

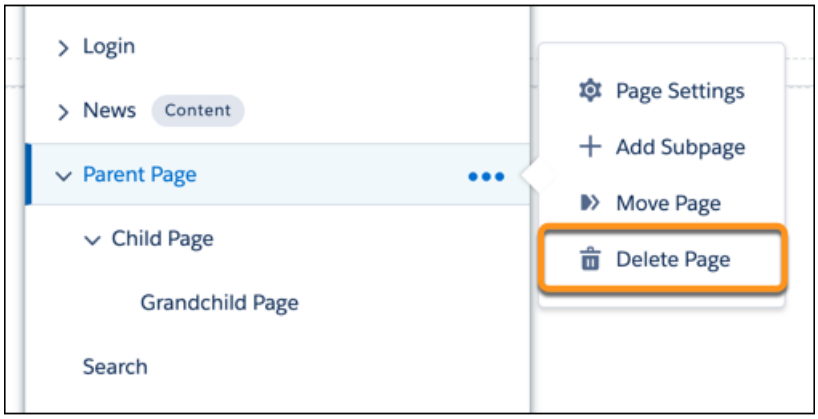
Before you delete a page from your site, review Considerations for Page Hierarchy and URL Conflicts in Experience Builder. Keep in mind that you can't delete:

- The default pages and objects that come with the template
- A page's default page variation
- A parent page without deleting its subpages
- A custom object page without deleting its related object pages (detail, list, and related list)

To delete a page or page variation:

1. In Experience Builder, open the Pages menu.
2. To access the Page Actions menu, click ⋯.
3. To delete a page, click **Delete Page**.

   Deleting a page also deletes the subpages nested under it. For example, when you delete Parent Page, Child Page and Grandchild Page are also deleted:



   To delete a subpage page in the page hierarchy, click ⋯ next to the specific page you want to delete.

4. To delete page variations (if available), open the Page Actions menu and click **Page Settings**.
5. Open the Page Variations tab.
6. Click the dropdown next to the page variation that you want to delete, then click **Delete**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Add Markup to the Page `<head>` to Customize Your Experience Builder Site

Add custom analytics, improve your SEO results, and more by adding custom markup to the page `<head>` in Experience Builder. For example, you can include SEO meta tags that are visible only to search engines, add a *favicon*, or add custom code for Adobe Analytics and Google Tag Manager.

Tip: Google Analytics is supported out-of-the box by Salesforce, and doesn't require the following steps. However, before using Google Analytics, you must configure it for your site.

For security purposes, we restrict the tags, attributes, and values allowed in the `head` markup of your pages.

Allowed Tags	Allowed Attributes
<base>	href, target
<link>	as, charset, crossorigin, disabled, href, hreflang, id, import, integrity, media, rel,[1] relList, rev, sheet, sizes, target, title, type [1] For rel, allowed values are alternate, apple-touch-icon, apple-touch-icon-precomposed, apple-touch-startup-image, author, bookmark, canonical, external, help, icon, license, manifest, mask-icon, next, nofollow, noopener, noreferrer, pingback, prefetch, preload, prev, search, shortcut icon, stylesheet, and tag.
<meta>	charset, content, http-equiv,[2] name, property, scheme [2] For http-equiv, allowed values are cleartype, content-type, content-language, and default-style. The attribute `http-equiv="X-UA-Compatible"` is only supported in combination with `content="IE=Edge"`.
<noscript>	Within <noscript> only the following elements are supported: <a>, <iframe>, <img>, and <meta>[3] [3]For <meta>, allowed attributes are http-equiv and content. Both attributes are required. refresh is the only allowed value for the attribute http-equiv.
<script>	Use for custom content
<style>	type, media, nonce, title
<title>	None allowed

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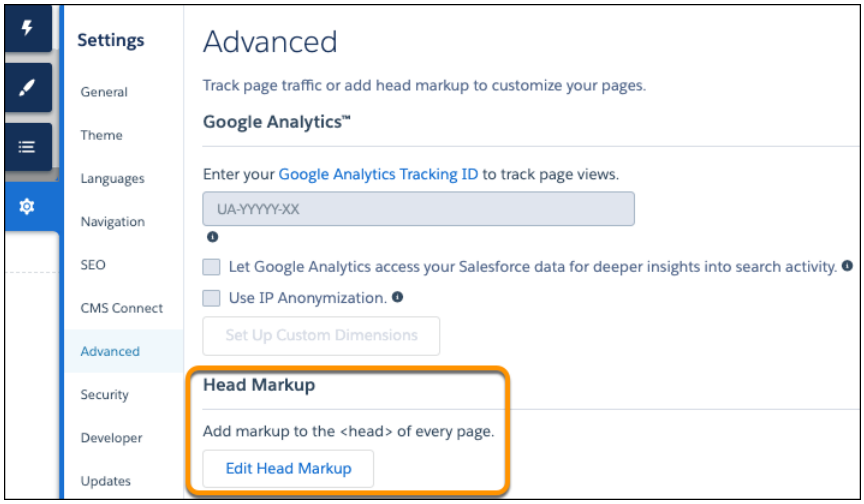
Note: If the content in your `<head>` tag is invalid, you can't save your work. If you entered unsupported code, hover over ⊗ to see details on the issues.

Existing `head` elements that contain invalid markup are stripped from the page before it's rendered. To get the `head` working again, use Experience Builder to remove the unsupported tags.

1. In Experience Builder, click > **Advanced**.

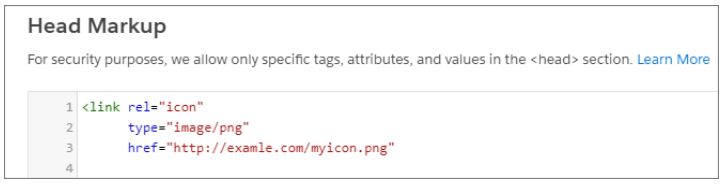


2. Click **Edit Head Markup**.
3. Enter the markup and save your changes.
   When you add custom markup, the code is added to the `head` of every page in your site, including login pages.
4. Before deploying the site to your production org, test the `head` markup in your sandbox or DE orgs.

   Depending on the CSP security level of your site, head markup sometimes doesn't work as expected. See Select the Relaxed CSP security level.

   Alternatively, conflicts can arise with Lightning Locker. See Resolve Lightning Locker Conflicts in Experience Builder in the *Experience Cloud Developer Guide*.

Example: Here we added HTML to include a favicon on our site's pages.



SEE ALSO:

Experience Cloud Developer Guide: Example: Adobe Analytics and Lightning Locker in Experience Builder Sites

LWR Sites for Experience Cloud Developer Guide: Head Markup in LWR Sites

Expression-Based Component Variations in Enhanced LWR Sites

Site visitors are important to your business and deserve to have the most custom experience possible. With Expression-Based Component Variations, you can create multiple versions of a component and then change the style and visibility settings to make each version unique. You can choose to have a single variation for a targeted group or several variations that apply broadly to subsets of your users. Apply visibility rules to each variation to make it appear to the appropriate site visitors. And when you have multiple variations for the same component, prioritize them so you know when your variations appear and to whom.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

Create Component Variations in LWR Sites

Use Expression-Based Component Variations to create multiple versions of your component and assign visibility rules to target specific customer groups with each variation. Component Variations gives your site more flexibility and better opportunities to cater to individual customers and create the best experience possible.

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Use Expression-Based Component Variations to create multiple versions of your component and assign visibility rules to target specific customer groups with each variation. Component Variations gives your site more flexibility and better opportunities to cater to individual customers and create the best experience possible.

You can create variations for any component from the Component Variations icon.

1. From Experience Builder, select a component that appears on the canvas or add a new one.
2. Click the Component Variations icon at the top of the properties panel.
3. Click **+New Component Variation**.
4. Enter a name and save your variation. Your new variation is now listed in the Draft Variations section. It remains in draft state until you add a visibility rule.

   You can change your component name later by selecting the settings dropdown and clicking **Edit Name**.
5. To differentiate your variation from the default component, select your variation and update the options on the Settings and Style tabs. When you're ready to make the variation visible, go to the Visibility tab.
6. Click **+Add Visibility Rule**. Create a rule with one or several conditions. Show or hide your variation when the conditions are met.
7. Save your visibility rule. Your variation is now available in a published state and appears to site visitors when the conditions are met.
8. After you create multiple variations, prioritize them from the Variations dropdown by dragging them into the appropriate order.

Things to keep in mind:

- Each component can have up to 15 variations.
- Priority kicks in when a condition is true for more than one variation. If no conditions are true for any variation, the default component is shown.
- When a component has variations, the variations icon appears on the canvas next to the component name.
- The default component is the original version that your variations are based on. For the default component (Default) is listed next to the component name in the variations list and in the component title.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

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- Be a member of the site AND an experience admin or publisher in that site

Expression-Based Visibility in Enhanced LWR Sites

With Expression-Based Visibility, you can create a set of rules that dictate when and to whom your components in your enhanced LWR sites appear. Choose visibility settings based on User and Product object fields such as location, language, buyer groups, and more. Creating visibility conditions based on expressions improves the agility of your site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

Create Dynamic Component Visibility in LWR Sites

Control component visibility on your enhanced LWR site pages by creating rules that contain conditions. Stack multiple conditions to create the perfect set of visibility conditions for each component.

Expression-Based Visibility Rules in LWR Sites

Use Expression-Based Visibility to define when and to whom your components appear in your enhanced LWR sites. Create component visibility rules from the Visibility tab on your components.

Build an Expression-Based Visibility Rule in LWR Sites Using Custom Logic

Build your own custom logic to show or hide a component or component variation. Create a custom logic expression by adding your conditions for component visibility.

Create Dynamic Component Visibility in LWR Sites

Control component visibility on your enhanced LWR site pages by creating rules that contain conditions. Stack multiple conditions to create the perfect set of visibility conditions for each component.

Important: Visibility rules created during the Spring '23 pilot are no longer functional and must be replaced in future releases.

You can create rules for any component in Experience Builder by using the Visibility tab.

1. From Experience Builder, select a component that appears on the canvas.
2. Click the **Visibility** tab.
3. Click **+Add Visibility Rule**. Create a rule with one or several conditions. Show or hide your component when the conditions are met.
4. Save your rule. Your new rule is viewable and editable from the Visibility tab.

EDITIONS

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Applies to: LWR sites

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EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

Important: Visibility rules created during the Spring '23 pilot are no longer functional and must be replaced in future releases.

Note: You can also hide or show components based on device type.

For each component you can create a single rule that can contain multiple conditions. Each condition can have up to 5 spans. For example, `User.Record.Last Modified By.Contact.Account Name.ShippingCity` contains six spans so it isn't allowed. If you don't create any rules, the component appears to everyone. Rules are created using AND, OR, or custom logic.

Example: Consider a rule with a Show component state and two conditions using AND logic. One condition says that the User Record City must equal Chicago and the second says that the User Record Title must equal Marketing Manager. The component appears to all users that are in Chicago AND have the title of Marketing Manager. If you changed the logic to OR, the component appears to anyone in Chicago OR anyone with the title of Marketing Manager.

Selectable condition values depend on the type of resource. If you select a field with a predefined list of values, the list is populated in the Value dropdown. If you select an open text field, an open text field is available for the value.

Note: Visibility rules aren't visible from the canvas. From preview mode, user type is evaluated based on the mode, and rules apply if relevant.

Supported Objects, Fields, Field Types, and Operators

Two objects are supported: User and Product. Not all fields are supported for either object.

Component visibility rules rely on the data captured in fields associated with the page's object. Not all fields, field types, and operators are supported. Supported operators depend on the selected field type.

Supported field types:

- String type fields: Autonumber, Currency, Email, Number, Percent, Phone, Text, Text Area, URL
- Checkbox (boolean)
- Number
- Picklist
- Multi picklist

Supported Operators:

- = and == (Equal)
- <> or != (Not Equal)
- > (Greater Than)
- >= (Greater Than or Equal)
- < (Less Than)
- <= (Less Than or Equal)
- CONTAINS (only available for string, picklist, and multi-picklist fields)

- NOT CONTAINS (only available for string, picklist, and multi-picklist fields)

SEE ALSO:

Show or Hide Components on Mobile, Tablet, or Desktop for Enhanced LWR Sites

Build an Expression-Based Visibility Rule in LWR Sites Using Custom Logic

Build your own custom logic to show or hide a component or component variation. Create a custom logic expression by adding your conditions for component visibility.

You can create visibility rules for any component in Experience Builder from the Visibility tab. Before creating a custom logic expression, add and specify the conditions. When you add a condition, it's numbered. Your first condition is numbered 1, the second is numbered 2, and so forth. Use these conditions to build your expression.

1. From Experience Builder, select a component that appears on the canvas.
2. From the Visibility tab, click **+ Add Visibility Rule**.
3. From the Component State dropdown, choose to show or hide the component.
4. To add a condition for the logic, click **Add Condition**. Choose values for all the conditions that you add.

   Add at least two conditions.
5. From the When dropdown, select **The Custom Logic Is Met**.
6. In the Custom Logic field, enter your custom logic expression.

   Consider these criteria when you build a custom logic expression: Include at least 2 conditions, use all the added conditions, and use only AND and OR operators.
7. Save your work.

Example: Consider a scenario where you add three conditions: 1, 2, and 3. Your custom logic expression can be `1 AND 2 OR 3`. In this case, your component or variation would appear when the conditions 1 and 2 are met, or when only condition 3 is met.

Another scenario: Consider the logic `((1 OR 2) AND (2 OR 3))`. In this example your component would appear when either condition 1 or 2 is met AND condition 2 or 3 is met.

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Personalization with Audience Targeting in Aura Sites

Keep your users engaged by offering personalized, relevant content that's customized for a particular audience. To create an audience, you assemble a set of criteria that defines a user segment. You can then tailor a single site to meet the needs of multiple user segments. For example, you can present the same site with a different look and feel for each audience or show different pages, components, or data to different audiences.

EDITIONS

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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

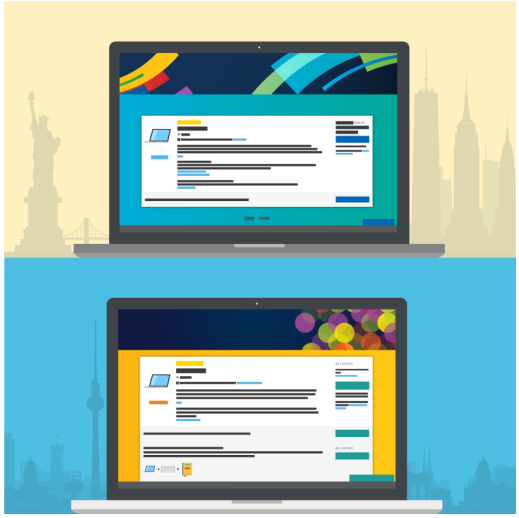
Applies to: Aura sites

Important: An audience varies what your site visitors can see, but don't use audiences to keep sensitive data private. Instead, use standard security methods.

To create an audience, you can choose from among several criteria types, such as user related or record related. You can assign audiences to page variations, branding sets, or components. For certain components, you also can assign an audience to a component variation to personalize the content that different audiences see within the component.

- Page variations—Apply audiences to show users different versions of the same page, such as the home page or a record detail page.
- Branding sets—Show the same content to everyone, with a different look and feel for each audience.
- Components—All users see the same page, but what's on the page differs among user segments.
- Component variations—For the CMS Collection, Navigation Menu, and Tile Menu components, all users see the components, but the content in the components differs by user segment.

For example, your company offers products that differ between North America and Europe. Rather than create an individual site for each region, you can create region-specific versions of the same site. Then you can define audiences based on geolocation and apply each audience to a regional site version. Your audience in North America sees one version, and your audience in Europe sees the other version.



Considerations for Audience Targeting in Aura Sites

Audiences are a great help when you want to target specific user segments with relevant site content. As you work with audiences, there are some things to consider.

Create an Audience for an Aura Site

You define an audience by selecting criteria and the conditions under which the criteria apply. After you create an audience, you can assign it to a page variation, branding set, or component. You also can assign an audience to a component variation to personalize the content that different user segments see in the CMS Collection, Navigation Menu, and Tile Menu components.

Assign an Audience to a Page Variation

You can show different pages to different audiences.

Assign an Audience to a Branding Set

You can tailor your branding to different audiences. For example, you can show one look and feel to your customers and another to your partners.

Assign an Audience to a Component

When you assign an audience to a page component, all users see the same page, but the components that are visible on the page differ among user segments. For example, you have a page that's visible to site members and guest users, and you want your members to be able to post questions and comments. You can add the Feed Publisher component to the page and assign this component to an audience for site members only. Your members can see the component, and guest users can't.

Assign an Audience to a Component Variation

Use audiences to vary the content that users see within the CMS Collection, Navigation Menu, or Tile Menu components. For example, show one navigation menu to your site members and a more abbreviated navigation menu to guest users. Or show different CMS content to internal employees and external partners.

Prioritize Audiences in Aura Sites

When site visitors meet the criteria for more than one audience, you can prioritize which page variation, branding set, navigation menu, or CMS collection they see. To prioritize audiences, at least two audiences must be assigned to the page variation, branding set, or component variation.

Considerations for Audience Targeting in Aura Sites

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Applies to: Aura sites

General Considerations

- You can create up to 1,500 audiences per site. To locate an audience in the Assign Audiences window, you can search using the % wildcard. You can also sort audiences by name or creation date.
- You can't assign audiences to the components in the template header and footer sections.
- Custom object records aren't automatically available in partial copy sandboxes and can cause issues with audiences that reference the custom objects. To avoid this situation, follow one of these recommendations.
  - Include the custom object data in your sandbox.
  - Temporarily remove the criteria that reference the custom object.
  - Edit records that include the custom object, and delete the data in the custom object lookup field.
- After you publish your site, a slight delay can occur as your site loads, during which you see the default version of a page, component, or branding set. In this case, wait a bit and reload the page.
- When an audience contains record-based criteria, field-level security that's applied to criteria in the audience can restrict site visibility based on those field-level security settings. However, when an audience contains only user-based criteria, field-level security settings don't restrict site visibility.

Location Criteria Considerations

- The user's IP address, which can be in a neighboring geographical area, determines the location.
- The location permission isn't on by default in Developer Edition orgs. Contact Salesforce if you want to use this feature in that edition.
- Some countries don't permit use of the Google API. Location criteria don't work for those regions.
- Custom location fields aren't available for use as audience criteria.
- Keep location criteria broad. If an audience that's limited to a particular city is unlikely to get much traffic, try using a larger geographic area, such as a state or a country. Or create one audience with multiple cities or states in the location criteria.
- If you use an external CDN service, you must set the True-Client-IP header in your external CDN. Audience targeting can return unexpected results without this header. Refer to your CDN provider documentation for help with setting up headers.

Domain Criteria Considerations

- Available domains are created in Salesforce and associated with a site through a custom URL.
- Domain criteria aren't available in Developer Edition orgs.

Record-Based Criteria Considerations

- Record-based criteria use record fields, such as opportunity amount, not user fields, such as role.
- You can assign an audience that includes record-based criteria only to a record detail page or a variation of that record detail page.
- You can't assign an audience that includes record-based criteria to a branding set or component. Audiences that include record-based criteria don't appear on the list of audiences to choose from.
- When you create an audience from a component or branding set, record-based criteria aren't available for selection.

Audience Criteria Considerations

- If an audience contains record-based criteria, you can't use that audience as a criterion in another audience.
- You can't use an audience as a criterion for itself.
- An audience that's used as a criterion for another audience can contain up to 10 criteria.
- Audience criteria can be only one level deep. For example, you have three audiences: a California User audience, a Partner audience, and a Dog Owner audience. You can use Dog Owner as a criterion for Partner. However, you can't then use Partner as a criterion for California User because Partner already contains an audience criterion: Dog Owner.
- Layering audiences can be tricky. For example, if you have a San Francisco audience assigned to a page variation, all your users in San Francisco can see the page. If you add "company name" as a criterion to a component on the page, that component is visible only to users in San Francisco who work for that company. If you assign a California audience to the component, no one outside San Francisco can see the component because the entire page is assigned to the narrower San Francisco audience.

Create an Audience for an Aura Site

You define an audience by selecting criteria and the conditions under which the criteria apply. After you create an audience, you can assign it to a page variation, branding set, or component. You also can assign an audience to a component variation to personalize the content that different user segments see in the CMS Collection, Navigation Menu, and Tile Menu components.

You can follow the basic steps on page 483 to create an audience or, for more complex audience creation, you can build an audience with a custom formula on page 484 that uses AND and OR statements.

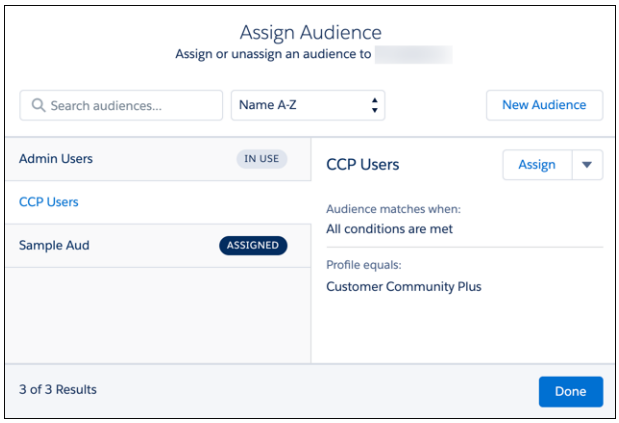
These steps walk you through how to create an audience in the New Audience window, which you can open from the Assign Audience window. How to access the Assign Audience window depends on whether you start from a page variation, branding set, or component. See these topics to learn how to navigate to the Assign Audience and New Audience windows from those different site locations:

- Assign an Audience to a Page Variation
- Assign an Audience to a Branding Set
- Assign an Audience to a Component
- Assign an Audience to a Component Variation

Note: When you create an audience from a component or branding set, the audience can't include record-based criteria. You can include record-based criteria only when you create an audience from a page variation.

Create an Audience—Basic Steps

1. In the Assign Audience window, click **New Audience**.



2. Name the audience. For example, `California Partners`.

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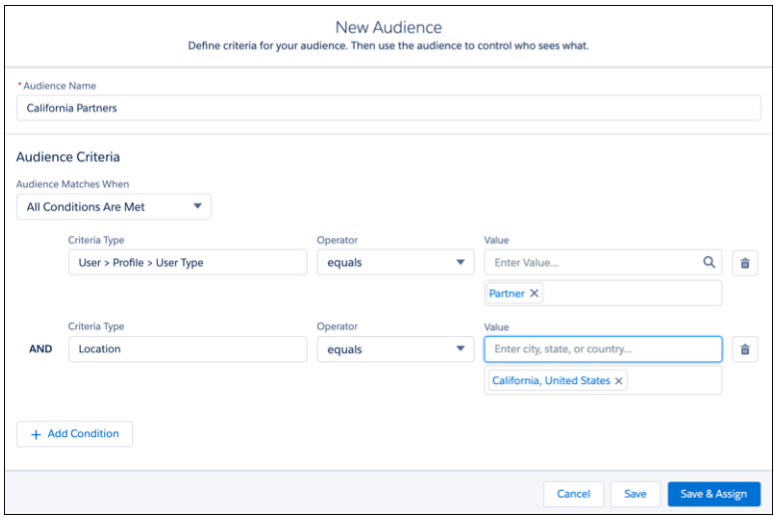


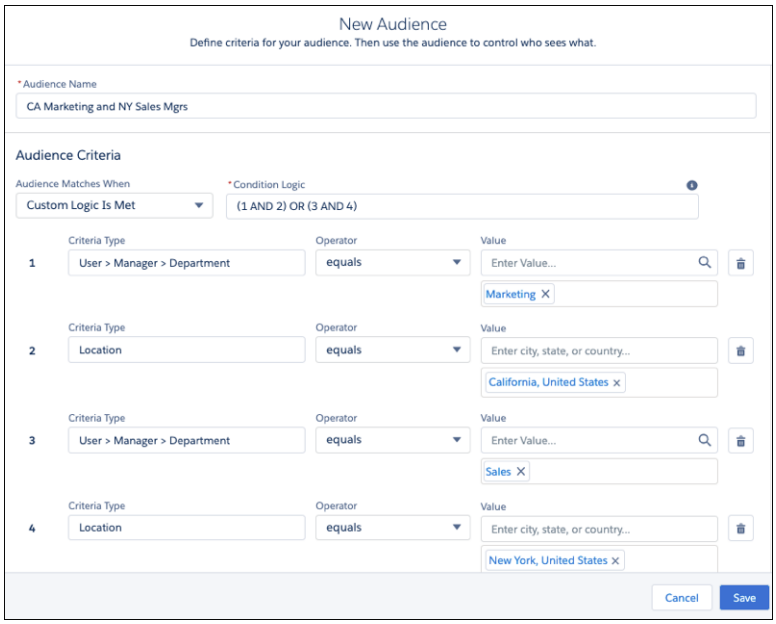
3. Under Audience Matches When, select which conditions are required for the audience to apply. For example, **All Conditions Are Met**.
4. Click the **Criteria Type** field, and select a criteria type from the menu. For example, **Location** or **User** > **Profile** > **User Type**.
5. Select an operator. For example, **equals**.
6. Enter a value for this criterion. For example, enter a location or select **Partner** from the menu.
7. To add more criteria, click **Add Condition**.
8. After you set all the criteria that you want to define the audience, save your changes.

Now you can assign the audience.

Create an Audience with Custom Logic

Let's say you want to create a highly targeted audience, such as marketing managers in California and sales managers in New York. You can create one audience with multiple user and location criteria and use parentheses and the AND operator to group the related criteria. Then you can separate the groups with the OR operator.

1. In the Assign Audience window, click **New Audience**.
2. Name the audience. For example, `CA Marketing and NY Sales Mgrs`.



3. Under Audience Matches When, select **Custom Logic Is Met**.
4. Add the user and location criteria.
   - User > Manager > Department equals Marketing
   - Location equals California, United States
   - User > Manager > Department equals Sales
   - Location equals New York, United States
5. In the Condition Logic field, group the criteria using parentheses, pairing each targeted role and location with AND, and separating the groups with OR: `(1 AND 2) OR (3 AND 4)`.

   For example, pairing `(1 and 2)` puts the marketing managers in California in one group, and `(3 and 4)` puts the sales managers in New York in another group. When you assign the audience, these criteria apply to users who fit in either group.
6. Save your changes.

   Now you can assign the audience.

Criteria Types and Conditions for Audience Creation

You can use several types of criteria to define an audience and determine the conditions under which the criteria apply.

SEE ALSO:

Considerations for Audience Targeting in Aura Sites

Criteria Types and Conditions for Audience Creation

Criteria Types and Conditions for Audience Creation

You can use several types of criteria to define an audience and determine the conditions under which the criteria apply.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

Audience Criteria Types

Profile

Target users who fit a particular profile that's defined in your org—for example, Customer Community User, Partner, Marketing User.

Location

Target users who are in a particular geographic area, such as a state or country, as determined by their IP address.

For limitations to keep in mind, see Location Criteria Considerations on page 482.

Domain

Target users based on how they enter your site, such as via coffee.awsimporters.com or tea.awsimporters.com.

For limitations to keep in mind, see Domain Criteria Considerations on page 482.

User Object

Target users based on CRM fields, such as the department that they work in or their role. You can select these types of fields on CRM objects.

- Text
- Picklist
- Multi-select picklist
- Number
- Checkbox
- Currency
- Date (but not Date/Time)

Permission

Target users who are assigned particular permissions in your org.

Record-Based Criteria

Vary what users can see based on the characteristics of the record that they're viewing. For example, show different record detail pages for a low-priority case and an escalated case, or show different pages for high-value versus low-value opportunities. You can use these objects to create record-based criteria.

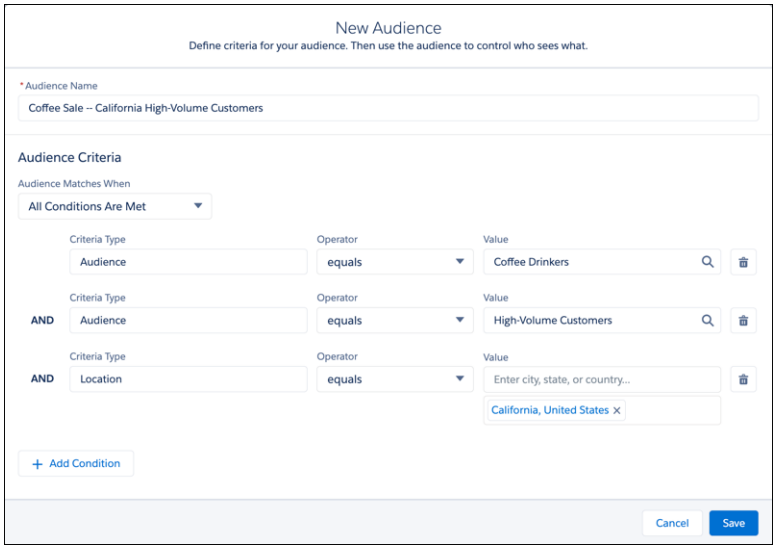
- Account
- Asset
- Campaign
- Case
- Contact
- Contract
- Lead
- Opportunity
- Product2
- ProductCategory

- Quote
- Custom objects
- Any object, except Knowledge, with at least one record type (only some fields available)

For limitations to keep in mind, see Record-Based Criteria Considerations on page 482.

Audience

To avoid re-creating complex sets of criteria, you can use audiences as criteria to create another audience. For example, you have a site that sells coffee and tea, and you created audiences for coffee drinkers, tea drinkers, and high-volume customers. Then you want to market a special opportunity for coffee drinkers in California who are high-volume customers. You can create an audience just for this sale using your Coffee Drinkers and High-Volume Customers audiences, plus a location criterion for California.



For limitations to keep in mind, see Audience Criteria Considerations on page 482.

Conditions for Audience Matching

In the Audience Matches When picklist, you determine the conditions under which your audience criteria apply. The criteria can apply when:

- All conditions are met
- Any condition is met
- Custom logic is met

For example, you create an audience with a Location criterion of California and a Profile criterion of Customer Community User. If the audience criteria apply when all conditions are met, only users in California with the Customer Community User profile can see your content. If the audience criteria apply when any condition is met, any user in California, and any user anywhere with the Customer Community User profile, can see your content.

To create more complex audiences, you can use custom logic. With custom logic, you use AND and OR statements to group and apply audience criteria. For example, you have an internal site, and you want to target content to marketing managers based in California and sales managers based in New York. You can use custom logic so that users who fall into either of these audiences can see that content.

SEE ALSO:

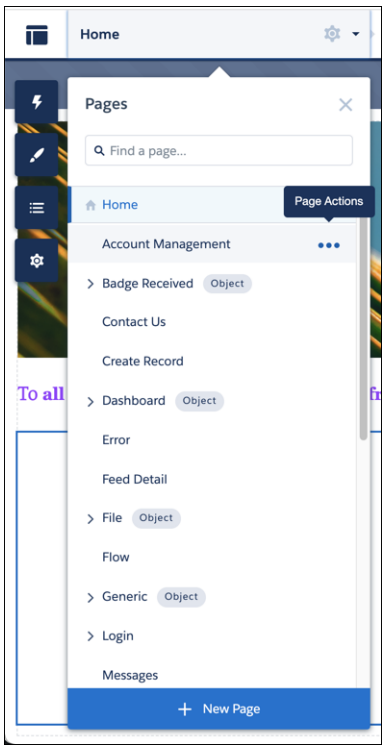
Considerations for Audience Targeting in Aura Sites

Create an Audience for an Aura Site

Assign an Audience to a Page Variation

You can show different pages to different audiences.

1. In Experience Builder, open the Pages menu in the top toolbar, hover over the page that you want to edit, and click the Page Actions icon.



2. Select **Page Settings**, and open the Page Variations tab.
3. Click the down arrow for the page variation that you want to work with, and select **Assign** or, if the page variation already has an assigned audience, select **Edit Assignment**.
4. In the Assign Audience window:
   - To create an audience, click **New Audience**. Name the audience, set the criteria to define it, select the conditions when the audience matches, and click **Save & Assign**.
   - To assign an existing audience to the page variation, select the audience, click **Assign**, and click **Done**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

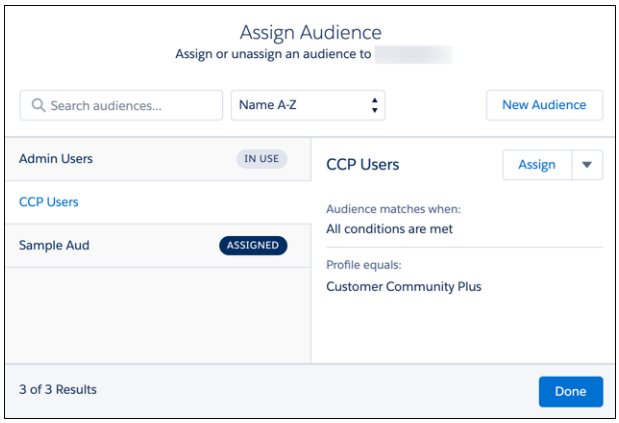
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

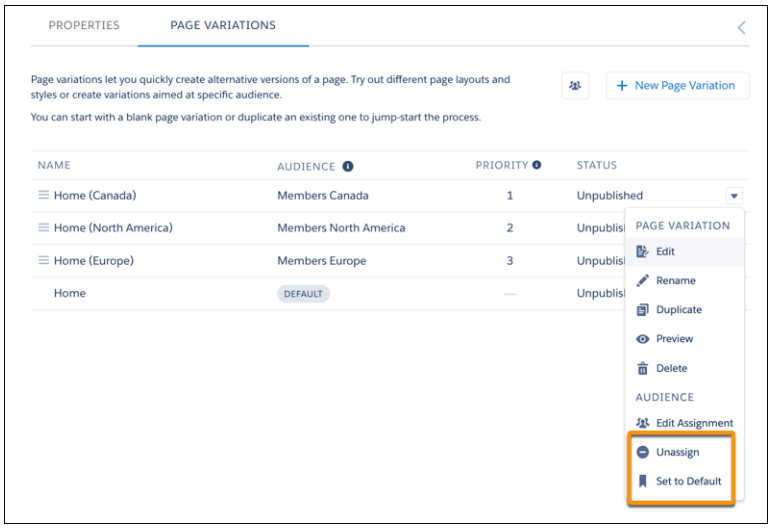
- Be a member of the site AND an experience admin or publisher in that site



5. To make these changes visible to your site visitors, publish the site.

Each page has a default page version. Site visitors who don't meet the criteria for an assigned audience see the default page. To set the audience visibility of a page variation to Default, in the Page Variation window, click the down arrow next to the page variation, and select **Set to Default**. You can't edit the audience assignment of the default page variation.

When you want to hide a page variation from all site visitors, you can set its audience visibility to None. Click the down arrow next to the page variation, and select **Unassign**. A page variation that's not assigned to an audience isn't visible to any site visitors.



SEE ALSO:

Considerations for Audience Targeting in Aura Sites

Criteria Types and Conditions for Audience Creation

Create an Audience for an Aura Site

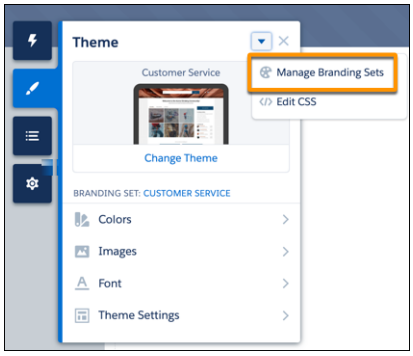
Prioritize Audiences in Aura Sites

Blog post: How to Personalize the Shared Regions of Your Experience Builder Site

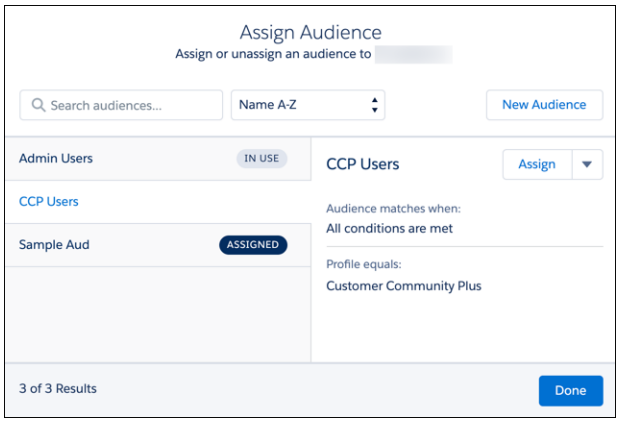
Assign an Audience to a Branding Set

You can tailor your branding to different audiences. For example, you can show one look and feel to your customers and another to your partners.

1. In Experience Builder, open the Theme panel, click the down arrow next to the panel title, and select **Manage Branding Sets**.



2. In the Branding Sets pane, click the down arrow for the branding set that you want to work with, and select **Assign**. Or, if the branding set already has an assigned audience, select **Edit Assignment**.
3. In the Assign Audience window:
   - To create an audience, click **New Audience**. Name the audience, set the criteria to define it, select the conditions when the audience matches, and click **Save & Assign**.
   - To assign an existing audience to the branding set, select the audience, click **Assign**, and click **Done**.



Note: You can't assign an audience that includes record-based criteria to a branding set. Therefore, the Assign Audience window for a branding set doesn't show audiences that include record-based criteria.

4. To make these changes visible to your site visitors, publish the site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Each Experience Cloud site has a branding set that's assigned to the default audience. Site visitors who don't meet the criteria for an assigned audience see the default branding. You can't edit the audience assignment of the default branding set.

SEE ALSO:

Considerations for Audience Targeting in Aura Sites

Criteria Types and Conditions for Audience Creation

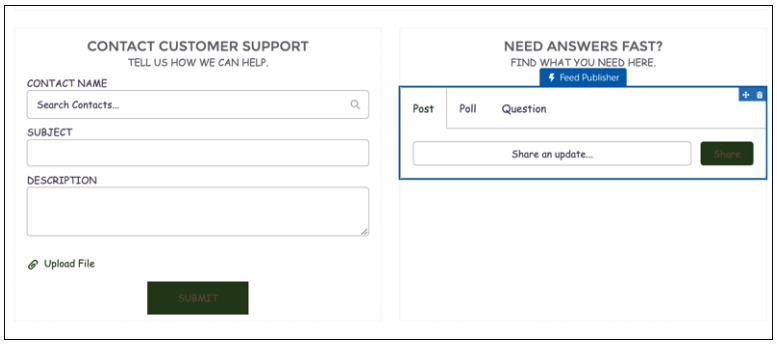
Create an Audience for an Aura Site

Prioritize Audiences in Aura Sites

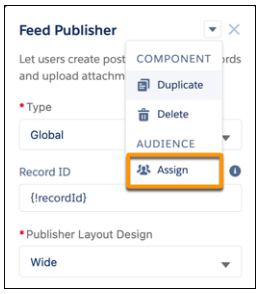
Assign an Audience to a Component

When you assign an audience to a page component, all users see the same page, but the components that are visible on the page differ among user segments. For example, you have a page that's visible to site members and guest users, and you want your members to be able to post questions and comments. You can add the Feed Publisher component to the page and assign this component to an audience for site members only. Your members can see the component, and guest users can't.

1. In Experience Builder, click the component that you want to work with. The blue outline around the component indicates that it doesn't have an assigned audience.



2. In the component's properties panel, click the down arrow next to the component name, and select **Assign**.



3. In the Assign Audience window:
   - To create an audience, click **New Audience**. Name the audience, set the criteria to define it, select the conditions when the audience matches, and click **Save & Assign**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

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  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

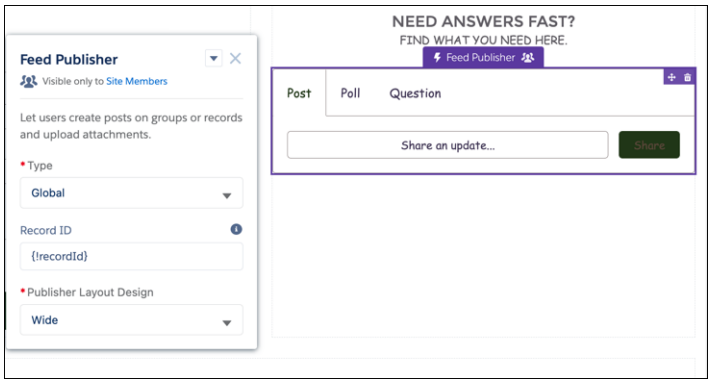
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

- To assign an existing audience to the component, select the audience, click **Assign**, and click **Done**.



The component outline changes to purple and shows an audience icon to indicate that the component has an audience assigned. In the component's properties panel, the audience icon and the name of the assigned audience appear with the component name. In Experience Builder, a note at the top of the page alerts you that at least one component on the page has a specific audience.

Note: You can't assign an audience that includes record-based criteria to a component. Therefore, the Assign Audience window for a component doesn't show audiences that include record-based criteria. You also can't assign an audience to a component in the page template's header or footer section.

4. To make these changes visible to your site visitors, publish the site.

Note: With the Navigation Menu, Tile Menu, and CMS Collection components, you also can control which information within the component is visible to different audiences. See Assign an Audience to a Component Variation.

SEE ALSO:

Considerations for Audience Targeting in Aura Sites

Criteria Types and Conditions for Audience Creation

Create an Audience for an Aura Site

Assign an Audience to a Component Variation

Assign an Audience to a Component Variation

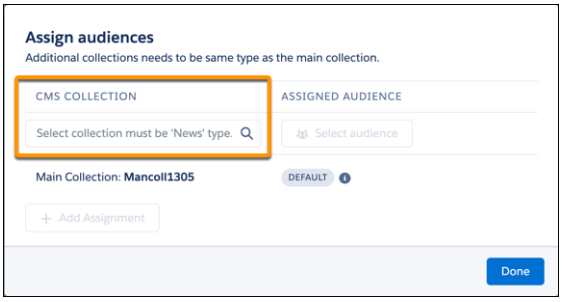
Use audiences to vary the content that users see within the CMS Collection, Navigation Menu, or Tile Menu components. For example, show one navigation menu to your site members and a more abbreviated navigation menu to guest users. Or show different CMS content to internal employees and external partners.

When you assign an audience to a CMS Collection component variation on page 493, you can determine which CMS content that audience sees within the component. When you assign an audience to a Navigation Menu or Tile Menu component variation on page 494, you can determine which items appear in the navigation menu for that audience.

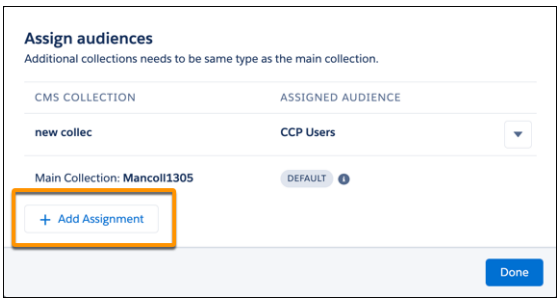
You can assign only one audience to each component variation. To prioritize audiences for component variations, see Prioritize Audiences in Aura Sites.

Assign an Audience to a CMS Collection

1. In Experience Builder, click the CMS Collection component that you want to work with.
2. In the component's properties panel:
   - If no CMS collection has been added to the component, click **Add Collection**, select a collection, and click **Personalize**.
   - If a CMS collection has been added to the component, click **Personalize**.
3. In the first Assign audiences window:
   - If no collection has an assigned audience, click in the CMS Collection field, and select a collection from the menu.



   - If an audience is already assigned to at least one collection, click **Add Assignment**, click in the CMS Collection field, and select another collection from the menu.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

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  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

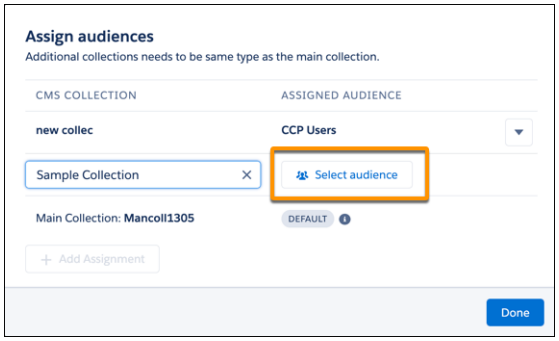
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

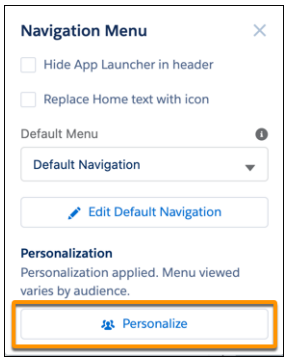
4. Click **Select audience** for the collection.



5. In the second Assign Audience window:
   - To create an audience, click **New Audience**. Name the audience, set the criteria to define it, select the conditions when the audience matches, and click **Save & Assign**.
   - To assign an existing audience, select the audience, click **Assign**, and click **Done**.
6. To assign an audience to another CMS collection, click **Add Assignment**, and follow steps 3–5. Otherwise, click **Done**.
7. To make these changes visible to your site visitors, publish the site.

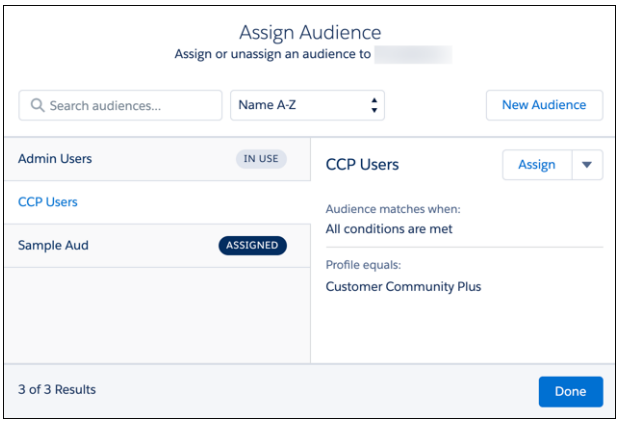
Assign an Audience to a Navigation Menu or Tile Menu

1. In Experience Builder, click the Navigation Menu or Tile Menu component that you want to work with.
2. In the component's properties panel:
   - If no default menu has been selected in the Default Menu field, select one. Then click **Personalize**.
   - If a default menu has been selected, click **Personalize**.



3. In the first Assign audiences window:
   - If no navigation menu has an assigned audience, click in the Menu field, and select a navigation menu.
   - If at least one navigation menu has an assigned audience, click **Add Assignment**, click in the Menu field, and select another menu.
4. Click **Select audience** for the menu.
5. In the second Assign Audience window:

- To create an audience, click **New Audience**. Name the audience, set the criteria to define it, select the conditions when the audience matches, and click **Save & Assign**.
- To assign an existing audience, select the audience, click **Assign**, and click **Done**.



6. To assign an audience to another menu variation, click **Add Assignment**, and follow steps 3–5. Otherwise, click **Done**.
7. To make these changes visible to your site visitors, publish the site.

SEE ALSO:

Considerations for Audience Targeting in Aura Sites

Criteria Types and Conditions for Audience Creation

Create an Audience for an Aura Site

Assign an Audience to a Component

Prioritize Audiences in Aura Sites

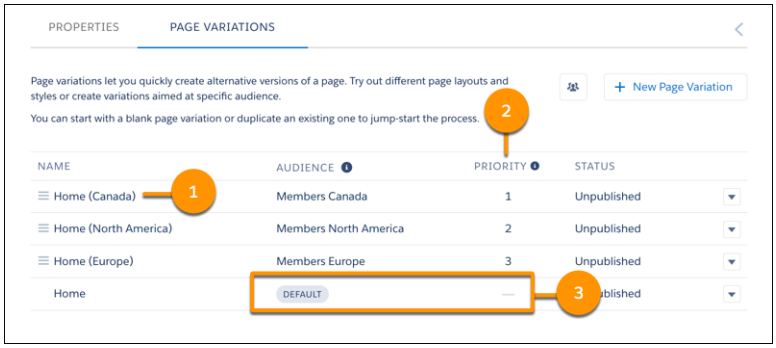
Prioritize Audiences in Aura Sites

When site visitors meet the criteria for more than one audience, you can prioritize which page variation, branding set, navigation menu, or CMS collection they see. To prioritize audiences, at least two audiences must be assigned to the page variation, branding set, or component variation.

Prioritize Audiences for Page Variations

Let's say you have a page variation for all North American site members and one specifically for Canadian members. Canadian site members meet the criteria for two audiences, the broader North American audience and the more narrowly targeted Canadian audience. To prioritize which variation of the page is visible to Canadian members, adjust the order of the pages in the Page Variations panel.

1. In Experience Builder, open the Pages menu in the top toolbar, hover over the page that you want to work with, and click the Page Actions icon.
2. Click **Page Settings**, and open the Page Variations tab.
3. Drag the page variation that you want to show to the more narrowly targeted audience (1) into the first position on the priority list (2). In this case, the Home (Canada) page, assigned to your Members Canada audience, is in the first position on the priority list.



4. Drag the page for the more broadly defined audience into the second position on the priority list. In this case, the Home (North America) page, assigned to your Members North America audience, is in the second position on the priority list.

In this example, all site members in Canada now see the Canadian home page because it has first priority. Everyone else in the Members North America audience sees the North American home page. Site members who don't fall into any audience see the default home page (3).

Prioritize Audiences for Branding Sets

To vary the style and appearance of your site for different audiences, the process is similar. Let's see how that works for the Canadian and North American audiences.

1. In Experience Builder, open the Theme panel, click the down arrow next to the panel title, and select **Manage Branding Sets**.
2. In the Branding Sets panel, click the list view option (1).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

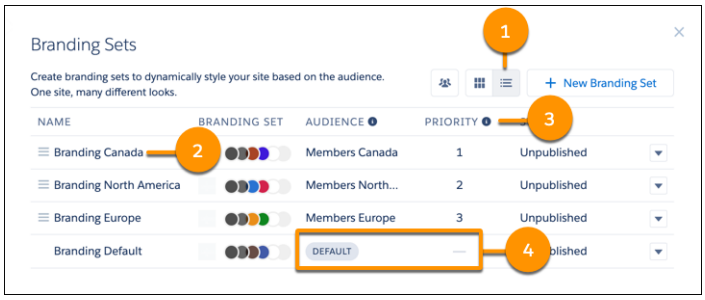
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



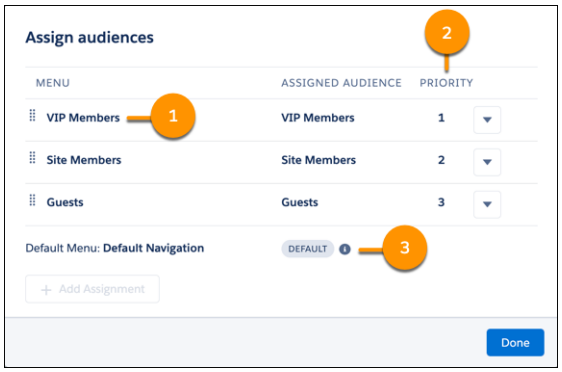
3. Drag the branding set that you want to show to the more narrowly targeted audience (2) into the first position on the priority list (3). In this case, the Canadian branding set, assigned to your Members Canada audience, is in the first position on the priority list.
4. Drag the branding set for the more broadly defined audience into the second position on the priority list. In this case, the North American branding set, assigned to your Members North America audience, is in the second position on the priority list.

In this example, all site members in Canada now see the look and feel of your site that you designed specifically for your Canadian audience. Everyone else in the Members North America audience sees the site branding that you designed for the broader North American audience. Site members who don't fall into any audience see the look and feel that you designed for your default branding set (4).

Prioritize Audiences for Component Variations

To prioritize audiences for component variations, the process is the same for the CMS Collection, Navigation Menu, and Tile Menu components. Let's say that you have separate navigation menus for regular and VIP site members. Your VIP site members meet the criteria for two audiences, the broader Site Members audience and the more narrowly targeted VIP Members audience. To ensure that your VIP members see their special navigation menu, prioritize the variations for the menu component.

1. In Experience Builder, click the component.
2. In the component's properties panel, click **Personalize**.
3. Drag the more narrowly targeted component variation (1), into the first position on the priority list (2). In this case, the VIP Members audience is in the first position on the priority list.



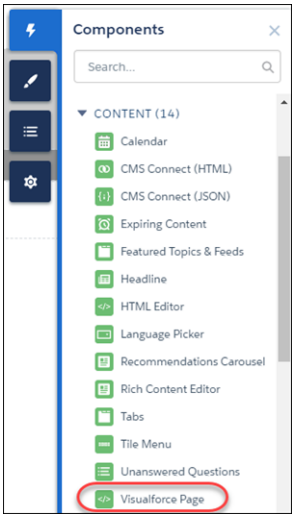
4. Drag the more broadly targeted component variation into the second position on the priority list. In this case, the Site Members audience is in the second position on the priority list.

In this example, VIP site members now see their special navigation menu because that component variation has first priority. Users who visit your site and don't fall into any specified audience see the default navigation menu (3).

Use Visualforce in Experience Builder Sites

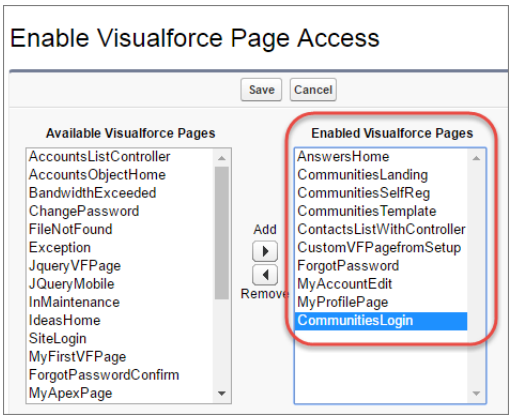
If you created Visualforce pages, actions, buttons, links, and canvas apps for your Salesforce Tabs + Visualforce template-based sites, you can use them in Experience Builder sites.

Note: To include a Visualforce page on a site page, use the Visualforce Page component in Experience Builder.



For example, say that you have the Salesforce CPQ app installed in your org. You can create a quote detail page and use the Visualforce Page component to display the quote line editor or other pages. If you have configured actions, buttons, and links associated with standard or custom objects, they work in sites as well. And canvas app overlays let you host third-party applications in your site.

1. Give Visualforce page access to users by profile.
   a. From Setup, enter `Profiles` in the Quick Find box, then select **Profiles**.
   b. Click the name of the profile that you want to modify.
   c. On the Profile page, in the Enabled Visualforce Page Access section, click **Edit**.
   d. In the Available Visualforce Pages list, select the Visualforce pages that you want to make available to this profile, and click **Add**.



   e. Save your changes.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

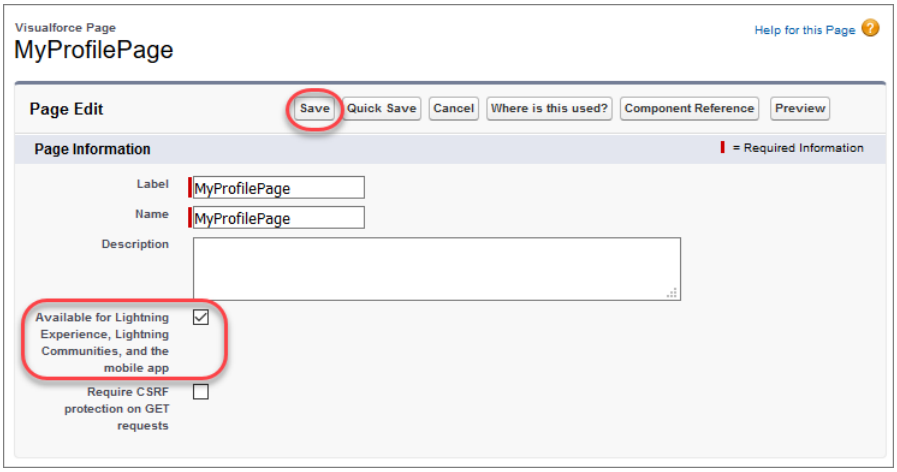
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

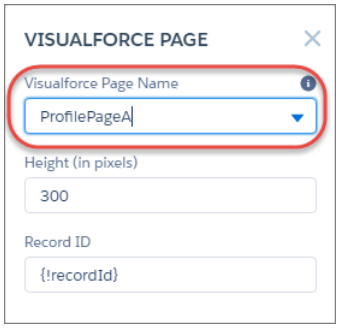
- Be a member of the site AND an experience admin or publisher in that site

2. Make the Visualforce page available for your site.
   a. From Setup, enter `Visualforce` in the Quick Find box, then select **Visualforce Pages**.
   b. Click **Edit** for the page that you want to make available for your site.
   c. Select **Available for Lightning Experience, Experience Builder sites, and the mobile app**, and save the change.



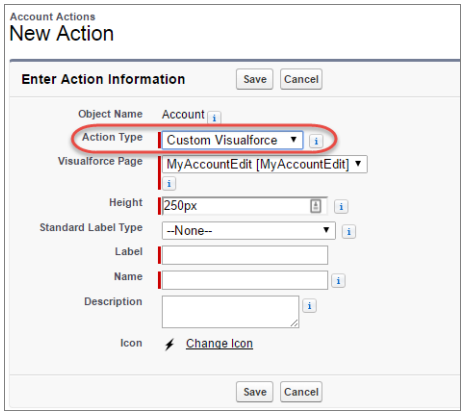
If you want to use the page in an Experience Builder template, make sure that **Require CSRF protection on GET requests** isn't selected, because it prevents the page from rendering.

Visualforce Page Component—To add a Visualforce page to your Customer Service site, drag the Visualforce Page component from the Components panel to the page. In the property panel, select the Visualforce page that you want to use.



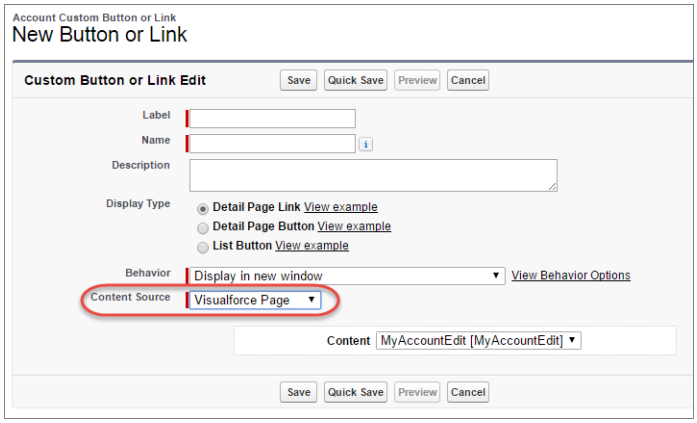
Tip: If the Visualforce page requires the Record ID from an object such as Account, create object pages for Account. Then drag the Visualforce Page component onto the object's detail page. The Record ID field adjusts to the object's ID.

Custom Actions—If you have custom actions with an action type of **Custom Visualforce** associated with a Visualforce page, these actions work in published sites. When users click the action button, the associated Visualforce page is displayed.



Important: Visualforce overrides to standard actions such as View, New, Edit, and Delete aren't supported in sites. These buttons on record detail pages don't display in sites.

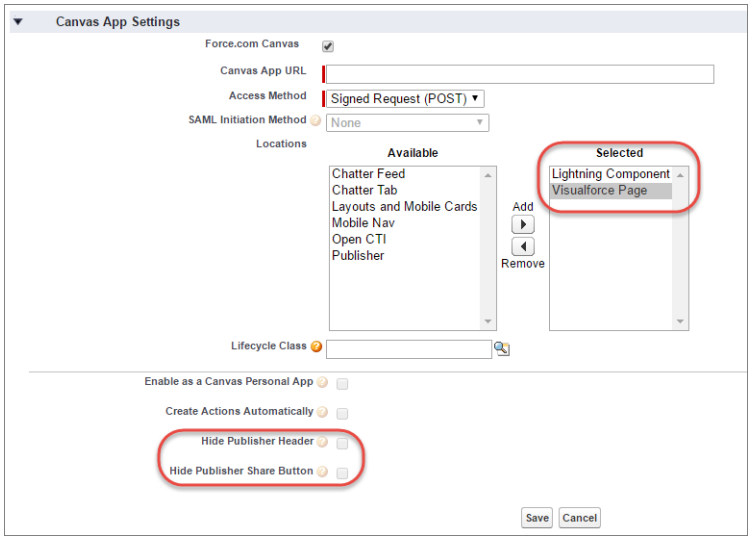
Custom Buttons and Links—If you have custom buttons and links with a content source of Visualforce Page, these buttons and links work in published sites. When users click the button or link, the associated Visualforce page shows.



Note: The Behavior setting for custom buttons and links isn't supported. When users click custom buttons in published sites, the Visualforce page is always displayed in the current window.

Experience Builder sites don't support custom list buttons with a URL source, and they don't support Visualforce custom list buttons.

Canvas Apps—You can use canvas apps as custom actions to give users access to the functionality of your apps in sites. Configure your canvas app for Lightning Component and Visualforce Page in Canvas App Settings. You can then load the canvas app inside a Visualforce page, Visualforce action, and Lightning components in published sites.



Note: Canvas apps and quick actions aren't supported for guest users. They're supported on sites only for logged-in users.

You can opt to hide the publisher header and publisher Share button in Canvas App Settings.

Best Practices for Using Visualforce in Experience Builder Sites

- Site Branding—When developing your Visualforce page code, set the `showHeader` attribute to `true`. That way, branding properties that you set in **Administration** > **Branding** in Experience Workspaces also apply to the Visualforce page component in your Customer Service site. To modify the default gray background for Visualforce components, change the Header Background property on the Branding page.
- Mobile—To enable Visualforce pages to display site branding on mobile, set `standardStylesheets=true` or `showHeader=true` in your Visualforce page code.
- URLs—If your Visualforce page contains links to other Visualforce pages, ensure that the Visualforce markup includes `http://` or `https://` at the start of the URL. Also, if your page is locked in a frame, use the `target="_top"` attribute to open the page in the full body of the window. For example,

  ```
  <a href="https://yourVFpageURL.com" target="_top" >Name of Visualforce Page</a>
  ```

- JavaScript Sources—Use JavaScript sources such as `connection.js`, `apex.js`, `debugshell.js`, and `util.js` in Visualforce pages in either of the following ways:

  ```
  <apex:includeScript value="/soap/ajax/36.0/connection.js"/>
  ```
  or

  ```
  loadScript("/soap/ajax/36.0/connection.js")
  ```

- Images—Hard-coded image URLs in Visualforce pages aren't supported in Experience Builder preview. We recommend that you upload images as static resources as follows:

  ```
  <img alt="{{msg.severity}}" class="msgIcon" src="{!$Resource.spacerImage}"
  title="{{msg.severity}}"/>
  ```

- Standard Page Layouts—Visualforce pages embedded in standard page layouts aren't supported in Experience Builder sites.
- Custom Theme Layouts—Visualforce pages always use the default theme layout when rendered in an Experience Builder site, even if you've applied a custom theme layout to your site pages.

Add Streams to Your Experience Builder Site

Your site users can combine multiple feeds into a stream to create a single point of access to related information. Combine feeds of top contributors or discussions concerning a particular product line. Create a stream that combines feeds from discussions, groups, topics, profiles, and all kinds of objects, like cases, opportunities, and accounts. No more jumping from feed-to-feed to get a sense of what people are saying. Each member can create up to 100 streams.

In the Experience Builder, add the Stream List page to navigation, and you're done.

1. In your site, open Experience Builder.
2. Click the navigation bar, and then click **Navigation Menu**.
3. Click **Add Menu Item**.
4. In the Menu Item panel, enter a name for the Stream List page, for example, `STREAMS`.
5. For **Type**, select `Community Page`.
6. For **Page**, select `Stream List`.
7. Choose whether to make the Stream List page publicly available.
8. Click **Publish**, and then click **Publish** again.
9. In the banner, click **Publish**, and then, in the confirmation dialog, click **Publish** again.

   Site users have access to tools for creating and viewing their own streams.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

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  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

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  OR

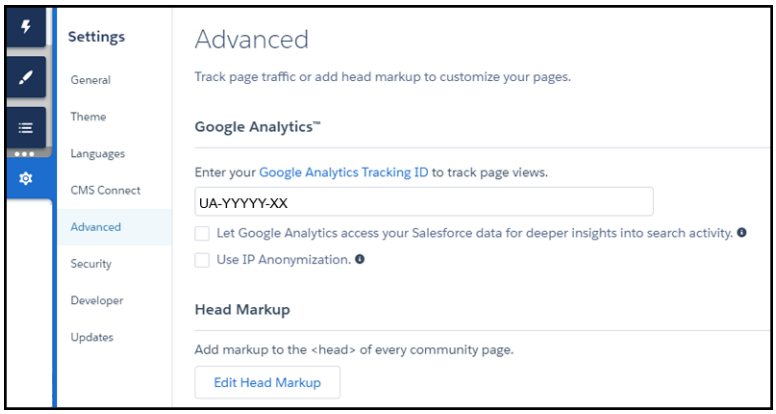
- Be a member of the site AND an experience admin or publisher in that site

Track Site Users with Your Google Analytics Tracking ID

Add your Google Analytics™ tracking ID to track page views. Enable access to your Salesforce data for deeper insights. Then, adjust your pages to more accurately reach your customers.

To track using Google Analytics:

1. In Experience Builder, click on the left sidebar and click **Advanced**.
2. Enter your Google Analytics tracking ID.



3. To track user types, user IDs, and search activity, enable **Let Google Analytics access your Salesforce data for deeper insights into search activity**.
4. To enable the masking of IP addresses on the Google server side, which helps with privacy compliance or concerns, **Use IP Anonymization**.
5. To enable the service, publish the site.

Your site's analytics data streams directly to the Google Analytics service where you can review and interpret it.

After you've set up Google Analytics to integrate with your data, you can create your own reports.

For developers of custom Lightning components, we provide the `global forceCommunity:analyticsInteraction` event. Use this event to track events triggered by the custom component.

Configure Google Analytics™ for Experience Cloud Sites

Set up Google Analytics to track user IDs, user types, and search activity so this information can be pulled into meaningful reports.

SEE ALSO:

Lightning Components Developer Guide: forceCommunity:analyticsInteraction

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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- Be a member of the site AND an experience admin or publisher in that site

Configure Google Analytics™ for Experience Cloud Sites

Set up Google Analytics to track user IDs, user types, and search activity so this information can be pulled into meaningful reports.

Google Analytics integrates with your self-service site to track user types, user IDs, page views on Salesforce objects, and customer search activity. To capture this information correctly, some initial setup is required.

1. In Experience Builder, go to **Settings** > **Security**. Under **Content Security Policy**, choose **Allow Inline Scripts and Script Access to Whitelisted Third-party Hosts**.
2. Go to **Settings** > **Advanced** and enter your Google Analytics ID.

   For more information about the Google Analytics ID, check the Google Analytics documentation.
3. Select **Let Google Analytics access your Salesforce data for deeper insights into search activity**.

   This step lets Google Analytics track user types, user IDs, and customer search activity in your site.
4. To enable the masking of IP addresses on the Google server side, select **Use IP Anonymization**.

   Masking IP addresses helps with privacy compliance and concerns.
5. Create custom dimensions in your Google Analytics account that capture user type and Salesforce object information.
   a. From your Google Analytics account, go to **Admin** > **Property** > **Custom Definitions** > **Custom Dimensions**, and click **+New Custom Dimension**.
   b. For the first index you want to use, enter the name `User Type` and select **Hit** for the scope.
   c. For the second index, enter the name `Salesforce Object` and select **Hit** for the scope.

   Note: The Google Analytics console auto assigns sequential indexes based on how many variables you created. Configure the custom dimension indexes in the site so that they match the indexes of the newly created variables.
6. Create a User-ID view.

   With the User-ID view, you can analyze how specific segments of traffic with an assigned ID engage with your content.
   a. Go to **Admin** > **Property** > **Tracking Info** > **User-ID** and follow the instructions.
   b. For the User-ID view, enter the name `User Explorer`.
7. To track the way different types of users are interacting with the site, click **Reporting** > **Audience** > **User Explorer** > **User Flow**.

After you integrate Google Analytics, you can install the preconfigured Google Analytics for Salesforce Communities package or create your own reports.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

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  OR
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

Multilingual Sites

Experience Builder lets you create different language versions of your site to serve separate international audiences. For example, let's say that you have customers in France and Germany. You can deliver the same site experience to each in the language that's appropriate for their region.

When you create a multilingual site, you don't have to create a separate site for each language. And there's also no need to duplicate pages within the site for each language. Instead, Experience Builder lets you add translated content to the *properties* of each component. Translating content through properties lets you maintain all languages within the site.

After you choose which languages you want your site to support, an in-built language menu lets you switch between languages when editing component properties. Content editing is quick and easy because you never have to leave the page to change to another language.

Alternatively, if you use a translation service, you can export site content as an .xml file and send it for translation. After you receive the edited file, simply import it back into your site to populate each page component with the translated content.

You can also apply your own Google Cloud Translation API key to integrate Google Translate into your feeds. Give your site the ability to instantly translate posts, questions, polls, and their comments, answers, and replies.

Create a Multilingual Site

Creating a multilingual site involves a few main steps. Define the languages that you want your site to support. Add translated content for each language. And enable site visitors to choose their preferred language.

Set the Default Language for Your Aura Site

The default language is the language that's used in a site before a user has selected another language. By default, the default language is set to English (US).

Add Languages to Your Aura Sites

Add the languages that you want your site to support.

Set Language Options

After you add Experience Builder sites languages, you can define separate settings for each language.

Edit Language Content on the Page

Experience Builder provides its own language menu that you can use to switch between languages as you edit content on each page. Switch languages and provide spot translations, like fixing a typo. You can also use this method for full page translations instead of exporting and importing site content.

Export Language Content

Export and prepare Experience Builder site content as one or multiple .xml files. Prepare the files for translation by creating nodes for specific languages. Then send the file to your translation service.

Import Translated Content

After your translation service has completed the translations, import the translated .xml file into your Experience Builder site.

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience, Salesforce Classic, and mobile devices, and is available in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Delete a Language

When you delete a language, the translated content isn't deleted—it's just no longer visible. When you add the language back to the Experience Builder site, you can access the translated content again.

Best Practices and Considerations for Multilingual Sites

Keep these practices and considerations in mind when you're setting up a multilingual site.

Add a Translate Button to Feed Items in Experience Builder Sites

A translation setting in Experience Builder puts a Translate with Google menu on every feed item. Translations are offered through a Google Cloud Translation API key that you provide.

SEE ALSO:

Blog post: Localization within Experience Cloud Sites

Language Selector

Create a Multilingual Site

Creating a multilingual site involves a few main steps. Define the languages that you want your site to support. Add translated content for each language. And enable site visitors to choose their preferred language.

Here's an overview of the steps to take to create a multilingual site.

1. Set the default language for your site. It's important to set the default language before you add translated content to your site.
2. Add languages to the site.
3. Set options for each language, such as the display label and fallback language.
4. Export and prepare the content, and send it for translation. Alternatively, you can translate content directly on the page in Experience Builder.
5. Import the translated content.
6. Add a Language Selector component to your site pages, so unauthenticated users can choose their preferred language.

   Tip: Consider offering users a way to get instant translations of feed items. (Feed items include posts, questions, polls, and their comments, answers, and replies.) For more information, see Add a Translate Button to Feed Items in Experience Builder Sites on page 519.

SEE ALSO:

Best Practices and Considerations for Multilingual Sites

EDITIONS

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Set the Default Language for Your Aura Site

The default language is the language that's used in a site before a user has selected another language. By default, the default language is set to English (US).

Before you add any language content to your site, you must set the site's default language. A site's default language isn't the same as the default language setting in your Salesforce org. This behavior is deliberate. Let's say you have multiple sites and want a different default language for each. At the same time, you want your org default language to be consistent. With a separate default language for your org, it's easy to set things up this way.

1. In Experience Builder, click > **Languages**.
2. Select a language from the Default Site Language list.

   Note: If you plan to add Salesforce CMS content to your site, it's important that the site and the CMS workspace have the same default language so that the content appears properly. If the default languages are different, translate the content in your CMS workspace into your default site language, then add the translated content to your site.

3. Optionally, click **Edit display label**, and change the way the selected language label appears. For example, you can use this opportunity to translate the language's display label.

Important: If you decide to change a site's default language after you add translated content, do so in this order:

1. Export site content.
2. Change the default language.
3. Import the exported file.

Changing the default language can overwrite existing translations. So you export first to preserve your original default language and your translations. After you change the default, you can import translations to restore them.

Here's how it works. Let's say you make English the default language and add French as a site language. After you add the translated French content, you decide to change the default site language to French. To preserve your original default language and existing translations, you must first export. Then, select French as the default site language, and import content back into the site.

SEE ALSO:

Add Languages to Your Aura Sites

Set Language Options

Translate Salesforce CMS Content

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

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Add Languages to Your Aura Sites

Add the languages that you want your site to support.

1. In Experience Builder, click > **Languages**.
2. Click **Add Languages**.
3. Select the languages that you want to add to your site.
4. Rearrange the list in the order that you want languages to appear.
5. Save your changes.
6. Optionally, for each language, select a fallback language.

   The fallback language is the language to use when a page doesn't have a translation for the language that the user selects. For example, imagine that a visitor chooses to view a page in French (CA), but there isn't content for that page in French (CA). The fallback language is shown instead.

   a. Under Site Languages, select a language.

   b. From the **Fallback Language** field, select a fallback language.

After you add a language to the site, the Language icon appears in the Experience Builder toolbar. Click it to switch between languages when previewing or editing page content.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

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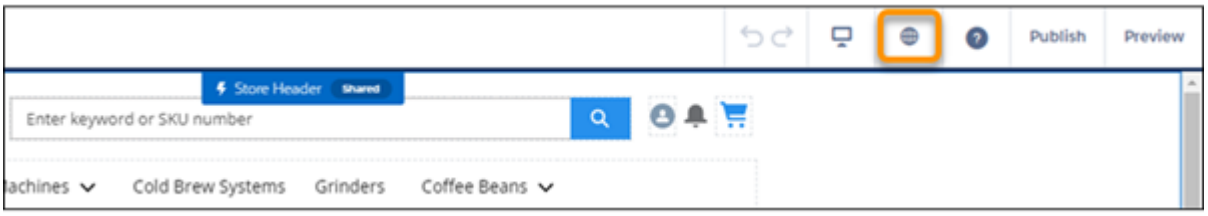

Tip: Consider offering users a way to get instant translations of feed items. (Feed items include posts, questions, polls, and their comments, answers, and replies.) For more information, see Add a Translate Button to Feed Items in Experience Builder Sites on page 519.

SEE ALSO:

Set the Default Language for Your Aura Site

Edit Language Content on the Page

Set Language Options

Delete a Language

Set Language Options

After you add Experience Builder sites languages, you can define separate settings for each language.

1. In Experience Builder, click > **Languages**.
2. Under Site Languages, select a language.
3. Update any of the following settings:

Option	Description
Active	If you add a Language Selector component to your active site, this checkbox controls whether the selected language appears in the list. Use this setting to hide a language until you're ready to release the associated content to your site visitors.
Fallback Language	The fallback language appears when no content is available for the currently selected language. For example, imagine that a site visitor chooses Japanese from the language selector but your site doesn't have a Japanese translation for that page. In that case, content is shown in the fallback language. Only one level of fallback language is supported for LWR sites. For example, if French (Canadian) falls back to French, then your site's default language is the only fallback language allowed for French.
Display Label	You can define a display label for each language. The display label appears in any Language Selector components that you add to your site and in the Experience Builder's built-in language menu.

SEE ALSO:

Add Languages to Your Aura Sites

Set the Default Language for Your Aura Site

EDITIONS

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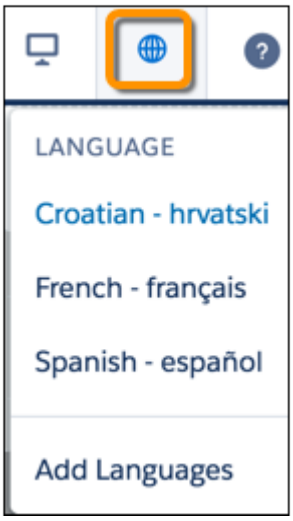
- Be a member of the site AND an experience admin or publisher in that site

Edit Language Content on the Page

Experience Builder provides its own language menu that you can use to switch between languages as you edit content on each page. Switch languages and provide spot translations, like fixing a typo. You can also use this method for full page translations instead of exporting and importing site content.

1. Open the page you want to translate, and select a language from the Experience Builder language menu.



2. To access component properties, select the component on the page.
   By default, all component properties use the default site language, which is the language that you see until you add translated content.
3. Enter the translated content in the property fields.

Note: Experience Builder doesn't validate languages as you enter content. Take care to add the correct content for the selected language.

EDITIONS

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Export Language Content

Export and prepare Experience Builder site content as one or multiple .xml files. Prepare the files for translation by creating nodes for specific languages. Then send the file to your translation service.

Before you begin, let's look at the structure of the .xml file that's created when you export language content. The file consists of several elements, and these elements are the key ones to focus on.

- `component` elements represent the page components that make up your site. Many of these components contain text that must be translated.
- The `field` element contains the component's properties for a particular language. The language is defined by the `language` attribute.
- `property` elements include `CDATA` tags that contain the text strings for translation.

  As you can see in this sample XML for a component, several `CDATA` tags don't contain any content. So the only `CDATA` tags that you and your translators must focus on are the ones that contain text.

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```
<component context="Contact Support Form (Aura)"
documentId="2342fd59-55da-5bdd-b013-d0a3cb6ce523" id="1242fd59-76da-4cdd-b025-d0a3cb6ce496">

    <field name="AuraAttributes" language="en_US" exportcrc="811168867">
        <property name="requestSummaryText"><![CDATA[Case summary]]></property>
        <property name="callToActionText"><![CDATA[]]></property>
        <property name="headerSubtitle"><![CDATA[Tell us how we can help.]]></property>
        <property name="callToActionButtonText"><![CDATA[]]></property>
        <property name="confirmationText"><![CDATA[Your case was created.]]></property>
        <property name="confirmationSubtext"><![CDATA[We'll get back to you
```

```
soon.]]></property>
        <property name="headerTitle"><![CDATA[Contact Customer Support]]></property>
    </field>
</component>
```

Note: If you exported your site content for translation before Winter '22, you can't import the resulting translated file. To ensure a successful import, export your site content again and translate it in this more recent .xml file.

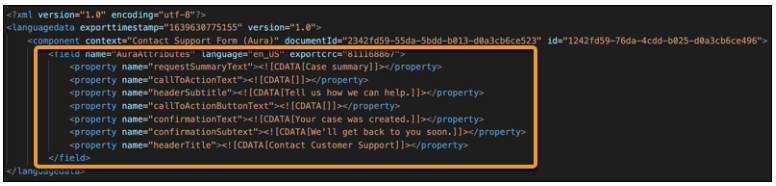
To export and prepare content for translation:

1. In Experience Builder, click > **Languages**.
2. Click **Export Content**.
3. Select your default language.

   You can select a language other than your default language, but we don't recommend it unless you must export existing translations for that particular language. If you haven't yet added translations for the language, the exported file is empty.
4. (Optional) Change the export file name.

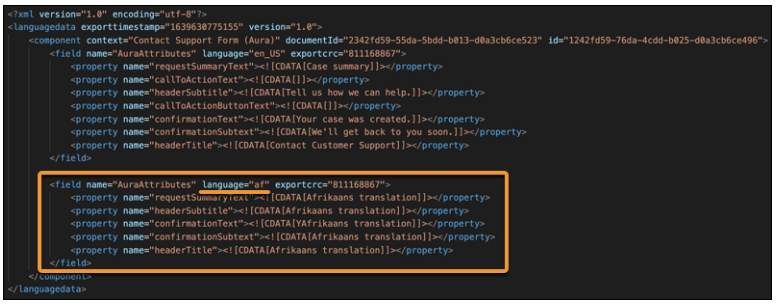
   The default name of this file is `Languages.xml`, but you can rename it. Consider exporting a file for each translation and renaming each file by its country code. For example, if you intend to get translations for French, German, and Spanish, you can rename the files `language_fr.xml`, `language_de.xml`, and `language_es_mx.xml`, respectively.
5. Click **Export**.
6. If you're prompted to, choose where to save the file.
7. Prepare the .xml file for translation.

   a. Copy the `field` element for the content to be translated, and paste the copy under the original.



   You can copy a `field` element multiple times for multiple translations in one file. However, to reduce the chance of overwriting existing translations when importing new ones, we recommend that you export a separate `Languages.xml` file for each translation.

   b. Update the `language` attribute in the pasted `field` element to the new language.



c. Save your changes.

After you export and prepare the .xml file, you can send it for translation. Ask your translators to put translated content between the brackets that follow the `CDATA` tags.

```
<?xml version="1.0" encoding="utf-8"?>
<languagedata exporttimestamp="1639630775155" version="1.0">
    <component context="Contact Support Form (Aura)" documentId="2342fd59-55da-5bdd-b013-d0a3cb6ce523" id="1242fd59-76da-4cdd-b025-d0a3cb6ce496">
        <field name="AuraAttributes" language="en_US" exportcrc="811168867">
            <property name="requestSummaryText"><![CDATA[Case summary]]></property>
            <property name="callToActionText"><![CDATA[]]></property>
            <property name="headerSubtitle"><![CDATA[Tell us how we can help.]]></property>
            <property name="callToActionButtonText"><![CDATA[]]></property>
            <property name="confirmationText"><![CDATA[Your case was created.]]></property>
            <property name="confirmationSubtext"><![CDATA[We'll get back to you soon.]]></property>
            <property name="headerTitle"><![CDATA[Contact Customer Support]]></property>
        </field>

        <field name="AuraAttributes" language="af" exportcrc="811168867">
            <property name="requestSummaryText"><![CDATA[Afrikaans translation]]></property>
            <property name="headerSubtitle"><![CDATA[Afrikaans translation]]></property>
            <property name="confirmationText"><![CDATA[YAfrikaans translation]]></property>
            <property name="confirmationSubtext"><![CDATA[Afrikaans translation]]></property>
            <property name="headerTitle"><![CDATA[Afrikaans translation]]></property>
        </field>
    </component>
</languagedata>
```

If possible, avoid updating the site's default content until after you receive and import your translated content. Because the translated file contains the original default content and the translated content, when you import the file, you overwrite updates made in the interim.

Note: Keep this consideration in mind for translations when you make a new property of a custom component available for edit in Experience Builder: If the component is in use on a page in Experience Builder, delete the component from the page and replace it with the updated version. Otherwise, when you export the site content for translation, the property that you added is omitted for that component instance in the exported file. If the component contains content that's already translated, export the site content first to preserve the existing translation. Then replace the component with the updated version. For more information, see Aura Component Bundle Design Resources or, for Lightning web components, Configure a Component for Experience Builder.

When you receive the translated .xml file, import it back into the site.

SEE ALSO:

Import Translated Content

Import Translated Content

After your translation service has completed the translations, import the translated .xml file into your Experience Builder site.

Don't update your site's default content until after you import the translated content. The translated file contains the original default content and the translated content. When you import the translated file, the import overwrites any changes that you made to the default content while the content was with your translation service.

Note: If you exported your site content for translation before Winter '22, you can't import the resulting translated file. To ensure a successful import, export your site content again and translate it in this more recent .xml file.

1. In Experience Builder, click > **Languages**.
2. Click **Import Translation**.
3. Browse to the file or drag it onto the window.
   For files under 1 MB, a message tells you whether the content was imported successfully. For files over 1 MB, you receive an email when the import process finishes.

Warning: Import overwrites the current translation values in your site. Before you import an .xml file, ensure that the file matches the expected format and is well formed.

After you import the translated content, test your pages to make sure that content displays correctly. Use the language selector to view each page in a supported language.

SEE ALSO:

Export Language Content

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience, Salesforce Classic, and mobile devices, and is available in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Delete a Language

When you delete a language, the translated content isn't deleted—it's just no longer visible. When you add the language back to the Experience Builder site, you can access the translated content again.

1. In Experience Builder, click > **Languages**.
2. Under Site Languages, click next to the language that you want to delete.

SEE ALSO:

Add Languages to Your Aura Sites

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience, Salesforce Classic, and mobile devices, and is available in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Best Practices and Considerations for Multilingual Sites

Keep these practices and considerations in mind when you're setting up a multilingual site.

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience, Salesforce Classic, and mobile devices, and is available in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

General Best Practices and Considerations

- Set the site's default language before you begin adding translated content to your site.
- For each translation, export a separate `Languages.xml` file to reduce the chance of overwriting any existing translations when importing new translations. For easier identification, we recommend renaming each file to include its country code—for example, `languages_de.xml`, `languages_fr_ca.xml`.
- When preparing files for translation, ensure that the file contains the default language and only one other language. When you import the file after translation, this best practice helps avoid overwriting any other languages.
- If possible, avoid updating the site's default content until after you receive and import your translated content. Because the translated file contains the original default content and the translated content, when you import the file, you overwrite any updates made in the interim.
- If you decide to change a site's default language after you add translated content, do so in this order:
  1. Export site content.
  2. Change the default language.
  3. Import the exported file.

  You export first because changing the default language can overwrite existing translations. Export first to preserve your original default language and your translations. Then, after changing the default, import translations to restore them.

  Here's how it works. Let's say that you make English the default language and add French as a site language. After you add the translated French content, you decide to change the default site language to French. To preserve your original default language and existing translations, you must first export site content. Then select French as the default site language, and import content back into the site.
- For custom components, when you make a new property available for edit in Experience Builder, keep this consideration in mind for translations: If the component is in use on a page in Experience Builder, delete the component from the page and replace it with the updated version. Otherwise, when you export the site content for translation, the property that you added is omitted for that component instance in the exported file. If the component contains content that's already translated, export the site content first to preserve the existing translation. Then replace the component with the updated version. For more information, see Aura Component Bundle Design Resources or, for Lightning web components, Configure a Component for Experience Builder.

Best Practices and Considerations for Guest Users

- Add a language selector to all public pages, and make it easy to spot. It's the only way that guest users and unauthenticated visitors can select their language.
- For pages that require authentication, we automatically show page content in the authenticated user's default language.
- Customized labels and Knowledge articles use the translations that the site admin added in Translation Workbench.

SEE ALSO:

Blog post: Localization within Experience Cloud Sites

Language Selector

Add a Translate Button to Feed Items in Experience Builder Sites

A translation setting in Experience Builder puts a Translate with Google menu on every feed item. Translations are offered through a Google Cloud Translation API key that you provide.

Before you configure translation, go to https://cloud.google.com/translate, and get your translation key.

Note: Google Cloud Translation is a subscription service. For pricing information, see https://cloud.google.com/translate/pricing.

Take these steps to add a Google Cloud Translation API key to your site.

1. In Experience Builder, go to **Settings** > **Languages** and enter your Google Cloud Translation API key.
2. Click **Validate & Save Key**.

   This action checks the validity of your key, and, if valid, saves your setting.

After you verify and save your key, a **Translate with Google** menu appears on all feed items in your site. Feed items include posts, questions, polls, and their comments, answers, and replies.

- To translate the feed item into the default language, click **Translate with Google**.

  For site members, the default language comes from the locale that's set on the user's profile. For guest users, it comes from the locale that's set in the user's browser.
- To select a language, click the menu icon and select a language from the list.

These languages appear on the translation list.

Albanian	Arabic	Armenian	Basque	Bengali
Bosnian	Bulgarian	Catalan	Chinese Simplified	Chinese Traditional
Croatian	Czech	Danish	Dutch	English
Estonian	Finnish	French	Georgian	German
Greek	Hebrew	Hindi	Hungarian	Icelandic
Indonesian	Irish	Italian	Japanese	Korean
Latvian	Lithuanian	Luxembourgish	Macedonian	Malay
Maltese	Montenegrin	Norwegian	Polish	Portuguese
Romanian	Romansh	Russian	Serbian	Slovak
Slovenian	Spanish	Swedish	Tagalog	Tamil
Thai	Turkish	Ukrainian	Urdu	Vietnamese
Welsh	—	—	—	—

After translation, **Translate with Google** switches to **View Original**, so it's easy to switch back to the original language.

EDITIONS

Available in: Experience Builder sites accessed through Lightning Experience, Salesforce Classic, and mobile devices, and is available in **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To configure feed translations in a site

- Is a System Administrator OR has the permission
- Manage Experiences OR Create and Set Up Experiences
- AND is a member of the site

Improve Experience Cloud Site Performance

Analyze your Experience Cloud site's volume, traffic, and transaction loads to determine if your site could benefit from the many performance optimization tools available.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

The Scale of Your Experience Cloud Sites

Large-scale sites are more than just sites that support a large volume of users. Transaction loads, and heavy traffic patterns also impact the scale of a site. Large-scale sites can benefit from performance and scale optimization tools. Your account representative can advise you on which performance and scale optimizations to enable.

Scale and Performance Optimization Tools for Experience Builder Sites

Salesforce performance tools help ensure that your high-traffic sites and large-scale B2B and B2C applications perform well and deliver lightning fast response times. Each tool has been tested and developed to meet specific scale and performance needs.

Which Performance Tools Do I Need Based on My Experience Cloud Site?

With Experience Cloud, you can build a wide range of business-to-consumer (B2C) and business-to-business (B2B) applications that have different performance and scale considerations and optimizations. This section outlines common scenarios, likely performance issues, and the best tools to optimize performance.

High-Volume Self-Registration and Record Creation

High-volume sites often involve heavier than usual registration traffic and record creation. You can process more self-registrations and record creations per second when you process them in small batches, called micro-batches, instead of one at a time. After they're submitted, the requests are collected into batches, and the batches are processed asynchronously. Processing transactions using micro-batching improves performance and keeps your site moving during heavy traffic spikes.

Progressive Rendering Overview

Progressive Rendering prioritizes the display order of your page components. With proper planning and testing, it can improve display time performance and polish your site's experience to better engage customers.

Analyze and Improve Experience Builder Site Performance

The Salesforce Page Optimizer analyzes your site and identifies issues that impact performance. Use the information to refine your design and improve site performance for your members. The Page Optimizer is a free plug-in available from the Chrome Web Store. Download and install the plug-in as you would any Chrome extension.

Improve Experience Cloud Site Performance with Browser Caching

If you use many components in your Experience Builder site, you can improve your site's performance with browser caching. Performance is about the same for the first page load, but subsequent page loads are faster. The cache is encrypted and secure.

The Scale of Your Experience Cloud Sites

Large-scale sites are more than just sites that support a large volume of users. Transaction loads, and heavy traffic patterns also impact the scale of a site. Large-scale sites can benefit from performance and scale optimization tools. Your account representative can advise you on which performance and scale optimizations to enable.

You can ask several questions to determine the scale of your site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Are You Using a License That Supports Your Users?

Salesforce has the tools to help your site serve all your users and grant them access to the data that they require. The Customer Community license is designed to handle a large volume of users who only need limited access to CRM objects. Licenses such as the role-based Customer Community Plus and the Partner Community licenses are designed to grant more access to CRM objects, but they support fewer users.

Enabling Account Role Optimization (ARO) can significantly increase the number of users that a license can accommodate. If still more roles are needed, you can configure a person account owner power user. Person account owner power users can own as many customer or partner portal accounts as are needed.

Does Your Site Have High-Volume Traffic or Transactions?

High-volume traffic can affect the performance and scale of a site, and the type of traffic matters. Here are some considerations.

Determine the percentage of unauthenticated guest users and authenticated, logged-in users, and then use the tools that suit your site traffic.

Authenticated Traffic

Are visitors logging in when accessing your site?

- How many visitors are logging in during peak traffic periods?
- How many visitors are logging in on average during routine traffic periods?
- How frequent are traffic peaks?

Unauthenticated (Guest) Traffic

Are visitors viewing content or are they registering on your site? How many visitors are registering during peak traffic times? How many visitors register on average?

- For high registrations, we recommend processing self-registration requests using micro-batching so you can register twice as many guests at a time.
- For high content viewing, set up a custom domain that uses the Salesforce content delivery network (CDN) to reduce page load times.

Tailor your performance tools based on page traffic. Which pages do visitors view most, and how many views are there during high-traffic times? How many views do your pages average?

- For high-volume traffic, the Salesforce CDN can reduce load times.
- To build a robust and lightweight platform with unparalleled performance, we recommend the Lightning Web Runtime (LWR) platform.
- For faster page load times and performance, we recommend Progressive Rendering, which improves individual page performance.

You can also tailor your performance tools based on how users interact with the content on your site. Do visitors view content, or do they create CRM object records? If many users create records, we recommend enabling high-volume record creation using micro-batching.

Evaluating site performance patterns gives insight into performance bottlenecks. And you can identify areas where increasing limits can help your site perform to the level required. For all high-volume sites, we recommend enabling Page Optimizer and regularly conducting performance and scale tests.

Does Your Site Use Many Roles?

If your high-volume site uses role-based licenses such as the Customer Community Plus and Partner Community licenses, unnecessary roles can result. Business accounts automatically create a default number of roles for each new account. Roles are created to aid in sharing data between two accounts, but not all members share data. Reducing the number of roles can improve the performance and scale of your site. Enabling Account Role Optimization (ARO) delays the creation of account roles until more than one user is added to a business account. If the account has a single user, then roles aren't created for that account. Configure person account owner power users if your site must support even more customer or partner portal accounts.

Are You Customizing the Standard Salesforce Experience?

We test our standard templates, components, and objects for performance. Your customizations tailor your experiences to meet customer needs but can affect site performance. Common customizations include adding Apex code, creating a custom page or custom components, and embedding managed packages from AppExchange. We recommend that you test for performance and scale before and after launch, and regularly thereafter, to understand your site's limits.

Are You Using Additional Services on Your Site at Scale?

Experience Cloud sites are often used in tandem with services created by Salesforce or by our independent software vendors (ISVs). Whether standard or custom, evaluate how these products perform at scale. Work with your Salesforce account representative for Salesforce product information. Contact your ISV for information about their services' performance and scale. We recommend regularly testing your Experience Cloud sites that are combined with other products for performance and scale.

Scale and Performance Optimization Tools for Experience Builder Sites

Salesforce performance tools help ensure that your high-traffic sites and large-scale B2B and B2C applications perform well and deliver lightning fast response times. Each tool has been tested and developed to meet specific scale and performance needs.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

The Salesforce Content Delivery Network

Improve page load time by serving your site with a content delivery network (CDN) such as the Salesforce CDN or a third-party CDN provider. A CDN is a geographically distributed network of servers that optimizes routing and stores cached versions of web content. When you store content in multiple hubs instead of in a central location, your site can be accessed more quickly from the closest network. And when multiple users request the same content at the same time, they're accessing it from more than one location, which reduces processing load. Using the Salesforce CDN also unlocks access to other features that can improve the customer experience.

Experience Cloud Licenses

The Customer Community license can support the greatest number of users but offers limited access to Salesforce data. The Customer Community license works well for sites with large user volume and traffic spikes but doesn't provide as much access to CRM objects or data sharing.

Customer Community Plus and Partner Community role-based licenses offer more access to data but don't support as many users as Customer Community licenses. These licenses are ideal for business-to-business and business-to-consumer sites that require users to access reports and dashboards, sales data, and advanced sharing. You can enable Account Role Optimization or the Salesforce Optimizer app to eliminate unnecessary roles. You can also configure person account owner power users if you must increase the number of users that your site can support.

Choosing the right license for your site to balance scale and product capabilities is critical to remaining operational at scale. Contact your Salesforce representative to discuss which license is best for your business needs.

High-Volume Record Creation Using Micro-Batching

Enable micro-batching to create a high-volume of records for Cases, Leads, and Custom Objects. Micro-batching creates these records in batches rather than one at a time. Asynchronously batch processing record creation is an effective way to create object records for high-traffic sites.

High-Volume Self-Registration Using Micro-Batching

Self-registration is the fastest way to register users to a site. But site performance can decrease if too many users register at the same time. Enable high-volume self-registration using micro-batching to process self-registration requests in batches rather than one at a time, and handle self-registration loads for high volume-sites more effectively.

Account Role Optimization

Role-based licenses are required for accounts to share data. But role-based licenses automatically create the default number of roles for every user created, even if they don't share data. A high volume of roles impact performance and potentially reduce scale of your site. If you anticipate sharing a high volume of data with external users, enable Account Role Optimization to avoid creating unnecessary roles. It delays account role creation until there's a second user and roles are necessary to support sharing data.

Lightning Web Runtime (LWR)

The Lightning Web Runtime (LWR) framework was developed with speed and performance in mind. It uses Lightning Web Components (LWC). Because the components are built on code that runs natively on browsers, they're lightweight and efficient. For unparalleled site performance and scale, pair Lightning Web Runtime (LWR) with the Salesforce CDN.

Apex Caching

Improve performance of your LWR site by caching public data from Apex methods. Salesforce controls caching of Apex methods used on standard pages and components, and caches data where appropriate. Control caching for your own Apex methods using caching annotation, or control caching for Apex methods in managed packages by enabling a site preference (enabled by default).

Progressive Rendering

Optimize the overall performance of your Aura-based site's pages by turning on Progressive Rendering. Progressive Rendering fetches, renders, and prioritizes page components, which can significantly improve the performance of component-heavy pages.

Page Optimizer

Page Optimizer reviews site performance and identifies opportunities to optimize performance. The Page Optimizer analyzes your Aura-based sites or apps and identifies performance optimization opportunities.

Performance and Scale Testing

Test site performance when implementing features, making changes, and during final review. If you have a large-scale site, use numerous customizations, or are unclear about your site's scale limits, testing is even more important. You can test your site using any of the available tools or open-source frameworks. Experience Cloud also has performance and scale testing capabilities. We encourage you to test, using commercial tools or open source. Or internal tools require Salesforce assistance and can't be used externally. Contact your Salesforce representative to determine whether your site is a good match for Salesforce performance testing tools.

Outages and Traffic Spikes Preparation

If your site becomes unavailable or overwhelmed by a spike in traffic, availability pages can communicate the issue to customers and allow business to continue. You can customize the Service Not Available page to provide the best possible experience for your customers when your site is down. The Too Many Requests page improves user experience when a site is overwhelmed with traffic and redirects users back to the site when it's available again.

Which Performance Tools Do I Need Based on My Experience Cloud Site?

With Experience Cloud, you can build a wide range of business-to-consumer (B2C) and business-to-business (B2B) applications that have different performance and scale considerations and optimizations. This section outlines common scenarios, likely performance issues, and the best tools to optimize performance.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

Sites with a High Volume of Unauthenticated (Guest) User Traffic

B2C sites have a high volume of guest user traffic, such as in help centers and community forums. Visitors are more likely to view content than create it. Such sites rapidly serve content to a large volume of users routinely and during traffic spikes. These tools help with high volume guest user traffic.

- Customer Community License
- Serve Your Experience Cloud Site with the Salesforce Content Delivery Network (CDN)
- Lightning Web Runtime (LWR) Application
- Progressive Rendering
- Page Optimizer
- Apex Caching on the Salesforce CDN

Sites with a High Volume of Authenticated (Logged-In) Traffic

Customer portals are an example of a B2C site that serves a high volume of authenticated (logged-in) traffic, such as registered customers or members. Users are more likely to view content than create it. Customer portals support high volume user logins and allow customers to self-register. We recommend these tools.

- Customer Community License
- Serve Your Experience Cloud Site with the Salesforce Content Delivery Network (CDN)
- Lightning Web Runtime (LWR) Application
- High-Volume Self-Registration Using Micro-Batching
- Progressive Rendering
- Page Optimizer
- Login & Identity features

- Apex Caching on the Salesforce CDN

Sites with High Transaction Loads and Business Flows

Sites with high transaction loads often include landing pages, business flows, and users who create CRM object records. Examples are marketing sites that collect leads, vaccine scheduling sites, and loan application sites. We recommend these tools for high volume transaction sites.

- Customer Community or Customer Community Plus License
- Serve Your Experience Cloud Site with the Salesforce Content Delivery Network (CDN)
- Account Role Optimization (ARO)
- High-Volume Self-Registration Using Micro-Batching
- High-Volume Record Creation Using Micro-Batching

Sites with a High Volume of Users and Roles

Large-scale B2B sites require high user volume, extensive use of roles, and high-level access to CRM objects and more advanced data sharing. Data sharing and access can influence performance and scale. Examples of large-scale portals are channel sales applications and partner sites. We recommend these tools for large-scale B2B sites.

- Customer Community Plus or Partner Community License
- Serve Your Experience Cloud Site with the Salesforce Content Delivery Network (CDN)
- Account Role Optimization (ARO)

Sites Combining Experience Cloud with Other Products

Commerce storefronts and Industry solutions are built by using Experience Cloud in combination with other Salesforce products. For example, an online storefront uses Commerce Cloud checkout, cart, product search services, and more. During large sales events, commerce sites typically handle higher than usual traffic volume, so it's important to know the limits of all the features enabled for the site.

Similarly, Experience Cloud implementations are often combined with managed packages from Salesforce ISV providers.

It's important to understand the performance and scale capabilities of both the additional Salesforce features you're enabling and the ISV capabilities you're using. Test your site for performance and scale during development and before launch to make sure the combination of Experience Cloud and additional features provides the performance required for your site.

High-Volume Self-Registration and Record Creation

High-volume sites often involve heavier than usual registration traffic and record creation. You can process more self-registrations and record creations per second when you process them in small batches, called micro-batches, instead of one at a time. After they're submitted, the requests are collected into batches, and the batches are processed asynchronously. Processing transactions using micro-batching improves performance and keeps your site moving during heavy traffic spikes.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions

Use Apex to Configure Self-Registration in Batches for High-Volume Sites

Your Experience Cloud site can handle twice as many self-registration requests at a time when they're collected into batches and processed asynchronously rather than one at a time. The accounts and contacts created are owned and managed by the community administrator. After a batch is processed successfully, users receive an email with their login instructions. Batch processing self-registration requests improves performance and keeps your site moving during heavy traffic spikes. Minimal coding is required when you use the Apex controller that manages your self-registration flow.

Use Apex to Configure Record Creation in Batches for High-Volume Sites

Experience Cloud site users can create more cases, leads, and custom objects per second when they're collected into batches and processed asynchronously rather than one at a time. Batch processing improves performance and keeps your site moving during heavy traffic spikes. You can invoke batch record creation using the Apex method added for this purpose.

Use Experience Builder to Configure Micro-Batching for High-Volume Sites

Use the Create Record Form, Contact Support Form, or Lead Form (LWC) components to create cases, leads, and custom objects more efficiently. When records are collected into batches and processed asynchronously, your site can process more records at a time. Batch processing improves performance and keeps your site moving during traffic spikes.

High-Volume Registrations and Record Creation Fixes

Request forms on standard components and pages automatically check for errors and prompt users to fix the errors before submitting. If you invoked micro-batching for record creation using the Apex method, resolve all form errors before submission. Errors not discovered before submissions are sent to the site admin via email. You can also access errors that occur during record processing using Connect API.

Use Apex to Configure Self-Registration in Batches for High-Volume Sites

Your Experience Cloud site can handle twice as many self-registration requests at a time when they're collected into batches and processed asynchronously rather than one at a time. The accounts and contacts created are owned and managed by the community administrator. After a batch is processed successfully, users receive an email with their login instructions. Batch processing self-registration requests improves performance and keeps your site moving during heavy traffic spikes. Minimal coding is required when you use the Apex controller that manages your self-registration flow.

External Identity and Customer Community license users or Customer Community Plus and Partner Community license users with account role optimization (ARO) enabled can use micro-batching for self-registration. Users can't be created for existing accounts using self-registration.

Keep the following in mind when using Apex controllers to manage your self-registration flow:

- For person account sites, leave the `account` and `contact` fields blank.
- For business account sites, you must add an account. Contacts are optional, but they require a null value.
- User sObjects are required for all sites.

1. From Setup, in the Quick Find box, enter *`Apex Classes`*, and then select **Apex Classes**.
2. Use this function for the Apex controller that manages your self-registration flow.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To configure record and case creation in batches:

- Use Micro-Batching to Create Records

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin or publisher in that site

To edit Apex classes:

- Author Apex
- AND
- Customize Application

```
String uuid = Network.createExternalUserAsync(user, contact, account);
```

Contact is a (not yet saved) sObject.

```
new Contact(
     FirstName = firstName,
     LastName = lastName,
     Level__c = 'Primary');
```

Account is an sObject.

```
new Account(
  name = 'Account for '+ LastName,
  description = 'account description',
  active__c = 'Yes' );
```

Use Apex to Configure Record Creation in Batches for High-Volume Sites

Experience Cloud site users can create more cases, leads, and custom objects per second when they're collected into batches and processed asynchronously rather than one at a time. Batch processing improves performance and keeps your site moving during heavy traffic spikes. You can invoke batch record creation using the Apex method added for this purpose.

The following applies to authenticated users who create records in batches using micro-batching:

- The **Use Micro-Batching to Create Records** profile permission is required.
- They own all records that they create via micro-batching.
- Field-level security and record type access are bypassed when creating the records. They apply after the record is created.
- Records created via micro-batching use the default record type for the org when created via micro-batching.
- When creating a child record, only Read access on the parent record is required.

The Apex Network.createRecordAsync method has three parameters:

- The first parameter `processType` must be set to 'GENERIC'.
- The second parameter `sObject` can't be empty or null. It must contain a valid value representing a supported object. Client-side validations are performed through the end-user experience before the submission of the record for creation using micro-batching.
- The third parameter is an array of file attachment links. The file attachments must be created ahead of time. This parameter is optional, and available to authenticated users only

Salesforce uses the Automated Process user to create records in batches on behalf of the original users. Site administrators with the **Set Audit Fields upon Record Creation**permission can set the Created By field of the record created to the original user. Otherwise, the Created By field is set to Automated Process user.

When guest users create records via micro-batching, the Created By field is set to Guest User, however, guest users don't own the created records.

1. From Setup, in the Quick Find box, enter *`Apex Classes`*, and then select **Apex Classes**.
2. Use this function for the Apex controller that manages the batch record creation of the object that you want to create.

   To create cases in batches:

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

To configure record and case creation in batches:
- Use Micro-Batching to Create Records

To set the Created By field of a record created to the original user:
- Set Audit Fields upon Record Creation

To publish an Experience Cloud site:
- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin or publisher in that site

To edit Apex classes:
- Author Apex
- AND
- Customize Application

```
Case mycase = new Case( Subject = 'sample case', Description = 'case description');
```

Example:

```
String uuid = Network.createRecordAsync('GENERIC', mycase, [enter ContentDocumentIDs
 separated by commas])
```

Note: The return value uuid represents the temporary id of the record submitted for batch processing. If record creation fails, uuid can be used to identify errors associated with the submission on page 531.

To verify that micro-batching is working as expected via Apex, test the createRecordAsync method in the Apex class by adding the test class definition. For example:

This is the apex class

```
public class  MicrobatchCreateRecord  {
      public string microbatchCreateCase(String subject) {
          Case c = new Case();
          c.subject = subject;
          String uuid = Network.createRecordAsync('GENERIC', c);
          return uuid;
      }
}
```

This is the apex test class:

```
@IsTest
public class MicrobatchCreateRecord_Test {
    @IsTest
    public static void testMicrobatchCreateCase() {
         string newCaseSubject = 'ApexTestCase1';
          MicrobatchCreateRecord controller = new MicrobatchCreateRecord();

          Test.startTest();

          string uuid = controller.microbatchCreateCase(newCaseSubject);
          Assert.isNotNull(uuid);

          Test.getEventBus().deliver();
          Test.stopTest();

          // Assert that the Case was created and has the expected subject
          List<Case> testCases = [Select Id, Subject from Case];
          Assert.areEqual(1, testCases.size());
          Assert.areEqual(newCaseSubject, testCases[0].subject);
    }
}
```

SEE ALSO:

Use Experience Builder to Configure Micro-Batching for High-Volume Sites

High-Volume Self-Registration and Record Creation

Use Experience Builder to Configure Micro-Batching for High-Volume Sites

Use the Create Record Form, Contact Support Form, or Lead Form (LWC) components to create cases, leads, and custom objects more efficiently. When records are collected into batches and processed asynchronously, your site can process more records at a time. Batch processing improves performance and keeps your site moving during traffic spikes.

To enable users to configure micro-batching, select the **Use Micro-Batching to Create Records** permission on the user's profile.

The following applies to authenticated users who create records in batches using micro-batching:

- They can click **Upload File** on a component to attach files to cases submitted in batches.
- They own all records that they create via micro-batching.
- Field-level security and record type access are bypassed when creating the records. They apply after the record is created.
- Records created via micro-batching use the default record type for the org when created via micro-batching.
- When creating a child record, only Read access on the parent record is required.

1. To configure record creation for micro-batching, click the **Create Record Form** component.
2. In the Site Performance section of the component settings, select **Create records in batches**.

   The Create Record Form can be used to create any object. Cases, leads, and custom objects can be created in batches. Other records are still created one at a time.

   The Contact Support Form component can be used to create cases in batches.
3. To configure the Contact Support Form for micro-batching, click the **Contact Support Form** component.
4. In the Site Performance section of the component settings, select **Create cases in batches**.
5. To apply your changes, publish your site.

   Note: The Leads Form (LWC) also uses micro-batching to create leads in batches rather than one at a time. The Lead Form LWC component is enabled for micro-batching by default and requires no further configuration. For more information, see the Lightning Web Component Developer Guide.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions

USER PERMISSIONS

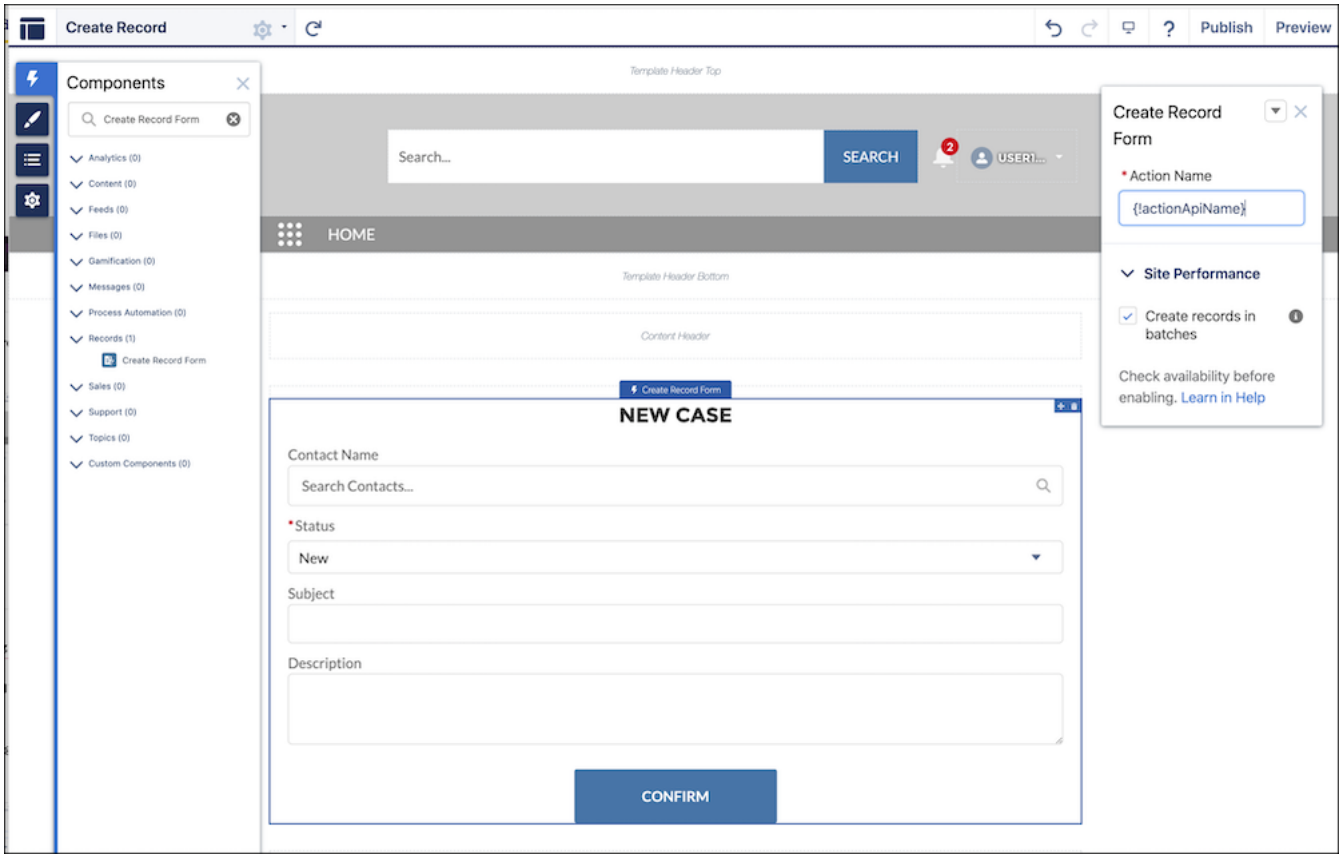
To configure record and case creation in batches:

- Use Micro-Batching to Create Records

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

Example:



SEE ALSO:

- Use Apex to Configure Record Creation in Batches for High-Volume Sites
- High-Volume Self-Registration and Record Creation
- Create Record Form
- Contact Support Form

High-Volume Registrations and Record Creation Fixes

Request forms on standard components and pages automatically check for errors and prompt users to fix the errors before submitting. If you invoked micro-batching for record creation using the Apex method, resolve all form errors before submission. Errors not discovered before submissions are sent to the site admin via email. You can also access errors that occur during record processing using Connect API.

If you're using micro-batching for self-registration, users receive an error email for any issues that occur while the request is processing that they can fix. To configure the self-registration user error email template, select **Administration** > **Emails** from your site's Workspaces.

You receive an error email containing information about which records failed to process and why they failed if the issue is something that you, and not the user, can fix.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions

By default, error emails go to the site admin. To change who receives the error email, update the Site.Admin field for the site.

You can also use Connect API calls to get more information about errors sent to you. This example ConnectAPI call gets information about a registration error.

```
GET /connect/communities/${communityId}/microbatching/errors". For example,
"/connect/communities/${communityId}/microbatching/errors?processType=SELF_REGISTRATION&earliestDate=2021-11-16T16:17:31.797Z
```

After fixing the source of the problem, you can reprocess the record. You can also download the data for records and discard errors.

For more information, see Connect REST API Introduction.

Progressive Rendering Overview

Progressive Rendering prioritizes the display order of your page components. With proper planning and testing, it can improve display time performance and polish your site's experience to better engage customers.

Progressive Rendering improves the performance of your page by fetching and rendering page components in a parallel and prioritized manner. If you notice that your site pages take a long time to load before you see the components rendered on the screen, then progressive rendering can help improve your site's performance.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Assign one of three priorities to any top-level component.

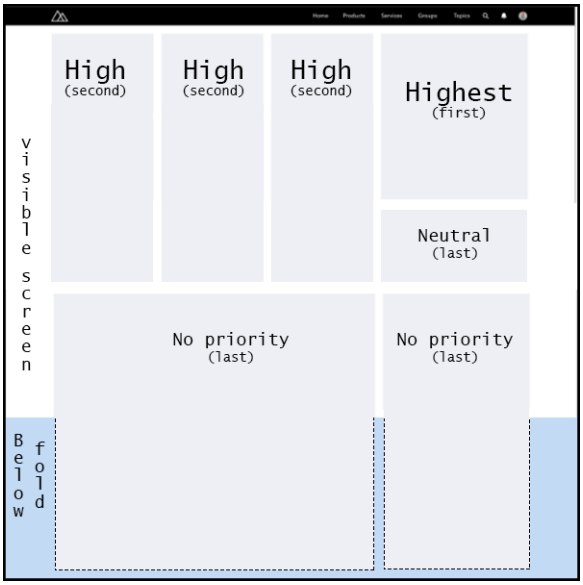
Table 2: Component Priority Levels

Priority	Description
Highest	Highest priority components are displayed first. This priority is recommended for key content that you want to display first or content that appears above the fold on longer pages.
High	High priority components are displayed after all components in the Highest group.
Neutral	Neutral priority components are displayed after all other components that have a higher priority. By default, all components begin with a Neutral priority.

Note: Only top-level components in the content area of your pages can have a priority. You can't assign a priority to a nested component.

As an example, assign **Highest** (first) to the few components that you want to be viewed first. Specify **High** (second) for those components that can load later without affecting your customer's experience. Unassigned components are treated as **Neutral** by default and are displayed last. There's no right choice for assignments, but a lack of planning can degrade performance and diminish positive experiences on your site.

For instance, sometimes you want a critical notice to appear first, prioritized as highest, and then fill in some of your highlighted content, prioritized as high. All other components, visible and below the fold, load after critical notices are rendered. Whether explicitly prioritized as neutral or not, they'retreated as neutral.



Note: All unassigned components are set to **Neutral** priority. For new sites, the default priorities for components can vary based on the site template.

Because Progressive Rendering requires careful planning and testing, it's off by default. Turn it on from the **Advanced** section of your Experience Builder Settings. Using this feature requires time and effort. But don't worry, we provide some ideas to help you get started in the Progressive Rendering Guidelines

So, what happens while Progressive Rendering is doing its thing? Your page layout is roughly rendered and then components are added in order of decreasing priority. Generally, this type of rendering doesn't cause any visual issues. However, sometimes components rearrange as the page displays, depending on which components you prioritized and how quickly it loads. That's another good reason to test, test, and retest when you decide to take advantage of this advanced feature.

Assign a priority to a component in the actions menu of the Property Editor.

Note: After you set the priorities, adding, deleting, or duplicating a component or changing themes or layouts doesn't change your priority settings, but it invalidates your assumptions and testing. To ensure that your choices remain effective, you can expect any changes made to kick off a new round of testing. We try to notify you when you make those kinds of changes, but you still have to do the testing. Always make testing a part of your change plan.

Turning off Progressive Rendering removes prioritized behavior, but your settings remain. If you turn on Progressive Rendering again later, the original priority settings go back into force. While the continuity makes testing easier, the results can surprise you if you don't watch for it.

Progressive Rendering Guidelines

Here are some guidelines for how to get the most out of Progressive Rendering.

Prioritize Component Display Order with Progressive Rendering

Quickly set the display order of components on your Experience Builder pages with Progressive Rendering. By carefully optimizing how your pages display, you can enhance the experience of your site and better engage your community.

SEE ALSO:

Salesforce Community Page Optimizer analyzer

Prioritize Component Display Order with Progressive Rendering

Assign an Audience to a Component

Progressive Rendering Guidelines

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Here are some guidelines for how to get the most out of Progressive Rendering.

When is the best time to Progressive Rendering?

Not all Experience Cloud sites require this powerful feature, so don't rush to use it. However, when you need it, you really need it.

Progressive Rendering is designed to help improve the performance of your page by fetching and rendering page components in a parallel and prioritized manner. If you notice that your site pages take a long time to load before you see the components rendered on the screen, then progressive rendering can help improve your experience.

Use the Page Optimizer tool to determine if Progressive Rendering is a good choice for your site pages and to get suggestions on how to prioritize your components. It can also help you evaluate the performance impact of your configurations.

Note: Page Optimizer is available as a Chrome extension. You can read more about the tool in its documentation.

Finding the right configuration that works best for you both in terms of performance and user experience can take a few iterations of configuration and testing.

Which components are good candidates for prioritization?

Generally, it's probably best to have a few small (but important) components in the **Highest** group. However, trial and error testing and in-depth performance analysis are the best routes to figuring out how to best optimize your pages.

What happens while Progressive Rendering is doing its thing?

Your page layout is roughly rendered and then components are added in order of decreasing priority. Generally, this type of rendering doesn't cause any visual issues. However, sometimes components rearrange as the page displays, depending on which components you prioritized and how quickly it loads. That's another good reason to test, test, and retest when you decide to take advantage of this advanced feature.

When is the best time to revisit your priority settings?

After priorities are set, adding, deleting, or duplicating a component or changing themes or layouts potentially invalidates your currently set priorities. Any changes require you to review the display order to ensure it's still effective.

Test, test, test

Always test your pages after you change your priority settings. We made it easy to test the page with and without Progressive Rendering enabled. If you turn off the feature, your component priority settings are remembered, and they're reapplied when you turn it back on.

SEE ALSO:

- Prioritize Component Display Order with Progressive Rendering
- Salesforce Community Page Optimizer analyzer

Prioritize Component Display Order with Progressive Rendering

Quickly set the display order of components on your Experience Builder pages with Progressive Rendering. By carefully optimizing how your pages display, you can enhance the experience of your site and better engage your community.

Before you activate this feature, read Component Prioritization Guidelines on page 534. Determine the need and value of using Progressive Rendering for your site.

Choose the components you want to load first and which can load later. Evaluating components is a combination of determining their computational load and their design and user impact. Good decisions require research, analysis, testing, and retesting. Consider working with other disciplines, such as usability experts, to ensure that you're evaluating all potential impacts.

EDITIONS

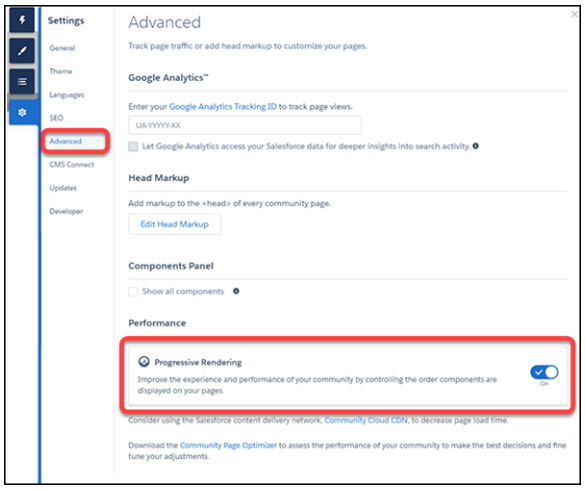
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

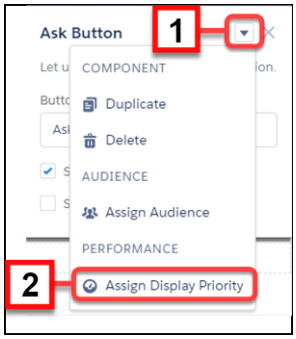
To enable Progressive Rendering and apply settings:

- Create and Set Up Communities

1. In the Experience Builder Advanced settings, enable Progressive Rendering.



2. Select a component on the page.
3. From the actions menu (1) in the Property Editor, select **Assign Display Priority** (2).



4. Choose the appropriate priority, and click **Assign**.

   There are three priority choices.

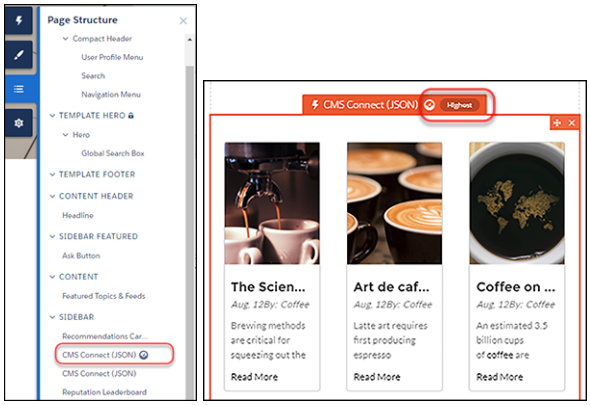
Table 3: Component Priority Levels

Priority	Description
Highest	Highest priority components are displayed first. This priority is recommended for key content that you want to display first or content that appears above the fold on longer pages.

Priority	Description
High	High priority components are displayed after all components in the Highest group.
Neutral	Neutral priority components are displayed after all other components that have a higher priority. By default, all components begin with a Neutral priority.

After you select a priority, a color border and icon around the component indicates the priority that is assigned. An icon also appears by the component in the Page Structure panel. In addition, a banner is added to the page to remind you that there are components with priorities set on the page.

To change the priority later, select **Edit Display Priority** in the component menu, or click either of the priority icons displayed in the page structure menu or the component border.



To remove the priority entirely, select **Unassign Display Priority** in the component menu.

5. Test your results, and ensure that the experience is what you expect.

If you add new components or change the priorities of existing components, re-examine the priority choices on your page to ensure that they're still appropriate and working as intended.

SEE ALSO:

Progressive Rendering Guidelines

Salesforce Community Page Optimizer analyzer

Analyze and Improve Experience Builder Site Performance

The Salesforce Page Optimizer analyzes your site and identifies issues that impact performance. Use the information to refine your design and improve site performance for your members. The Page Optimizer is a free plug-in available from the Chrome Web Store. Download and install the plug-in as you would any Chrome extension.

To download the Page Optimizer, in Experience Builder, click on the left sidebar, and then click **Advanced**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

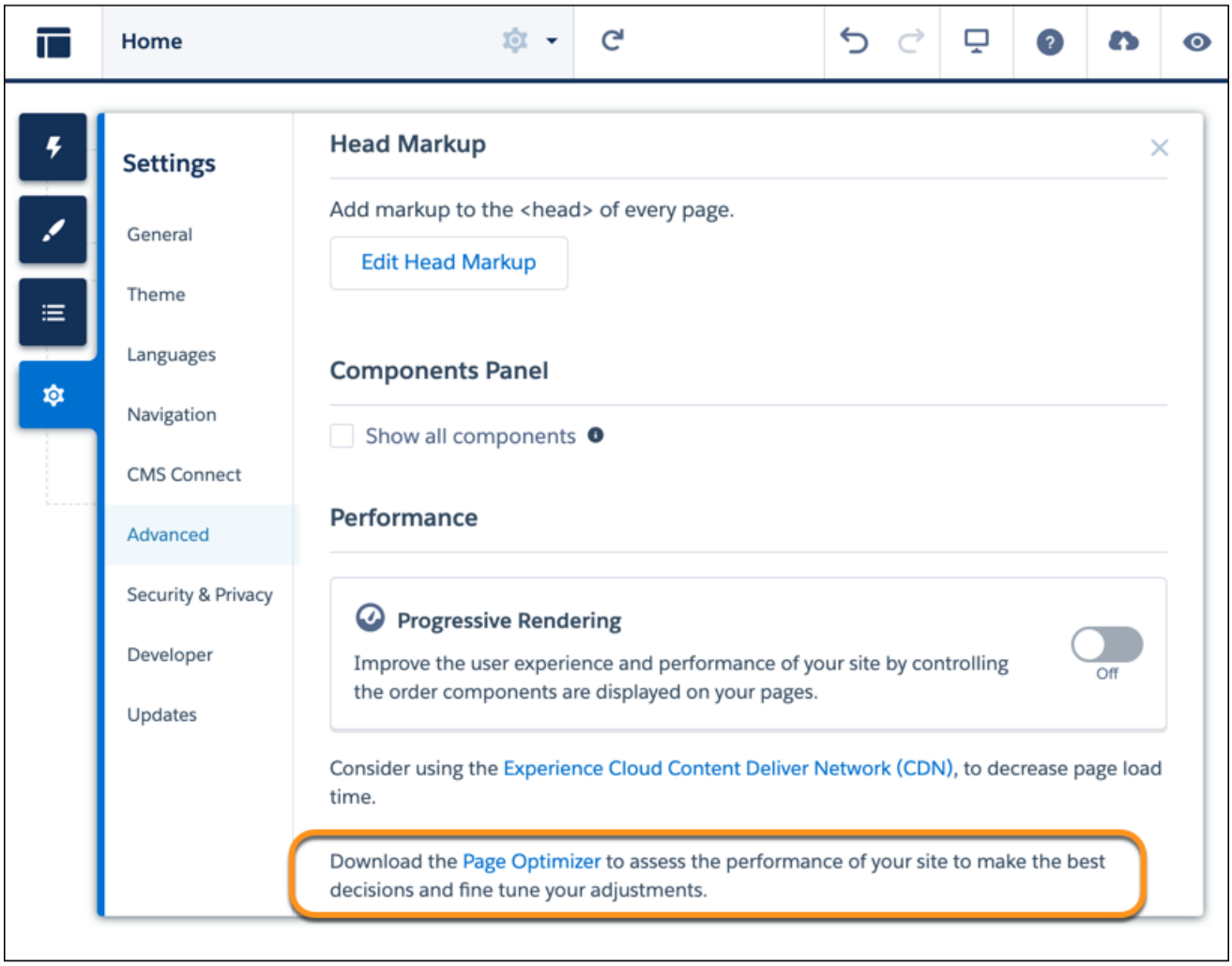
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

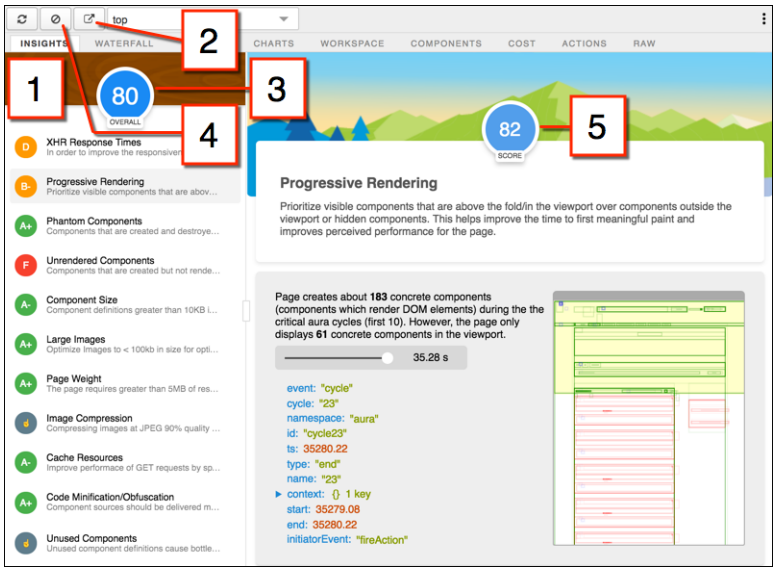
- Be a member of the site AND an experience admin or publisher in that site



After installation, the Page Optimizer is located with your other Chrome extensions.

Insights

To analyze your site, navigate to your published site, load the page, and then launch the Page Optimizer.



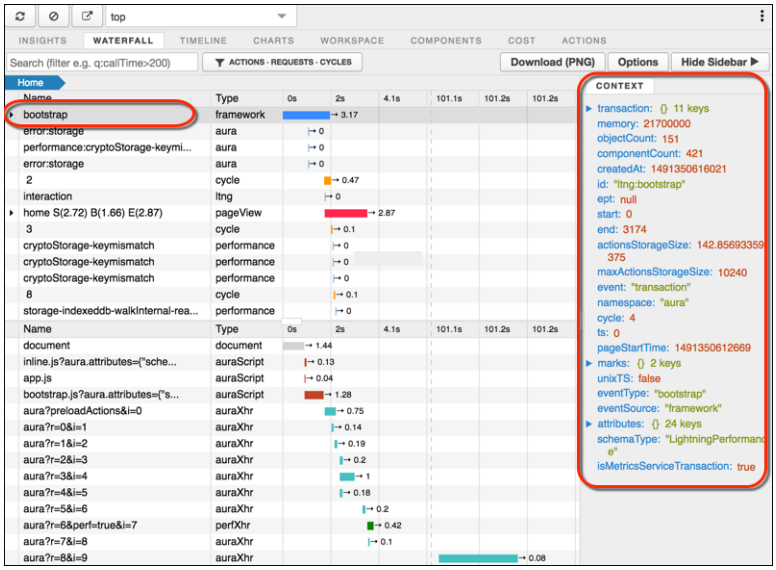
The Insights tab (1) evaluates your page based on best practices for web applications developed using the Lightning framework. This tab displays an overall performance score (3) along with individual scores (5) for various analysis rules. To view details and suggested actions, click each rule. For more room to work, click **Popout** (2).

The Insights tab is conservative in providing recommendations. For further insights, consider reviewing the raw data presented on the Waterfall, Timeline, Charts, Cost, and Actions tabs.

To remove collected metrics, click **Clear** (4). Perform some user actions on the page to collect new metrics, and then reopen the Page Optimizer. For example, to gather performance metrics for liking a feed item, clear performance metrics, click Like, and reopen the Page Optimizer.

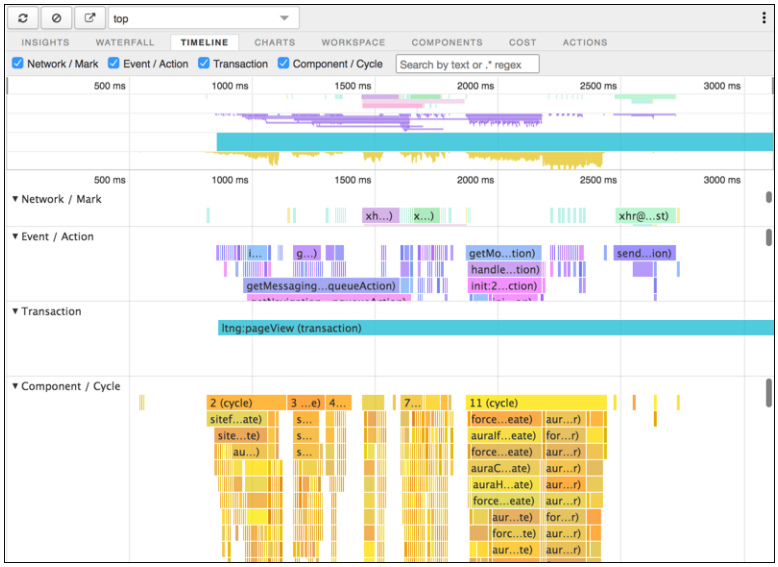
Waterfall

The Waterfall tab displays all network requests and performance instrumentation data. Click a row to view contextual information in the sidebar. Click the arrow to the left of each row to expand the information for each row.



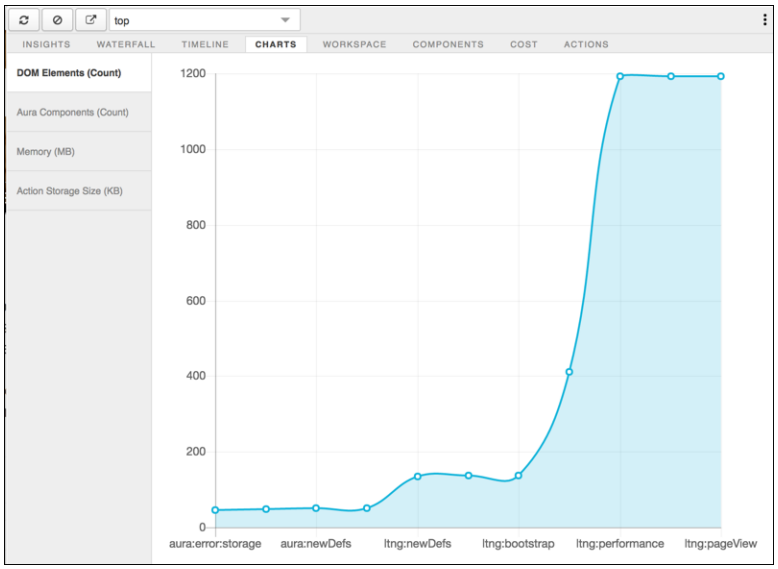
Timeline

The Timeline tab provides a profile of each component's rendering lifecycle. The timeline view is optimized for displaying Lightning framework metrics, so it's easier to interpret than Chrome DevTools.



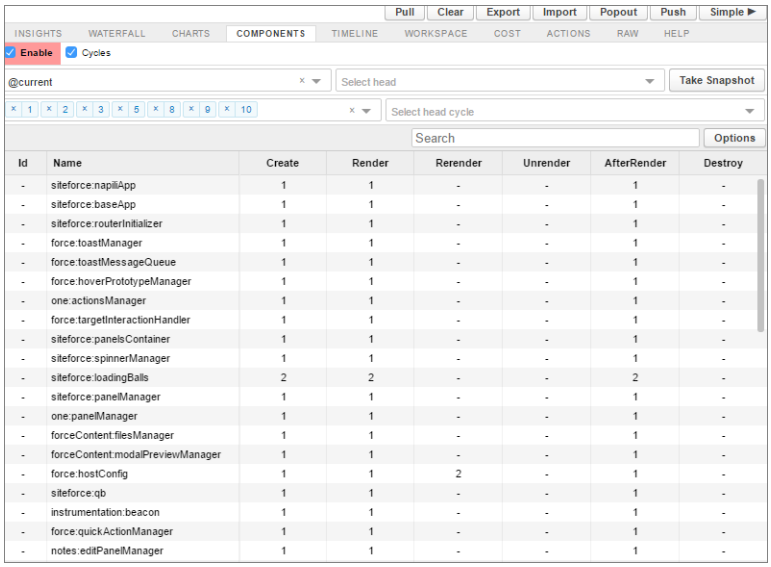
Charts

The Charts tab displays trending information about memory and components as customers use your page.



Components

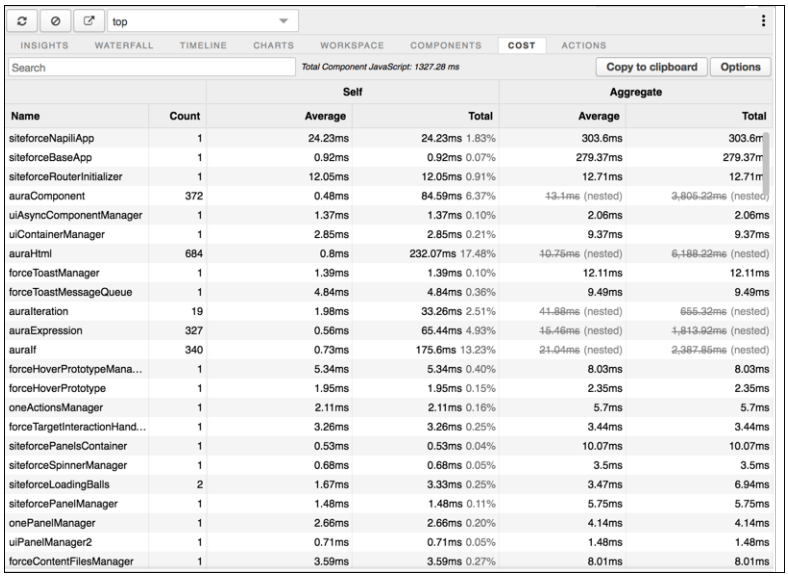
The Components tab displays the lifecycle counts for each component on the page. This view helps you identify potential component leaks and unexpected rendering behavior. Use the Component tab along with the Cost tab for an overall view of component performance.



Id	Name	Create	Render	Rerender	Unrender	AfterRender	Destroy
-	siteforce:napiliApp	1	1	-	-	1	-
-	siteforce:baseApp	1	1	-	-	1	-
-	siteforce:routerInitializer	1	1	-	-	1	-
-	force:toastManager	1	1	-	-	1	-
-	force:toastMessageQueue	1	1	-	-	1	-
-	force:hoverPrototypeManager	1	1	-	-	1	-
-	one:actionsManager	1	1	-	-	1	-
-	force:targetInteractionHandler	1	1	-	-	1	-
-	siteforce:panelsContainer	1	1	-	-	1	-
-	siteforce:spinnerManager	1	1	-	-	1	-
-	siteforce:loadingBalls	2	2	-	-	2	-
-	siteforce:panelManager	1	1	-	-	1	-
-	one:panelManager	1	1	-	-	1	-
-	forceContent:filesManager	1	1	-	-	1	-
-	forceContent:modalPreviewManager	1	1	-	-	1	-
-	force:hostConfig	1	1	2	-	1	-
-	siteforce:qb	1	1	-	-	1	-
-	instrumentation:beacon	1	1	-	-	1	-
-	force:quickActionManager	1	1	-	-	1	-
-	notes:editPanelManager	1	1	-	-	1	-

Cost

The Cost tab displays the amount of time each component was busy processing its logic. The lower the time, the better the performance.



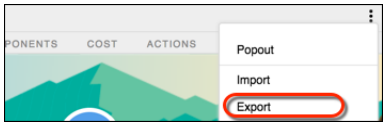
		Self		Aggregate	
Name	Count	Average	Total	Average	Total
siteforceNapiliApp	1	24.23ms	24.23ms 1.83%	303.6ms	303.6m
siteforceBaseApp	1	0.92ms	0.92ms 0.07%	279.37ms	279.37m
siteforceRouterInitializer	1	12.05ms	12.05ms 0.91%	12.71ms	12.71m
auraComponent	372	0.48ms	84.59ms 6.37%	~~13.1ms~~ (nested)	~~3,805.22ms~~ (nested)
uiAsyncComponentManager	1	1.37ms	1.37ms 0.10%	2.06ms	2.06ms
uiContainerManager	1	2.85ms	2.85ms 0.21%	9.37ms	9.37ms
auraHtml	684	0.8ms	232.07ms 17.48%	~~10.75ms~~ (nested)	~~6,188.22ms~~ (nested)
forceToastManager	1	1.39ms	1.39ms 0.10%	12.11ms	12.11ms
forceToastMessageQueue	1	4.84ms	4.84ms 0.36%	9.49ms	9.49ms
auraIteration	19	1.98ms	33.26ms 2.51%	~~41.88ms~~ (nested)	~~655.32ms~~ (nested)
auraExpression	327	0.56ms	65.44ms 4.93%	~~15.46ms~~ (nested)	~~1,813.92ms~~ (nested)
auraIf	340	0.73ms	175.6ms 13.23%	~~21.04ms~~ (nested)	~~2,387.85ms~~ (nested)
forceHoverPrototypeMana...	1	5.34ms	5.34ms 0.40%	8.03ms	8.03ms
forceHoverPrototype	1	1.95ms	1.95ms 0.15%	2.35ms	2.35ms
oneActionsManager	1	2.11ms	2.11ms 0.16%	5.7ms	5.7ms
forceTargetInteractionHand...	1	3.26ms	3.26ms 0.25%	3.44ms	3.44ms
siteforcePanelsContainer	1	0.53ms	0.53ms 0.04%	10.07ms	10.07ms
siteforceSpinnerManager	1	0.68ms	0.68ms 0.05%	3.5ms	3.5ms
siteforceLoadingBalls	2	1.67ms	3.33ms 0.25%	3.47ms	6.94ms
siteforcePanelManager	1	1.48ms	1.48ms 0.11%	5.75ms	5.75ms
onePanelManager	1	2.66ms	2.66ms 0.20%	4.14ms	4.14ms
uiPanelManager2	1	0.71ms	0.71ms 0.05%	1.48ms	1.48ms
forceContentFilesManager	1	3.59ms	3.59ms 0.27%	8.01ms	8.01ms

Actions

The Actions tab displays a list of all actions performed on the page along with their timing information.

Export

Export your analysis to a file to share with your development and support teams.



Submit Feedback

We want to hear from you. Share your comments, questions, requests, and any issues that you find. Submit Feedback.

Improve Experience Cloud Site Performance with Browser Caching

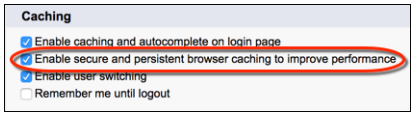
If you use many components in your Experience Builder site, you can improve your site's performance with browser caching. Performance is about the same for the first page load, but subsequent page loads are faster. The cache is encrypted and secure.

The **Enable secure and persistent browser caching to improve performance** setting enables browser caching of your site's Lightning components. It's enabled by default.

Note: To cache your site's Visualforce pages on your end users' web browsers, disable the site-level setting: **Cache public Visualforce pages**. For more information on caching your site's Visualforce pages, see *Configure Site Caching* in Salesforce Help.

To verify that the **Enable secure and persistent browser caching to improve performance** setting is enabled:

1. From Setup, in the Quick Find box, enter `Session Settings`, and then select **Session Settings**.



SEE ALSO:

Configure Site Caching

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

SEO for Experience Builder Sites

Search engine optimization (SEO) ensures that your public Experience Builder site is visible to search engines. SEO helps customers, partners, and visitors find your content via online search.

Before you begin setting up SEO for your Experience Builder site, it helps to familiarize yourself with these concepts.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites on page 8

Publicly Available Sites

SEO is supported on production orgs for Experience Builder sites that are public or that have some public pages. SEO isn't supported on Developer Edition, sandbox, or trial orgs.

After you make your site public, search engines can index the public pages of your site. Additionally, the SEO settings tab in Experience Builder becomes available, where you can view the number of indexed records, manually generate the sitemap, and refresh content snapshots.

Location of Your Experience Builder Site

For search engines, such as Google™ or Bing®, your site must be at the root level. To determine the location of your site, from Setup, in the Quick Find box, enter `Digital Experiences`, and then click **All Sites**. Then, check the address in the URL column.

The address for a root-level site has the format `https://site_URL`. A site that isn't at the root level commonly has a URL with a path prefix in the format `https://site_URL/sub_path/`.

If your site has a URL prefix, meaning it's not at the root level, you must create a root site. You submit the sitemap for the root-level site to search engines first, and then submit the URLs for the site with a path prefix.

The `robots.txt` File

The industry standard `robots.txt` file informs search engine spiders and bots which areas of your site you want them to access. The `robots.txt` file for your site is automatically generated and allows search engines to crawl your entire site. The `robots.txt` file is at the root level of your site and is unique for each domain. Therefore, sites that share a domain also share a `robots.txt` file. Conversely, sites available on multiple domains, meaning *.force.com, *.my.site.com, and custom domains, have different default `robots.txt` files.

To view the `robots.txt` file, navigate to `https://<community_URL>/robots.txt`. The `robots.txt` file uses include (Allow) and exclude (Disallow) directives to inform spiders and bots about which areas of your site to crawl. Only relative URLs are valid for the Allow and Disallow directives.

The Sitemap

The `sitemap.xml` file for your site contains a list of the public pages and the objects and fields with read access in the guest user profile. Search engines use the sitemap as a starting point to discover which information from your site is available for crawling and important content to index. The sitemap is at the root level of your site. To view the `sitemap.xml` file, navigate to `https://<site_URL>/s/sitemap.xml` for Aura sites or `https://<site_URL>/sitemap.xml` for LWR sites.

To ensure that your Knowledge articles are included in the sitemap, assign at least one navigational, featured, or content topic to each article. If your org supports multilingual Knowledge articles, the sitemap includes an entry for each supported language, based on Google's recommended format.

The sitemap is automatically generated one time a week. It's generated the first time on the following Sunday, and then regenerated every Sunday thereafter. Additionally, an automatic partial sitemap refresh occurs every 24 hours. The `sitemap.xml` file is available only in production orgs.

Note: The automatic sitemap generation and partial sitemap refresh processes start between 12:00 AM and 3:00 AM GMT and can take up to a few hours to complete in some cases. If this timing interrupts your work during business hours, contact Salesforce Customer Support to disable the automatic sitemap generation and refresh processes, and generate sitemap refreshes manually instead.

If your org deactivates the account of the user who most recently published a site, the sitemap is no longer refreshed automatically. To resume automatic sitemap refreshes, reassign the scheduled jobs that generate an automatic sitemap refresh to an active or automated user.

For best performance, if you generate a manual sitemap, do so during off-peak hours.

Page Indexing

When you make your site public, search engines can then index all the pages of your site. However, if you don't want search engines to index certain pages, you can:

- Make a page private. Use this method to make the page unavailable to both guest users and search engines.
- Use the `noindex` meta tag. This tag prevents search engines from showing the page in search results, but allows guest users to view the page.
- Create a custom `robots.txt` file. The `robots.txt` file is a rules-based approach to control search engine crawler access to specific areas of your site. Guest users can still view pages that you don't want search engines to crawl.

By default, objects displayed on a page are private and can't be indexed until you explicitly make an object and its associated fields available to search engines.

If you plan to use a custom domain, keep your site private until you add and configure the custom domain. This way, search engines don't index your site's pages with the Salesforce-managed domain URLs.

After a search engine indexes a site page, you can't remove the public page from search results through Experience Builder. To remove a site page from an existing index, either make the page private or use the search engine's tools. For example, see Remove Web Results from Google Search in Google Search Help.

Set Up Your Experience Builder Site for SEO

Setting up SEO for your Experience Builder site includes a series of tasks that you perform in Salesforce and in the site. From identifying your preferred domain to determining which objects to make public, we've got you covered.

Identify Your Preferred Domain to Improve SEO Results

By default, your site is available on the *.my.site.com or *.force.com domain, but you can add a custom domain so that your site URLs reflect your company brand. However, multiple domains for the same site, meaning *.my.site.com, *.force.com, and custom domains, can dilute search engine results and lower page ranking. If you have multiple domains, identify which domain to use for crawling and indexing your site's pages.

SEO Page Properties in Experience Builder

Set the title, description, and head properties for your Experience Builder site pages to improve search results.

Create a Custom robots.txt File for Your Experience Builder Site

The `robots.txt` file for your site is automatically generated. It allows search engines to crawl your entire site. However, if you want to tell search engines not to crawl certain pages of your public site, you can create a custom robots.txt file.

SEO-Friendly URLs for Custom Objects in Lightning Web Runtime (LWR) Sites (Beta)

Boost organic traffic to your site by improving search engine optimization (SEO) with new URL configuration solutions. SEO-friendly URL snippets, or slugs, are available for custom objects in your enhanced LWR site. They're also available for product and category pages in your LWR Commerce sites. A slug improves SEO by replacing the record ID in the URL with relevant and human-readable information, ensuring that your site's pages are optimally surfaced in search engines.

Make Objects Available for SEO

When you make your site public, search engines can index the pages of your Experience Builder site. However, to ensure that you don't expose sensitive data, the data displayed by objects on those pages aren't public. Instead, you must specifically make those objects and their associated fields publicly available for indexing by search engines.

Provide Search Engines with Fresh Content Snapshots

Experience Builder sites in your production org use the Content Snapshot service to generate SEO optimized HTML for web crawlers such as Googlebot, and content sharing platforms such as Facebook. The concept is common to single-page application frameworks known as dynamic rendering. Salesforce takes a snapshot when you make changes to your site's publicly available content. This functionality works well for most updates. But let's say you update a page with time-sensitive information, such as price changes for a flash sale. Instead of waiting, you can take a manual snapshot once every 24 hours to refresh the page content served to search engines.

Generate a Manual Sitemap Refresh for Your Experience Builder Site

When you go live with a new Experience Builder site or make significant updates to an existing one, you can generate a manual sitemap one time every 24 hours outside of the weekly automatic sitemap refresh.

Reassign the Scheduled Jobs that Generate an Automatic Sitemap Refresh

To generate an automatic sitemap refresh, Salesforce uses an automated process called scheduled jobs. An automatic sitemap refresh requires two scheduled jobs that are associated with the account of the user who most recently published that site. If that user's account is deactivated, the scheduled jobs can't run, and your sitemap no longer refreshes automatically. To resume automatic sitemap refreshes, reassign the scheduled jobs that refresh the sitemap to an active or automated user account.

Best Practices and Tips for Using SEO in Experience Builder Sites

Follow these guidelines and best practices when optimizing SEO in your site.

SEO for Experience Builder Sites FAQ

Answers to common questions about using SEO in your Experience Builder site.

SEE ALSO:

Blog Post: Experience Cloud Content Snapshots and SEO Best Practices

SEO Best Practices and Considerations for Guest Users

Blog Post: Advanced SEO for Lightning Communities

Federated Search in Experience Cloud Sites

Enable Salesforce Knowledge in Your Experience Cloud Site

Salesforce Security Guide: Field Permissions

LWR Sites for Experience Cloud: Create a Multilingual Site

Set Up Your Experience Builder Site for SEO

Setting up SEO for your Experience Builder site includes a series of tasks that you perform in Salesforce and in the site. From identifying your preferred domain to determining which objects to make public, we've got you covered.

Here's an overview of the main steps to set up SEO for your site on a production org.

1. If you have multiple domains, identify your preferred domain.

   For an enhanced LWR site or for an Aura or LWR site without an identified preferred domain, the site's first custom domain alphabetically is the preferred domain.

   Tip: Identify your preferred domain before you make your site public. If the site is made public without a preferred domain, the *.force.com or *.my.site.com URLs are also indexed, and removing them from search results can take time.

2. Make your site public.

   The SEO settings tab in Experience Builder is available only if your site is public.

   When you make your site or specific pages public, search engines can then index those public pages. However, if you don't want unauthenticated visitors or search engines accessing certain pages, you can make those pages private. Also, more granular indexing control is available at the object and field levels.

3. To improve search results, specify the SEO properties for individual pages.

   These SEO properties are for the title and description that appear in the search results of indexed pages, and to prevent a page from being indexed.

4. Optionally, for a rules-based approach, create a custom robots.txt file to control the indexing of specific areas of your site.

5. If you want the information stored in objects accessible to search engines, make objects and their associated fields readable.

6. Activate your site to successfully implement SEO.

   Before activating your site, check the guest user profile to ensure that the correct objects have read access. This best practice controls the scope of your sitemap.xml file and keeps your site secure.

7. To make your changes live, publish your site.

8. If you're setting up SEO for the first time, or as needed, generate a manual sitemap refresh.

   The sitemap is automatically regenerated every Sunday. An automatic partial sitemap refresh that picks up incremental changes occurs every 24 hours. You can also generate a manual sitemap refresh one time every 24 hours if needed.

9. If necessary, provide search engines with fresh content snapshots.

   Salesforce takes a snapshot when you make changes to your site's publicly available content. This functionality works well for most updates. But if you update a page with time-sensitive content and don't see your changes in search results right away, you can take a manual snapshot one time every 24 hours. When you take a manual snapshot, you refresh the page content served to search engines.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites on page 8

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Identify Your Preferred Domain to Improve SEO Results

By default, your site is available on the *.my.site.com or *.force.com domain, but you can add a custom domain so that your site URLs reflect your company brand. However, multiple domains for the same site, meaning *.my.site.com, *.force.com, and custom domains, can dilute search engine results and lower page ranking. If you have multiple domains, identify which domain to use for crawling and indexing your site's pages.

The Preferred Domain setting appears in Experience Builder only if you have multiple domains associated with your Aura or LWR site. For an enhanced LWR site, or for an Aura or LWR site with multiple domains where you haven't identified a preferred domain, the site's first custom domain alphabetically is the preferred domain.

1. In Experience Builder, go to **Settings** > **General**.
2. Select your preferred domain.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites on page 8

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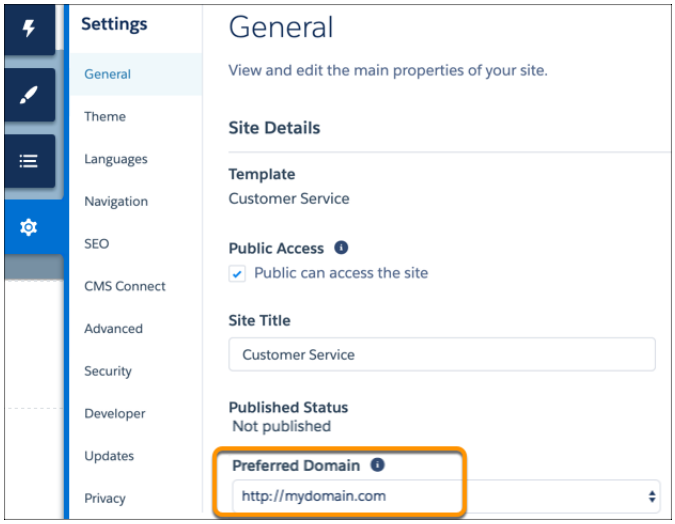
To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



Note:

- Make sure that you configure your preferred domain before submitting the sitemap to a search engine. After your site is public, the search engine shows all the custom URLs that you added to the sitemap.
- You can set only HTTPS preferred domains.
- Issues can occur if you configure preferred domains for two LWR or Aura sites that use the same custom domain with different path prefixes. For example, let's say you have two sites, `https://example.com/site1` and `https://example.com/site2`. If you configure preferred domains for both sites, then site2 uses the preferred domain for site1. To avoid problems in this scenario, set the Preferred Domain field to None for both sites.

SEE ALSO:

Configure a Custom Domain for Your Experience Cloud Site

Custom Domains

Generate a Manual Sitemap Refresh for Your Experience Builder Site

SEO Page Properties in Experience Builder

Set the title, description, and head properties for your Experience Builder site pages to improve search results.

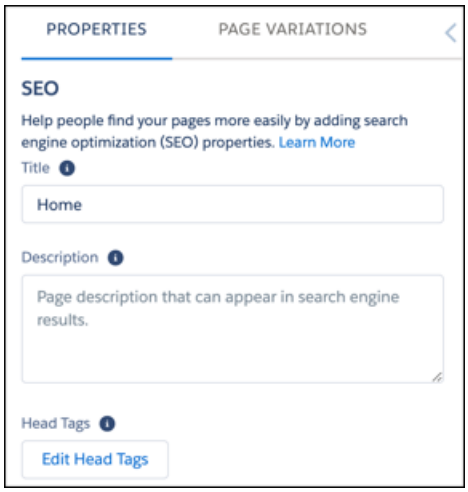
To view a page's properties, in Experience Builder, open the Pages menu and click ••• > **Page Settings**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites on page 8



Title

The title of the page. Shown in search engine results, the browser's tab or window title, and bookmarks.

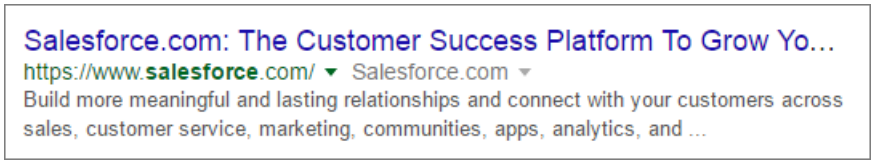
For data-based pages such as record and content pages, the title is set dynamically.

Description

The description of the page. Shown in search engine results to help users decide if it's the page that they're searching for.

For data-based pages such as record and content pages, the description is set dynamically.

If a page's `description` value is empty, search engines populate the description from the first text they find.



Head Tags

Edit Head Tags lets you enter specific `head` tags for the page to assist search engine optimization.

For data-based pages, such as record and content pages, you can enter expressions to access values from the record associated with the page. Associated values can include things like name, title, and value of specific fields.

To prevent search engines from indexing a page, add the `noindex` tag.

```
<meta name="robots" content="noindex">
```

You can specify local `head` tags for individual site pages, for example to indicate a non-canonical page. And you can augment any global tags that are in your `head` markup.

Tip: Alternatively, you can take a rules-based approach to controlling the visibility of specific areas of your site to search engines by creating a custom `robots.txt` file.

For security purposes, we restrict the tags, attributes, and values allowed in the `head` tags on your pages.

Allowed Tags	Allowed Attributes
<link>	as, charset, crossorigin, disabled, href, hreflang, id, import, integrity, media, rel,[1] relList, rev, sheet, sizes, target, title, type [1] For rel, allowed values are alternate, apple-touch-icon, apple-touch-icon-precomposed, apple-touch-startup-image, author, bookmark, canonical, external, help, icon, license, manifest, mask-icon, next, nofollow, noopener, noreferrer, pingback, prefetch, preload, prev, search, shortcut icon, stylesheet, and tag.
<meta>	charset, content, http-equiv,[2] name, property, scheme [2] For http-equiv, allowed values are cleartype, content-type, content-language, and default-style. Note: The attribute `http-equiv="X-UA-Compatible"` is only supported in combination with `content="IE=Edge"`.
<script>	type[3] [3] For type, allowed value is application/ld+json.

Dynamic SEO Page Properties

Record and CMS Content pages can contain dynamic data, such as from a database or ever-changing inventory. To make these pages discoverable, provide the title and identify which object it comes from. Use expressions to dynamically update the page title, description, and meta tags based on the changing content. The expressions differ depending on the page type. For Record pages, the Expression Language (EL) starts with {!Record.}. For Content pages, the EL starts with {!Content}. Null field values are returned as empty strings. Output appears in the appropriate language, if available.

Some object pages with dynamic data don't affect SEO and aren't indexed, such as Messages. So those page properties don't include fields for title or description.

Most standard fields are accessible to a guest user by default. To ensure access, confirm that Public Access is enabled in the Experience Builder settings so that the Guest User profile has access to the fields displayed. Custom fields are enabled for the Guest User profile through field-level security (FLS) settings before they can be used in expressions. If any queried field is restricted by profile or FLS, the entire record doesn't load and your expressions don't render on the page.

You can use these expressions only in the SEO section of the Experience Builder Pages Properties tab.

Note: Notice that the Object and Title expressions look a little different than usual? Use them as they appear, they work fine. They're unique for this area of Salesforce.

To implement dynamic properties for the `PageType` `Record`:

Expression	Description
{!Record._Object}	Returns the display name of the object.
{!Record._Title}	Returns the title of the record as defined in the name field. Keep in mind that the name field can have a different label than Name.

Expression	Description
{!Record.*FieldName*}	The value of the specified field for the record. The field name is case-sensitive and includes `__c` for custom fields. For example, show a record's type and title in search results using `{!Record.recordTypeLabel}.{!Record.title}`.

For example, you can display the object name of a record followed by its title: `{!Record._Object}: {!Record.title}`. Or add a specific field, such as `{!Record.Description}`.

For the CMS `Content*PageType*`, implement dynamic properties using these expressions:

Expression	Description
{!Content.contentTypeLabel}	Returns the display name of the object.
{!Content.title}	Returns the title of the content as defined in the name field. Keep in mind that the name field can have a different label than Name.
{!Content.*FieldName*}	The value of the specified field for the content. The field name is case-sensitive and includes `__c` for custom fields. For example, for a blog post, use {!Content.Body.Title}.

For example, `{!Content.title}.{!Content.lastModified}` displays the Content page's title and last modified date.

Canonical URL Tags

Choose a canonical URL to consolidate a single page that uses multiple URLs or different pages with similar content. Improve SEO and direct search bots to the most representative page from a set of duplicate pages on your site. Without canonicalization, search engines consider all of your identical or similar URLs as unique pages, which can cause several SEO issues.

- Search engines can miss your unique content.
- Too much duplicate content can dilute content ranking.
- Ranked content doesn't reflect the best URL.

To set up a canonical URL for a standard page, open the Experience Builder Page Properties tab. Select the SEO tab, then **Edit Head Tags**. Enter the properties as shown with your canonical URL.

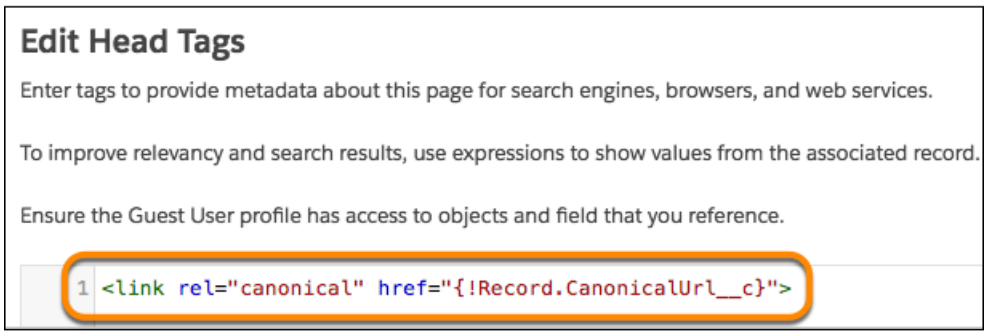
```
<link rel="canonical" href="https://mysite.com/s/canonicalURL">
```

For Record pages with dynamic data, we recommend that you create a custom field for the object to store the canonical URL. For more information on dynamic pages, see Dynamic SEO Page Properties on page 551.

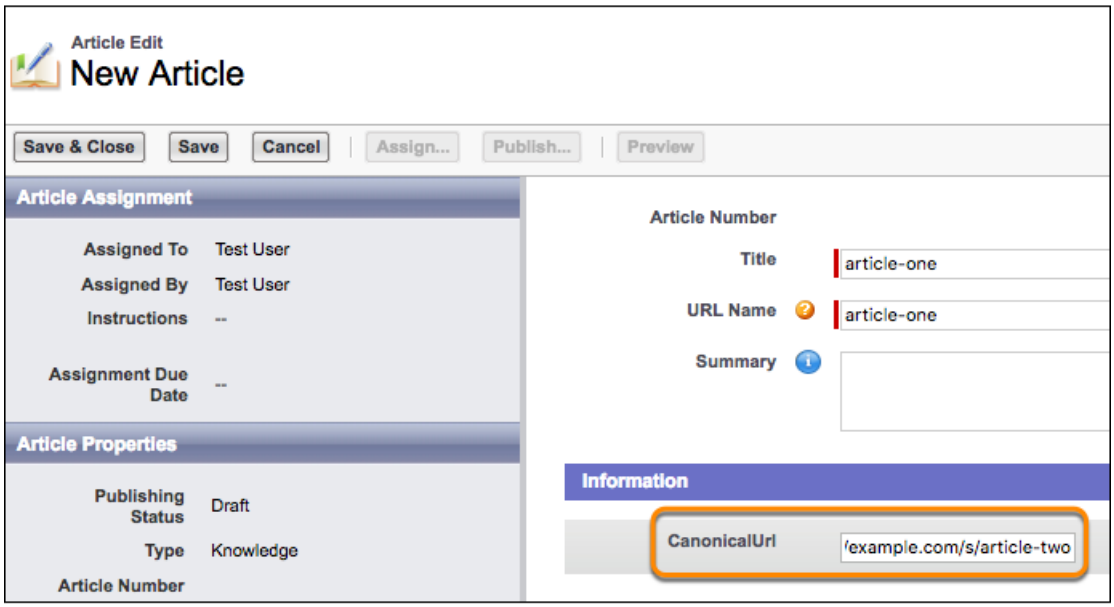
1. To create a custom field, select **Setup** > **Object Manager** > **Fields & Relationships**. In the New Custom Field page, select URL. In the Field Label and Field Name fields, enter `CanonicalURL`.
2. Most standard fields are accessible to a guest user by default. To ensure access, confirm that Public Access and field-level security (FLS) are enabled so that the Guest User profile has access to the fields displayed. For more information, see Make Objects Available for SEO on page 558.

3. Open the Experience Builder Page Properties tab. Select the SEO tab, then **Edit Head Tags**. To set the canonical URL, use the expression for new field you created.

```
<link rel="canonical" href="{!Record.CanonicalURL__c}">
```



4. In the Record properties, enter the URL in the custom CanonicalURL field.



Note: Question and Topic objects don't currently support Canonical URLs.

Structured Data

To improve your site's visibility in search results and to increase site traffic, add structured data to page head tags. Structured data provides key page details in a standardized format that helps search engines understand the content and meaning of a web page. Search engines use structured data to display your site pages in enhanced and engaging ways in search results. For example, search results for a recipe can include a hand-selected image of the finished dish with cook time, recipe ratings, and other details. You can use structured data to define thumbnail images, carousels, knowledge boxes, and more.

To add structured data to one of your pages, add the `<script>` tag with the `application/ld+json` type attribute to the Edit Head Tags section, and then provide the page details that you want to highlight. You can find structured data examples in Google's structured data search gallery.

Note: Experience Cloud sites allow only JSON-LD formatting for structured data. You can't use the `<script>` tag to add JavaScript to a page's head tags.

Here's an example of structured data for a recipe on a Content page.

```
<script type="application/ld+json">
{
    "@context": "https://example.com/",
    "@type": "Recipe",
    "name": "{!Content.title}",
    "author": {
        "@type": "Person",
        "name": "Granny Smith"
    },
    "datePublished": "2022-05-28",
    "description": "My family has loved this apple pie recipe for generations.",
    "prepTime": "PT60M"
}
</script>
```

To include dynamic page information in your structured data, use expressions. Be sure to start expressions for Record pages with {!Record} and expressions for Content pages with {!Content}.

SEE ALSO:

- Page Properties and Types in Experience Builder
- Add Markup to the Page <head> to Customize Your Experience Builder Site
- Control Public Access to Your Experience Builder Sites
- *Salesforce CMS:* Create a Detail Page

Create a Custom `robots.txt` File for Your Experience Builder Site

The `robots.txt` file for your site is automatically generated. It allows search engines to crawl your entire site. However, if you want to tell search engines not to crawl certain pages of your public site, you can create a custom robots.txt file.

Use a Visualforce page to create a custom `robots.txt` file. Then add the URLs of the pages that you want search engines to crawl to the Allow section, and add the URLs that you don't want search engines to crawl to the Disallow section. A common way to use a custom `robots.txt` file is to disallow your entire site and then selectively allow search engines to crawl individual pages.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites on page 8

USER PERMISSIONS

To create a Visualforce page and robots.txt file for your site:

- Create and Set Up Experiences

```
Disallow: /   # hides everything from ALL bots
Allow: /<path-prefix-1>/s  # add path you want to open to bots
Allow: /<path-prefix-2>/s  # add path you want to open to bots
Sitemap: http://<site_URL>/s/sitemap.xml
```

Pages whose URLs you add to the Disallow section can still appear in search results. For example, if an allowed web page points to a disallowed URL, a search engine can index the URL when it's crawling the allowed web page. Learn more in Google's Search Central Documentation. To hide or block a public site page from search results use the `noindex` meta tag.

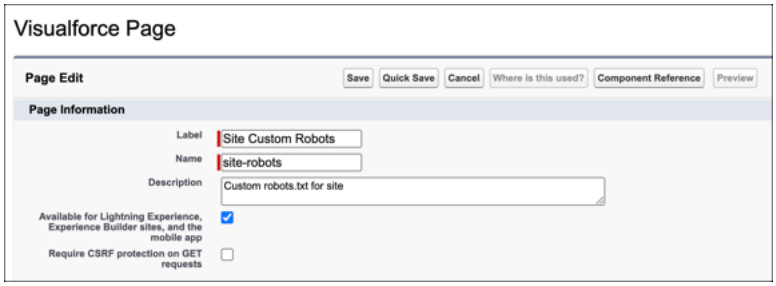
Tip: If you have more than one site, each with a different custom domain subpath, they share a `robots.txt` file. Therefore, when you create a custom `robots.txt` file, ensure that your search engine crawling directives account for all pages in all of your sites.

1. In a text file, create a list of include (Allow) and exclude (Disallow) directives for the areas of your site that you want to expose to or hide from search engines. Also include the path to all sitemaps for the domain—for example, `https://<site_URL>/s/sitemap.xml`.

   Only relative URLs are valid for Allow and Disallow directives.

2. To create a Visualforce page, from Setup, in the Quick Find box, enter *`Visualforce Pages`*. Then select **Visualforce Pages**, and click **New**.

3. Give the custom file a name. You can even call it `robots`.



4. Select **Available for Lightning Experience...**.
5. Copy your list of indexing directives and the sitemap path from the text file to the Visualforce page. For example:

```
<apex:page contentType="text/plain">
    User-agent: *
    Disallow: /
    Allow: /s
    Allow: /mycommunity/s
    Sitemap: https://example.com/s/sitemap.xml
    Sitemap: https://example.com/mycommunity/s/sitemap.xml
</apex:page>
```

6. Save your work.

   The Visualforce page is automatically saved at the root-level of the preferred domain.
7. From Experience Workspaces, click **Administration** > **Pages**, and then click **Go to Force.com**. Then, on the Site Details page, click **Edit**.
8. In the Site Robots.txt field, enter the name of the Visualforce page that you created, or click to search for the file.
9. Save your work.

SEE ALSO:

Best Practices and Tips for Using SEO in Experience Builder Sites

SEO for Experience Builder Sites FAQ

SEO-Friendly URLs for Custom Objects in Lightning Web Runtime (LWR) Sites (Beta)

Boost organic traffic to your site by improving search engine optimization (SEO) with new URL configuration solutions. SEO-friendly URL snippets, or slugs, are available for custom objects in your enhanced LWR site. They're also available for product and category pages in your LWR Commerce sites. A slug improves SEO by replacing the record ID in the URL with relevant and human-readable information, ensuring that your site's pages are optimally surfaced in search engines.

When adding a URL slug for your custom object, keep these considerations in mind.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

- To use URL slugs on localized versions of your site, enable translation workbench and add active languages for translation. For more information, see Translation Workbench.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

- URL slugs have a character limit of 150 and allow these characters: `a-z A-Z 0-9 . - _ $ & : ; * , = @`. Foreign language characters are also allowed.
- When choosing a language for a URL slug, select a language that's active in your org and site. For more information, see Supported Languages.
- Create a URL slug in your site's default language and translate it for each language you support. For example, if your site is configured to have both English and French URL slugs, then `site.com/fr/custom-object/{slug-english}` redirects to `site.com/fr/custom-object/{slug-french}`.
- When a customer is browsing in a language without a URL slug translation, but the page has a URL slug for your site's default language, the slug falls back to the default. For example, if your default site language is English and a customer is browsing in French, `site.com/fr/custom-object/{slug-english}` loads the page.
- When URL slugs are enabled and configured for custom object pages, they're used as the canonical URL in sitemaps created for LWR sites. Otherwise, the sitemap continues using the record ID URL.
- SEO-friendly URLs don't support site object pages created with custom metadata. URLs for pages made with custom metadata always use the record ID URL.

Enable SEO-Friendly URLs in LWR Sites (Beta)

Before you use SEO-friendly URLs, enable the functionality in your enhanced LWR site. The setting is site-specific, which means you must enable it on a site-by-site basis.

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Select **Use SEO-friendly URLs on this site**. You can't disable this setting after enabling it.
4. Save your work.
5. Repeat this process for each site that uses SEO-friendly URLs.
6. Publish your site to apply changes.

After you enable the setting, you can see and edit the base friendly URL in the site's **Experience Builder** > **Page Properties**. Use the`ObjectRelatedUrl` object to upload SEO-friendly URL slugs in the Salesforce Platform APIs that you typically use.

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Make Objects Available for SEO

When you make your site public, search engines can index the pages of your Experience Builder site. However, to ensure that you don't expose sensitive data, the data displayed by objects on those pages aren't public. Instead, you must specifically make those objects and their associated fields publicly available for indexing by search engines.

The guest user profile controls what unauthenticated users and search engines can see in a publicly available site. To make a standard or custom object's records available for indexing, provide Read access to that object and its fields. Every instance of that object, regardless of page location, is added to the sitemap.

Note:

- To ensure that object data is available to search engines, review the sharing rules, field-level security (FLS), and permission sets assigned to an object. Even though an object and its fields are public, Salesforce security settings still determine guest user access to this data.
- Ensure that all sensitive objects are private, even objects used in private pages that aren't included in the sitemap. All public pages and public objects are discoverable because search engines use the sitemap only as a starting point to identify which site content is available for crawling.
- Regularly review and update the objects and records that are public through your guest user profile. This best practice controls the scope of your sitemap and helps keep your site secure.
- To be included in your sitemap, knowledge articles on Aura sites must have at least one navigational topic assigned to them.

1. For Topics, Feed Items, and Questions pages, enabling object read access or creating a sharing rule isn't required. Instead, to allow access:
   a. In Experience Workspaces, select **Administration**.
   b. On the Preferences page, select **Give access to public API requests on Chatter** and **Let guest users see other members of this site**.
   c. Save your changes.
2. For standard and custom objects, configure which objects are public using the guest user profile:
   a. In Experience Builder, select the SEO setting tab.
   b. Click **Guest User Profile**.

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Applies to: LWR and Aura sites on page 8

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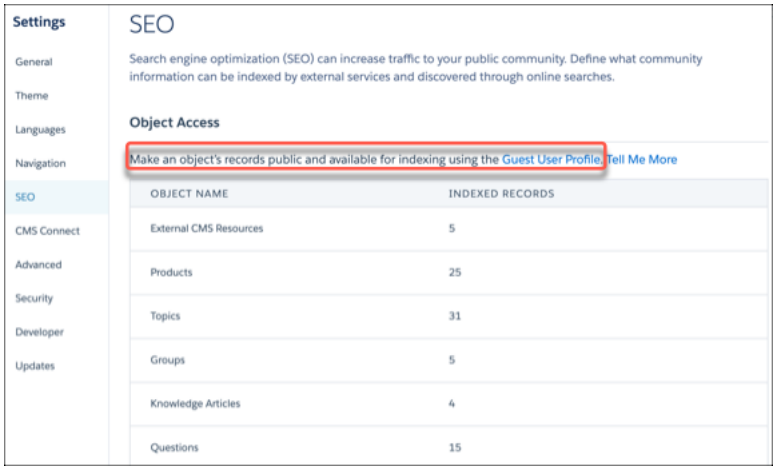
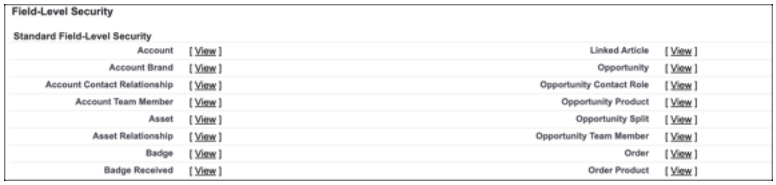


c. Click **Edit**, and in the Standard Object Permissions section, give at least read access to the object.

d. Save your changes.

3. Ensure that the appropriate object fields have read access using the guest user profile:

a. In the Field-Level Security section, click **View** beside the relevant object.



b. Save your changes.

4. Create a sharing rule for guest users for each public object.

Warning: Sharing rules allow immediate and unlimited access to all records matching the sharing rule's criteria. To secure your Salesforce data and give your site guest users access to what they need, consider all the use cases and implications of creating a sharing rule.

5. To make your changes live, publish your site.
It can take up to 24 hours for the list of available objects to appear along with the number of indexed records.

SEE ALSO:

Secure Guest Users' Sharing Settings and Record Access

SEO Best Practices and Considerations for Guest Users

Configure the Guest User Profile

Provide Search Engines with Fresh Content Snapshots

Experience Builder sites in your production org use the Content Snapshot service to generate SEO optimized HTML for web crawlers such as Googlebot, and content sharing platforms such as Facebook. The concept is common to single-page application frameworks known as dynamic rendering. Salesforce takes a snapshot when you make changes to your site's publicly available content. This functionality works well for most updates. But let's say you update a page with time-sensitive information, such as price changes for a flash sale. Instead of waiting, you can take a manual snapshot once every 24 hours to refresh the page content served to search engines.

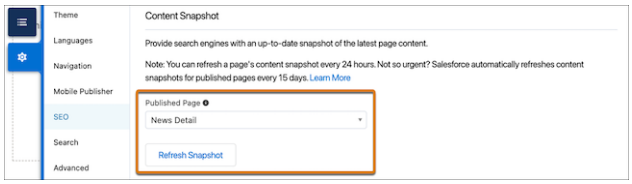
Tip: The Content Snapshot section appears in Experience Builder only after you set a preferred domain for your Experience Builder site and ensure that your site is publicly available.

A content snapshot is generated and served in production for every route included in your standard sitemap for all site languages added to your site. A snapshot includes views produced with the standard language parameter and record detail pages where the guest user has read access to one or more records. We don't recommend producing different content based on your own query string parameters because snapshots aren't supported for permutations of your own parameters.

1. In Experience Builder, update the page's content, and then publish your site to make your changes live.

   You can only take snapshots of published pages.

2. On the SEO settings tab, select the page in the Published Page dropdown.



3. Click **Refresh Snapshot**.

Manual snapshots are processed as quickly as possible, but your updates can take some time to appear in search results. If you request manual snapshot refreshes for a large volume of pages simultaneously, your snapshots won't all be updated at the same time.

SEE ALSO:

Best Practices and Tips for Using SEO in Experience Builder Sites

Generate a Manual Sitemap Refresh for Your Experience Builder Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites on page 8

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- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

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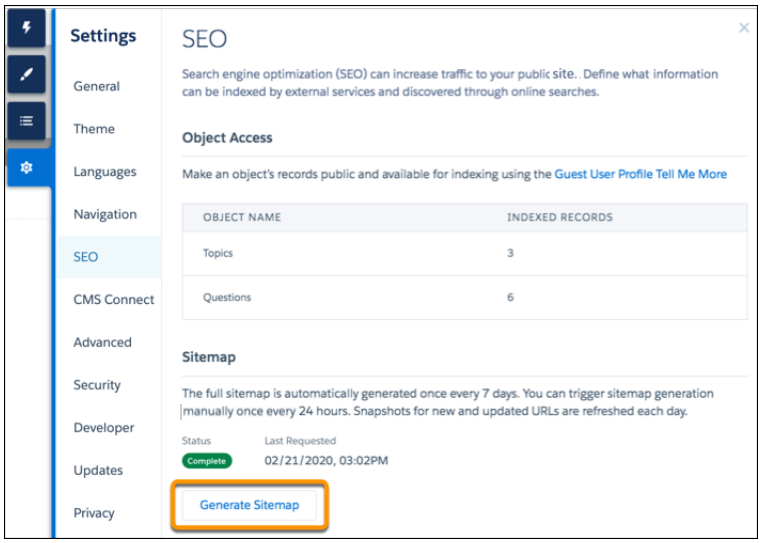
- Be a member of the site AND an experience admin or publisher in that site

Generate a Manual Sitemap Refresh for Your Experience Builder Site

When you go live with a new Experience Builder site or make significant updates to an existing one, you can generate a manual sitemap one time every 24 hours outside of the weekly automatic sitemap refresh.

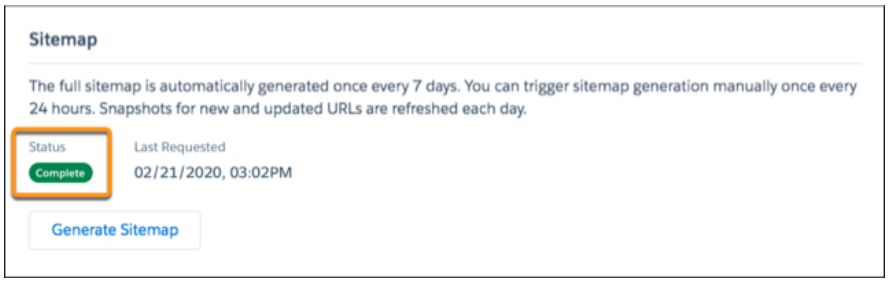
To initiate a manual refresh of your sitemap one time every 24 hours:

1. In Experience Builder, navigate to the SEO tab in settings.
2. Click the **Generate Sitemap** button to manually generate a sitemap for your site.



3. Track the status of the sitemap as it processes.

   The status bar shows In Progress while the sitemap generates. After your sitemap is generated, the status updates to read Complete.



Tip: For the best experience, generate a manual sitemap during off-peak hours.

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When you add new pages to your site, these links are included in an automatic partial sitemap refresh every 24 hours. If you add new pages after you manually generate a sitemap, they're added to the sitemap automatically.

SEE ALSO:

Provide Search Engines with Fresh Content Snapshots

Create a Custom robots.txt File for Your Experience Builder Site

Configure a Custom Domain for Your Experience Cloud Site

Reassign the Scheduled Jobs that Generate an Automatic Sitemap Refresh

To generate an automatic sitemap refresh, Salesforce uses an automated process called scheduled jobs. An automatic sitemap refresh requires two scheduled jobs that are associated with the account of the user who most recently published that site. If that user's account is deactivated, the scheduled jobs can't run, and your sitemap no longer refreshes automatically. To resume automatic sitemap refreshes, reassign the scheduled jobs that refresh the sitemap to an active or automated user account.

1. From Setup, in the Quick Find box, enter `Scheduled Jobs`, and then select **Scheduled Jobs**.
2. Find the scheduled jobs with job names that start with CommIncrementalSitemapJob or CommSitemapJob and that list the inactive user in the Submitted By column.
3. Next to the `CommIncrementalSitemapJob` and `CommSitemapJob` scheduled jobs submitted by the inactive user, click **Del**.
4. Republish all sites for which you deleted the scheduled jobs.

   The scheduled jobs are associated with the user who republishes the site. When you associate the scheduled jobs with an automated user account, you ensure that a deactivated user account can't affect your automatic sitemap refreshes again.

   To associate the scheduled jobs with an automated user account of an active user, after you delete the scheduled jobs, visit the site's `sitemap.xml` file. To view the `sitemap.xml` file, navigate to `https://site_URL/s/sitemap.xml` for Aura sites or `https://site_URL/sitemap.xml` for LWR sites.

If you have more than one site, repeat these steps for all `CommIncrementalSitemapJob` and `CommSitemapJob` scheduled jobs that list the inactive user in the Submitted By column.

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To edit a scheduled job:

- Customize Application

Best Practices and Tips for Using SEO in Experience Builder Sites

Follow these guidelines and best practices when optimizing SEO in your site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites on page 8

General SEO Best Practices

- Locate a site at the root level. To determine the location of your site, from Setup, in the Quick Find box, enter *Digital Experiences*, and then click **All Sites**. Then, check the address in the URL column. The address for a root-level site has the format `https://site_URL`. A site that isn't at the root level commonly has a URL with a path prefix in the format `https://site_URL/sub_path/`.

  If your site has a URL prefix, meaning it's not at the root level, you must create a root site. You submit the sitemap for the root-level site to search engines first, and then submit the URLs for the site with a path prefix.
- To ensure that your Knowledge articles are included in search results, assign at least one navigational, featured, or content topic to each article.
- If your org supports multilingual Knowledge articles, keep the same URL as the base language article. We don't recommend replacing the URLs of translated articles with language-specific URLs.
- To improve search results and help people decide whether it's the page they want, use a page's Title and Description properties.

  Note: You can use other `head` markup global tags to configure your social media tags from OpenGraph to Twitter. We restrict the tags, attributes, and values allowed in the `head` markup of your pages to improve security.
- To make the object page URL more readable for humans, change the page's base URL. Update all other references to your pages, such as object, detail, list, or related list, that you hand-coded from other pages or from links outside your site. These references aren't automatically updated.
- Pages with non-standard URLs, such as URLs that include query string parameters, aren't included in the sitemap or content snapshots. As a result, search engines can't crawl or index these pages. Therefore, avoid using standard pages to deliver dynamic data via URL parameters (`/s/product?productId=12345`). Instead, use object pages for the record pages to be crawled (`s/product/12345`).
- When creating a custom Aura component that generates a URL or navigates to a page, use `lightning:navigation` to generate proper `<a href>` links. Similarly, for custom Lightning web components, use `lightning-navigation`.
- 301 redirects ensure that users and search engines are directed to the correct page. For example, for a URL such as `www.my_site.com`, we recommend creating a redirect to `my_site.com`. You can set up these redirects with your DNS provider.
- To indicate that a page is a duplicate of another page, add a `<link>` element, with the attribute `rel=canonical` and point to the canonical page. For example, `<link rel="canonical" href="https://example.com/home"/>`. This action ensures that search engines crawl the canonical page and not a duplicate page.

Sitemap and `robots.txt` Files

- Don't create a custom sitemap for LWR or Aura sites. Custom sitemaps are difficult to maintain and scale. Instead, use the automatically generated `sitemap.xml` file.
- If you create a custom `robots.txt` file, it must include the paths to all sitemaps for the domain.
- When URL slugs are enabled and configured for product and category pages, they're used as the canonical URL in sitemaps created for LWR Commerce stores. Otherwise, the sitemap continues using the `recordId` URL.

- If you enable guest user access for an object that has existing records, manually trigger the full sitemap generation. Otherwise, the sitemap doesn't include the object's records until the next automatic sitemap regeneration, which can be up to a week later.

Data Security

- Regularly review and update the objects and records that are public through your guest user profile. This best practice controls the scope of your sitemap and helps keep your site secure.
- To ensure that object data is available to search engines, review the sharing rules, field-level security (FLS), and permission sets assigned to an object. Even though an object and its fields are public, Salesforce security settings still determine guest user access to this data.
- Ensure that all sensitive objects are private, even objects used in private pages that aren't included in the sitemap. All public pages and public objects are discoverable because search engines use the sitemap only as a starting point to identify which site content is available for crawling.

Testing and Validation

- Review the accuracy of your `sitemap.xml` file before submitting it to search engines. Navigate as an unauthenticated user to `https://<site_URL>/s/sitemap.xml` for Aura sites or `https://<site_URL>/sitemap.xml` for LWR sites. We suggest using Google Chrome's incognito mode. Ensure that the URLs listed in the site map are appropriate for guest users.

  Note: If a URL is mistakenly included in the sitemap, check that the correct permissions are enabled on the guest user profile and that your site is set up correctly for SEO.

- Many webmaster tools require verification of your site. One of the best ways to verify that your site is to add the meta tag provided by the web team tool to your `head` markup.
- Salesforce is a single-page application (SPA). So if you plan to use any third-party SEO tools to test your community, make sure that they're configured to crawl JavaScript-based sites properly.
- Check SEO performance and site speed using the free Salesforce Community Page Optimizer plug-in for Chrome.

SEE ALSO:

Blog Post: Advanced SEO for Lightning Communities

SEO for Experience Builder Sites

SEO Best Practices and Considerations for Guest Users

SEO for Experience Builder Sites FAQ

SEO for Experience Builder Sites FAQ

Answers to common questions about using SEO in your Experience Builder site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Applies to: LWR and Aura sites on page 8

Can I use SEO features on a sandbox org?

No, SEO features are supported on production orgs only.

Can I create a custom sitemap?

Don't create custom sitemaps for Aura or LWR sites, as they're difficult to maintain and scale. Instead, use the automatically generated `sitemap.xml` file.

How often is the sitemap generated?

If a site has been published, is active, and is public, the full sitemap is automatically generated one time a week, on Sunday. A partial sitemap refresh occurs every 24 hours and captures any changes made in the last day. You can manually regenerate a sitemap one time every 24 hours.

Can I manually generate a sitemap for my site?

If you go live with a new site or make significant changes to an existing site, you can manually generate a sitemap.

Tip: For the best experience, generate a manual sitemap during off-peak hours.

Why does the sitemap have references to other sitemaps?

The `sitemap.xml` file can contain only a limited number of URLs. For large sites, the sitemap is partitioned into multiple smaller sitemaps. These partitions organize the different public pages and objects in your site. Each partition is of the form `sitemap-object-#.xml`. The sitemap file also contains a partition called `sitemap-object-weekly.xml`. This partition contains new and updated pages from the current week, and is used for the daily partial sitemap refresh and the weekly sitemap generation. The `sitemap-object-weekly.xml` partition resets after that week's sitemap generation.

Does the sitemap include URLs for object pages?

If an object's detail page is public and you enable read access for the object, the URL for the detail page is included in the sitemap. You can make an object's list page public separately and include it in the sitemap by adding the page to the Navigation menu and then republishing your site. Related list pages are never included in the sitemap.

Why don't I see the automatically generated `robots.txt` file when I navigate to `https://<site_URL>/robots.txt`?

Your site must be at the root level of your custom domain for the `robots.txt` file to appear. If you don't have a custom domain set up and you're using the `*.force.com` or `*.my.site.com` domain, then a site without the path prefix must exist.

How do I change the indexing directives of the default `robots.txt` file?

You can create a custom `robots.txt` file to implement a rules-based method to control the visibility of specific areas of your site to search engines. Pages whose URLs you add to the Disallow section of a custom `robots.txt` file can still appear in search results. To hide a public site page from search results use the `noindex` meta tag.

Can I remove the `/s/` from the default site URL in Aura sites?

No, the `/s/` is required in the default URL for Aura sites. It's not required for LWR sites.

Does each article have its own URL?

Yes, each article that appears in the Article Detail page has its own URL, which is retrieved from the Knowledge article's `URL Name` field.

Article URLs use the format `/article/:urlName`. However, the article's `recordId` is available for use with components on the Article Detail page, like the Article Content component. The `recordId` on the page is set to the most recent Knowledge Article Version ID for a published article, uniquely defined by the URL Name and, if present, the translation language.

Tip:

- If your org has custom components that rely on the article's `urlName`, update the components to use `recordId` instead.

- If your org supports multilingual Knowledge articles, keep the same URL as the base language article. We don't recommend replacing the URLs of translated articles with language-specific URLs.

Which bots are allowed to crawl Experience Builder sites, or get served their content snapshot?

- googlebot
- adsbot-google
- gsa-crawler
- chrome-lighthouse
- slurp
- bing
- baidu
- ask
- facebook
- facebot
- twitterbot
- linkedinbot
- swiftbot
- slackbot

Can I update the title and add a description to articles to improve search engine results?

Each Knowledge article has a `URL Name`, a `Title`, and a `Summary` field. When the article's displayed in the Article Detail page in Experience Builder, these fields are used for the page URL, the `title`, and `description` tags on the page `<head>`.

Are pages with non-standard URLs, such as custom vanity URLs or URLs that include query string parameters, supported for SEO?

No, pages with non-standard URLs aren't included in the sitemap or content snapshots. Therefore, search engines can't crawl or index those pages.

For example, instead of using standard pages to deliver dynamic data via URL parameters (`/s/product?productId=12345`), use object pages for the record pages to be crawled (`s/product/12345`).

How do I indicate that a version of a page is non-canonical?

When different versions of a page exist, search engines crawl only the canonical version of a page. To stop the search engine from arbitrarily choosing a URL as the canonical version of multiple pages, indicate that a page is a duplicate of another page (that is, non-canonical). To do so, add a `<link>` element, with the attribute `rel=canonical` and point to the canonical page. For example, `<link rel="canonical" href="https://example.com/home" />`.

How are non-canonical URLs for object pages handled?

To improve your site's SEO ranking, we redirect non-canonical URLs to canonical URLs using 301 redirects. A canonical URL lets you tell search engines that slightly different URLs, which all point to the same content, are actually the same thing. A 301 redirect indicates that a URL has been permanently moved, which is optimal for SEO.

For example, let's say you add object pages for the Account object. In this case, the detail page has an object-specific Account Detail page and a generic Record Detail page. When site members access the generic Record Detail page (`/s/detail/`*`recordId`*), they're permanently redirected to the canonical URL of the object-specific Account Detail page instead (`/s/account/`*`recordId`*). Similarly, 301 redirects are used for list and related list pages.

Note: URL redirects occur only when a URL is accessed directly from the browser URL bar or from a link that's external to your site.

How are SEO-friendly URLs created for object detail pages?

To create a user-readable URL for the detail page of a standard or custom object, we append the value of the object's Name field to the URL. For example, for AW Computing's Account Detail page, we redirect `https://mysite.com/s/account/001R0000002NzuaIAC` to `https://mysite.com/s/account/001R0000002NzuaIAC/aw-computing`.

Where the Name field isn't available, we use the Subject or Title fields. Otherwise, we append "detail" to the URL.

Note: The Case, Dashboard, Group, Report, and User Profile objects aren't supported.

How do I get analytics for material brought in using CMS Connect?

Remember, the content you display in your site when using CMS Connect (JSON) doesn't live in your site. Getting usage data requires a few extra steps.

To configure External Objects for the data that you want to track, use Reports or OData, Salesforce Reporting.

SEE ALSO:

SEO for Experience Builder Sites

Best Practices and Tips for Using SEO in Experience Builder Sites

Best Practices and Considerations for Page-Level Access in Experience Builder

Connect Experience Cloud to Data Cloud (Beta)

To provide customers the personalized, individual experiences they now expect, you need detailed insights about your users and how you can best engage with them. By connecting your enhanced LWR sites to Data Cloud, you can capture user interaction data, like clicks, scrolls, and product interactions, and send that to Data Cloud. From there you can organize your data and use it to create user profile maps, build robust site analytics, personalize your sites, generate recommendations, and discover new ways to use AI.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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Applies to: LWR sites

Note: This feature is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

Important: The Data Cloud integration isn't available in Developer Edition orgs with Namespace configured.

Note: This topic includes steps found in multiple products and requires different roles to complete.

Set Up Data Cloud

If you're new to Data Cloud, your org requires some setup to get everything flowing correctly.

1. Data Cloud admin—If you're new to Data Cloud, start with Get Started Using Data Cloud. If not, skip to step 2.

Connect Your Enhanced LWR Site to Data Cloud (Beta)

To capture detailed information about your site interactions and send it to Data Cloud for ingestion, connect your enhanced LWR sites to Data Cloud.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, click **Digital Experiences**, and then click **Settings**.
2. Select **Integrations**.
3. On the Data Cloud card, select **Add to Site**.
4. Click **Share site data with Data Cloud**.

   The integration process can take up to 60 minutes.
5. Check your email for confirmation that your setup is complete. When you receive your confirmation email, publish your site.

USER PERMISSIONS

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- Create and Set Up Experiences AND View Setup and Configuration

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Track User Interactions

After your integration is set up, a portfolio of events are automatically mapped to Data Cloud. User consent is turned off by default for Experience Cloud sites. That means that even if you turn on Data Cloud, user information isn't captured until you consent on behalf of your customers or implement a consent-management platform (CMP) app. Before starting this task, make sure you've turned on Data Cloud in your site.

1. Create consent management options.
2. Check out our event reference guide to find out what you're tracking.
3. Your Experience Cloud data kit is designed to work automatically. We recommend reviewing Data Cloud Setup after you complete steps 1 and 2 to make sure everything is working properly.

Add Salesforce CMS Content to Your Experience Builder Site

Use the Digital Experiences App to create, manage, and publish engaging content for your Experience Builder site. Then display your Salesforce CMS content on your Aura or LWR site using Experience Builder tools. When you use Experience Builder sites together with Salesforce CMS, you can keep your brand and content consistent everywhere the content is published.

Experience Builder and site templates help you create, brand, and publish a custom site. You can choose from several templates, all of which come with components that you can use to add CMS content to your Aura and LWR site pages.

Salesforce CMS is a hybrid content management system where you can create, manage, and publish content from CMS workspaces to multiple channels, including Experience Builder sites.

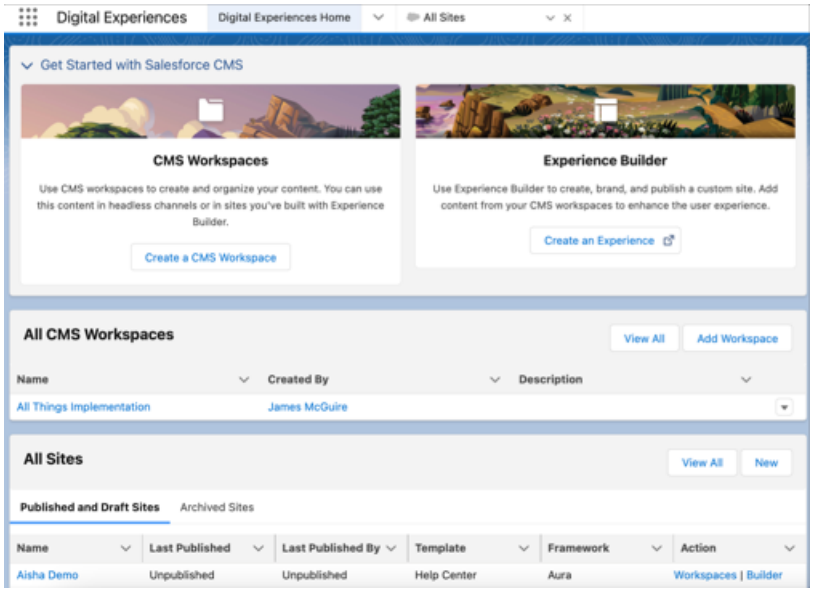
You can access your sites and Salesforce CMS workspaces from the Digital Experiences app, which is available through the App Launcher. View and manage your CMS workspaces and your Aura or LWR sites right from the Digital Experiences Home tab.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites



Tip: Experience Cloud and Salesforce CMS have workspaces. In Experience Cloud, you use a site's workspace to configure settings and find information about your site's metrics and user engagement. In CMS workspaces, you create and manage CMS content and publish it to multiple channels.

Before you can use Salesforce CMS content on your Experience Builder site, ensure that your site is based on the most up-to-date Lightning template.

Connect Salesforce CMS to your Experience Builder site by adding the site as a channel to your Salesforce CMS workspace. Next, ensure that all content that you want to display on your site is published in your workspace. Content must be published before you can use it on your Aura or LWR sites.

Note: Although the Digital Experiences app is available in sandboxes, you can't migrate CMS content to production. We recommend that you use the Digital Experiences app in production to create content that you plan to use beyond testing.

Already have a CMS? You can use content from another CMS in your Experience Builder site for consistent branding, reuse of material, and ease of maintenance. See Connect Your External CMS to Your Experience Builder Site in *CMS Developer Guide* to learn more.

Display Salesforce CMS Content in Your LWR Site

Create content in Salesforce CMS that matches your branding and messaging, and then use the content on any Lightning Web Runtime (LWR) site. Dynamically display Salesforce CMS content in your LWR site with data binding components in Experience Builder. You can nest one component within another, add unique images, and create engaging pages with CMS content.

Display Salesforce CMS Content in Your Aura Site

Deliver and organize CMS content with Experience Builder and Content Management. Use Experience Builder to configure the content formatting and layout on your site pages. And use Content Management to organize your CMS content into collections and topics.

SEE ALSO:

Add a Channel to a CMS Workspace

Display Salesforce CMS Content in Your LWR Site

Create content in Salesforce CMS that matches your branding and messaging, and then use the content on any Lightning Web Runtime (LWR) site. Dynamically display Salesforce CMS content in your LWR site with data binding components in Experience Builder. You can nest one component within another, add unique images, and create engaging pages with CMS content.

Data binding establishes a connection between data sources such as Salesforce CMS and a site's user interface. Components used in LWR sites populate with content saved in the CMS and display the content based on parameters that you set on the site.

To learn more about data binding in LWR sites, watch: Did You Know: Discover LWR Sites (English Only)

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

Add Content to Your LWR Sites with Data Binding

Use data binding to populate your LWR sites with Salesforce CMS content. Drop components that support data binding onto your site page and map them to content from Salesforce CMS.

Use a Grid Component to Show Enhanced CMS Collections and List Views in LWR Sites

The Grid component dynamically populates with data that's saved in enhanced CMS collections and record list views. After you pick a data source, you add a content component within the grid to show the content that you want. The component provides data binding and pagination logic.

Add an Image from Salesforce CMS to Your LWR Site

Add images from Salesforce CMS as standalone images on your site page or add new images to components populated with CMS content. You can update images attached to CMS content in Experience Builder without changing the image in your Salesforce CMS workspace.

Nest Content Components in Your LWR Site

Nest content components within layout components on your LWR site to showcase more content from your Salesforce CMS. Create eye-catching content displays by nesting components that use data binding.

Bind Data to CMS Content Pages in Your LWR Site

Data-bound components used on CMS content pages automatically populate with content saved in Salesforce CMS. Map fields in the component property panel to fields in CMS content.

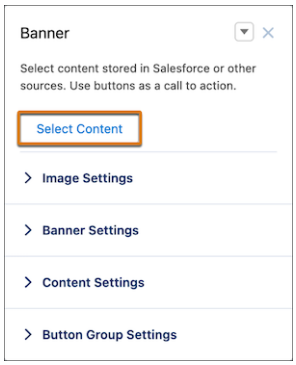
SEE ALSO:

Create Content in a CMS Workspace

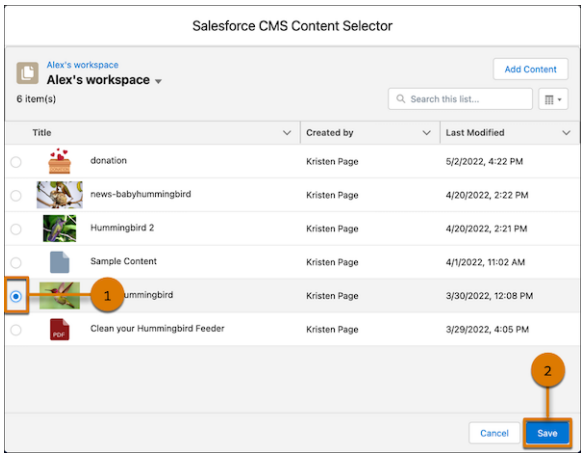
Add Content to Your LWR Sites with Data Binding

Use data binding to populate your LWR sites with Salesforce CMS content. Drop components that support data binding onto your site page and map them to content from Salesforce CMS.

1. In Experience Builder, click **Components**.
2. Drag a layout component that supports data binding onto the page. The Banner, Card, Grid, Overlap, and Tile components support data binding.
3. In the component property panel, click **Select Content**.



4. Select the content that you want to add from the list of published CMS content items (1), and then save your changes (2).



5. In the component property panel, customize the content layout, including component size, font size, image position, overlays, and more.
6. Click the component fields and map them to elements of your CMS content. Adjust settings as needed.

   For example, in a Banner component, click the Text Block component that's nested in the Banner component (1). Then, under Text or Expression in the component property panel, link to the Title field of a Salesforce CMS content item (2).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

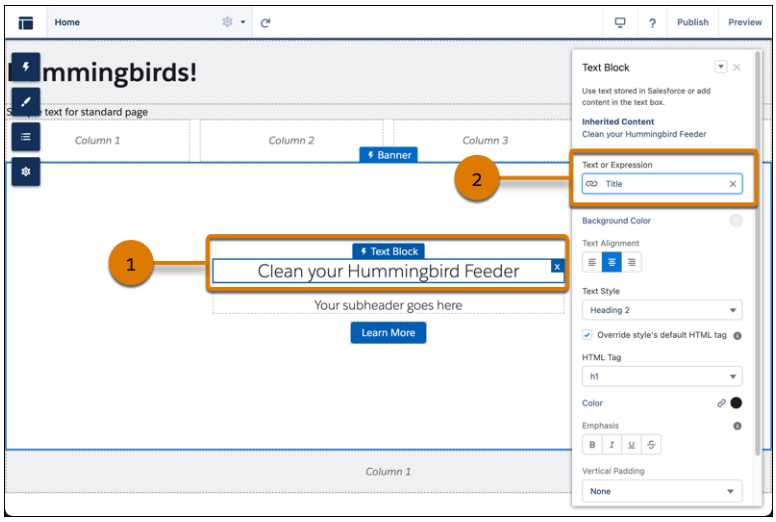
USER PERMISSIONS

To customize an LWR site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site



7. Continue customizing how the content appears on your site in the component property panel.

Here are some considerations when using data binding components.

- If a component points to site page that's deleted, reconfigure the component to point to an alternate site page.
- If a component points to a listview or related listview whose API name is changed, reconfigure the component to point to an alternate listview or related listview.
- Although the Text Block, HTML Editor, Image, Video, and Button components don't support direct data binding on the Home page, they're data-bound when used on detail pages. And you can nest them in other data-bound components. On detail pages and as nested components, they inherit content from the data-bound component where they're nested.

See data binding in action in the Did You Know Series (English Only).

SEE ALSO:

Bind Data to CMS Content Pages in Your LWR Site

Add an Image from Salesforce CMS to Your LWR Site

Nest Content Components in Your LWR Site

Use a Grid Component to Show Enhanced CMS Collections and List Views in LWR Sites

Use a Grid Component to Show Enhanced CMS Collections and List Views in LWR Sites

The Grid component dynamically populates with data that's saved in enhanced CMS collections and record list views. After you pick a data source, you add a content component within the grid to show the content that you want. The component provides data binding and pagination logic.

1. In Experience Builder, click **Components**.
2. Drag the Grid component onto the page. You can add the component to any standard or object page.
3. Select a data source: a CMS collection or record list view.
4. Select the layout and design options for the content.
5. Select a content component to show the content. Commonly used components include Text Block, Tile, and Image.
6. Map the fields for the content that you want to display. For example, you can map the Text Block in a Tile component to a blog title, image, or similar content.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

You must have at least one active community license in your org to use this feature.

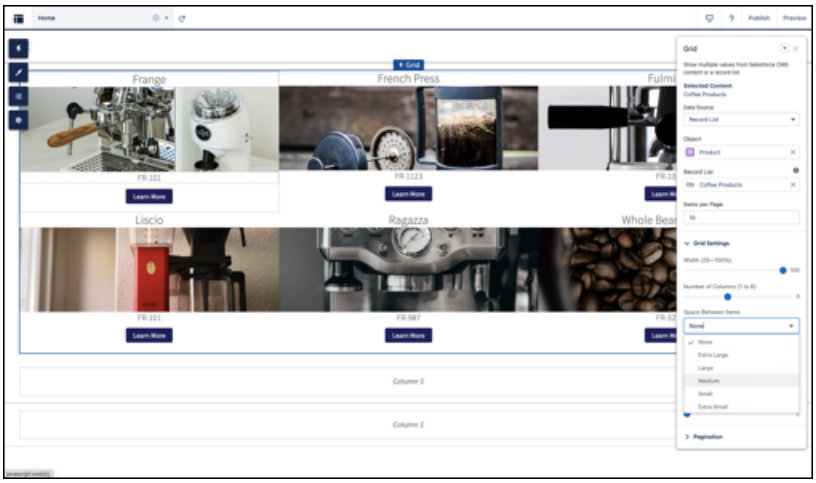
USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site



Note:

- CMS collections are available only in Enhanced LWR sites.
- Grids backed by CRM record list views show a maximum of 2,000 records.

- When you use record list as your data source, the only fields you can bind to are fields that have been selected in the list view. For example, if you want to show the All Accounts list view, and the list view shows five fields in your internal org, only those five fields are shown as options for data binding.

SEE ALSO:

Collections In Enhanced CMS Workspaces

Add an Image from Salesforce CMS to Your LWR Site

Add images from Salesforce CMS as standalone images on your site page or add new images to components populated with CMS content. You can update images attached to CMS content in Experience Builder without changing the image in your Salesforce CMS workspace.

1. In Experience Builder, click **Components**.
2. Drag the **Image** component onto the page. You can add images from your Salesforce CMS to any component that supports data binding.
3. In the component property panel, click **Select Image from CMS**.
4. Select the image and save your change.

See data binding in action in the Did You Know Series (English Only).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

USER PERMISSIONS

To customize an LWR site:

- Be a member of the site AND Create and Set Up Experiences

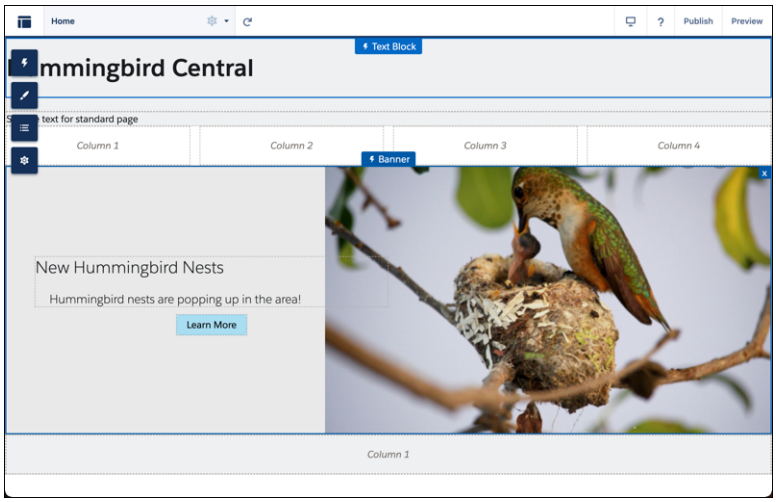
  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

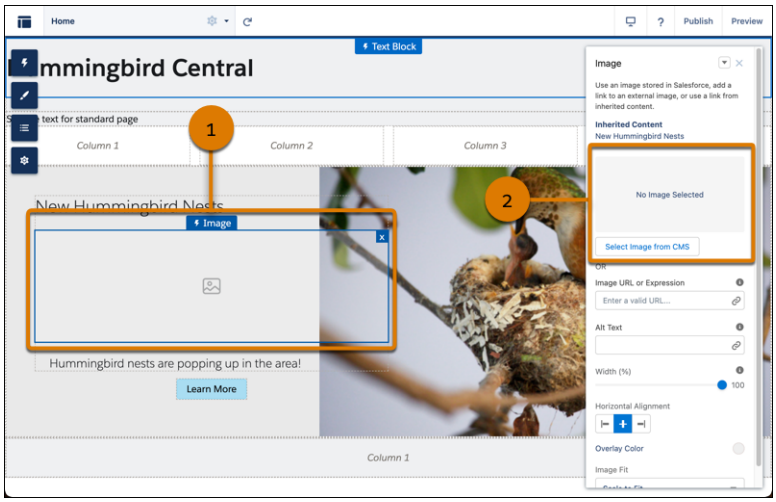
Nest Content Components in Your LWR Site

Nest content components within layout components on your LWR site to showcase more content from your Salesforce CMS. Create eye-catching content displays by nesting components that use data binding.

1. In Experience Builder, navigate to a page that's already populated with a layout component such as Banner or Tile.



2. To nest components, drag any content component, such as Image or Rich Content Editor, into the content region of the layout component (1).
3. In the component property panel for the nested component click **Select Content**. Or if you added an Image, click **Select Image from CMS** (2).



4. Select the content to add from the list of published CMS content items, and save your changes.
5. Click the component fields and map them to elements of your CMS content. Adjust settings as needed.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

USER PERMISSIONS

To customize an LWR site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

See data binding in action in the Did You Know Series (English Only).

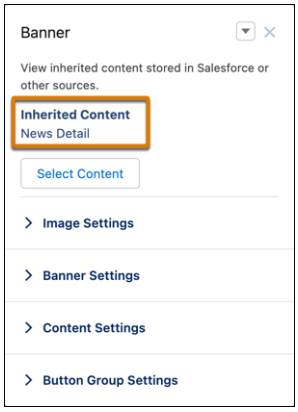
SEE ALSO:

Add an Image from Salesforce CMS to Your LWR Site

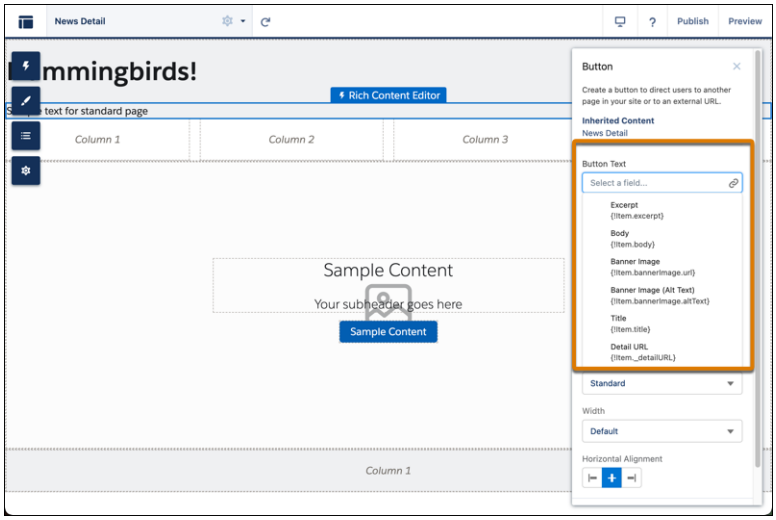
Bind Data to CMS Content Pages in Your LWR Site

Data-bound components used on CMS content pages automatically populate with content saved in Salesforce CMS. Map fields in the component property panel to fields in CMS content.

1. In Experience Builder, navigate to a CMS content page such as News Detail or Document Detail and click **Components**.
2. Drag a component that supports data binding onto the page. In the component property panel, you already have content that's inherited from the content pages.



3. Click the component fields and map them to elements of your inherited CMS content in the component property panel. You can bind data from any field on the detail page, including custom fields. The content then populates automatically in the component.



EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

USER PERMISSIONS

To customize an LWR site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

To use a component on a detail page without binding content, click the chain link icon next to the data source to unlock the content. Add your own content or paste in a valid URL in the field instead to link to static content.

4. Continue customizing how the content appears on the CMS content page in the component property panel.

See data binding in CRM records in action in the Did You Know Series (English Only).

Display Salesforce CMS Content in Your Aura Site

Deliver and organize CMS content with Experience Builder and Content Management. Use Experience Builder to configure the content formatting and layout on your site pages. And use Content Management to organize your CMS content into collections and topics.

To display CMS content on your Aura site, first create the site in Experience Builder. Then, in the CMS workspace where you created and published the content, add the site as a channel.

In Experience Builder, control and customize how your Salesforce CMS content appears on your site pages using CMS components such as CMS Single Item or CMS Collection. Choose which type of content to show, such as an image, document, a news item, or a CMS collection. And format the content so that it appears exactly how you want it on your site.

- CMS Single Item
- CMS Single Item (Detail)
- CMS Collection

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

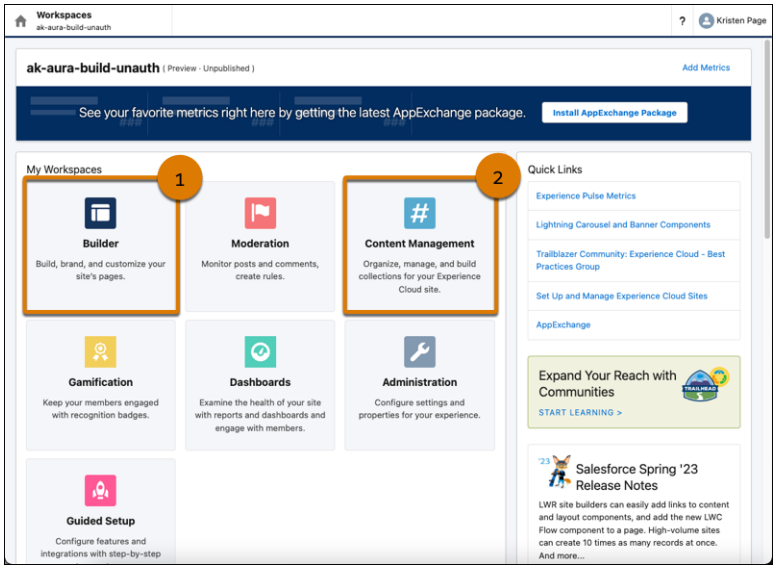
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

In Content Management, create collections and topics to organize multiple items of Salesforce CMS content. Collections and topics help you group related content items for use in your Aura site. Collections and topics are unique to each Aura site, so you can reuse and reorganize CMS content for different audiences.

- Salesforce CMS Collections for Aura Sites
- Salesforce CMS Topics for Aura Sites

Access Experience Builder (1) and Content Management (2) from your site's Workspaces.



Salesforce CMS Collections for Aura Sites

Collections help you organize and display multiple pieces of content from your Salesforce CMS workspace on your Aura site. View, create, and edit collections in the Collections tab in the Content Management tile of your Aura site's workspace. Create collections manually or collections that update automatically.

Salesforce CMS Topics for Aura Sites

Assign topics to Salesforce CMS content so that it's easier to organize and display on your Aura site. Topics help you organize your Salesforce CMS content in the same way that they help you manage your Experience Cloud site's feeds.

SEE ALSO:

Create Content in a CMS Workspace

Salesforce CMS Collections for Aura Sites

Collections help you organize and display multiple pieces of content from your Salesforce CMS workspace on your Aura site. View, create, and edit collections in the Collections tab in the Content Management tile of your Aura site's workspace. Create collections manually or collections that update automatically.

Managing and curating content isn't always done in a straight line. For instance, you can publish several news articles in your Salesforce CMS workspace and create a complete collection containing those articles. Or you can create a CMS collection before you write content in your CMS workspace.

- Create a manual collection by adding individual CMS content items one at a time. You can add the manual collections to your Aura site, and the collection doesn't change unless you add or remove content.
- Create conditional collections to automatically show updated CMS content on your Aura site. With conditional collections, you can create and apply filters to collect content that meets your defined criteria. For instance, you can create a collection that automatically selects new products for the month, rather than manually creating collections each month.

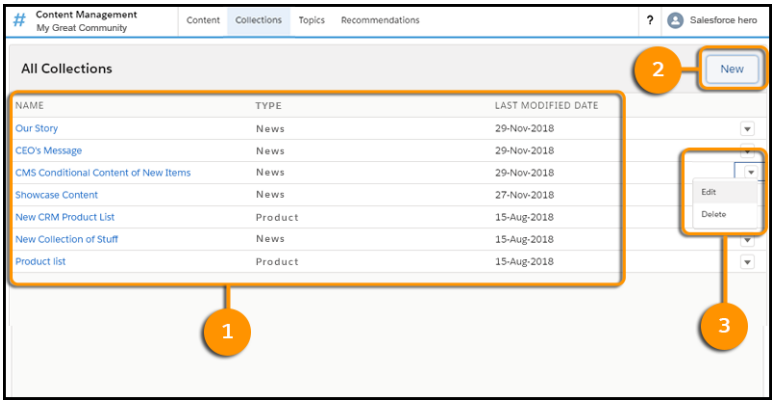
EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

In Content Management, the Collections page lists your existing collections by their title, type of content, and last modified date (1). On this page you can create a collection (2) and edit or delete collections from the row-level menu (3).



After you create collections, you can populate your Aura site with content by using CMS Collection components in Experience Builder. Any new or updated content that meets your criteria displays automatically.

Create a Manual CMS Collection for Your Aura Site

Create hand-picked static collections of Salesforce CMS content. Select and add specific content in a few clicks, and edit the collection at any time from the Content Management workspace. Create manual collections to gather CMS content items of a single content type.

Edit a Manual CMS Collection in Your Aura Site

Edit manual CMS Collections in Content Management to keep the content in your Aura site up to date.

Create a Conditional CMS Collection for Your Aura Site

Make collections by creating filters that automatically include content that meets your defined criteria. To achieve complex and targeted results in your collection, combine several layers of filters.

SEE ALSO:

Create Content in a CMS Workspace

Create a Manual CMS Collection for Your Aura Site

Create a Conditional CMS Collection for Your Aura Site

CMS Collection

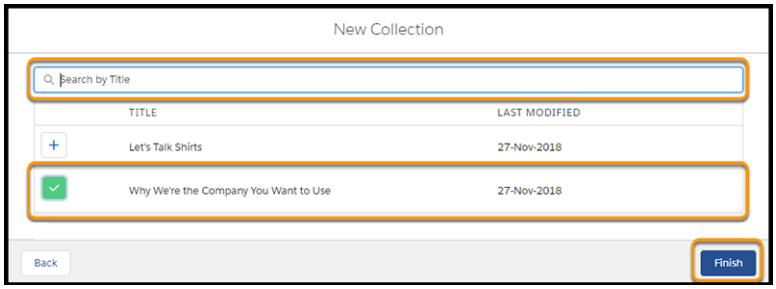
Create a Manual CMS Collection for Your Aura Site

Create hand-picked static collections of Salesforce CMS content. Select and add specific content in a few clicks, and edit the collection at any time from the Content Management workspace. Create manual collections to gather CMS content items of a single content type.

1. In Content Management, select **Collections**, and click **New**.
2. In the New Collection window, enter a descriptive name for the collection, select **CMS Content**, and click **Next**.

   Tip: To make your collection easy to locate, give it a descriptive name.

3. From the dropdown menu, choose the content type that you want to include, and select **Manually**.
4. To add content to the collection, click + beside each content item.



5. Click **Finish**.

SEE ALSO:

Create Content in a CMS Workspace

Edit a Manual CMS Collection in Your Aura Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To access Experience Workspaces or Experience Builder:

- Create and Set Up Experiences

  AND

  Is a member of the community, portal, or site

To customize an Experience Builder site:

- Create and Set Up Experiences OR assigned an experience admin, publisher, or builder role in that site
- AND is a member of the site

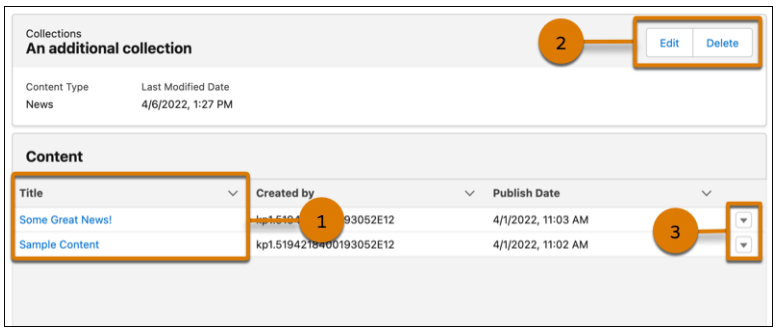
To create collections using CMS content:

- Assigned a content admin or content manager role in that CMS workspace

Edit a Manual CMS Collection in Your Aura Site

Edit manual CMS Collections in Content Management to keep the content in your Aura site up to date.

1. In Content Management, go to the Collections tab.
2. Select the collection that you want to edit.
3. To view more details about the content such as the content body or slug, click the content title (1).
4. To change the title or to add or remove content from the collection, click **Edit** (2).
5. To change the order of how the content appears on your site, move items up or down in the list (3).



If you want to delete the Collection, click **Delete**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To access Experience Workspaces or Experience Builder:

- Create and Set Up Experiences

  AND

  Is a member of the community, portal, or site

To customize an Experience Builder site:

- Create and Set Up Experiences OR assigned an experience admin, publisher, or builder role in that site
- AND is a member of the site

To create collections using CMS content:

- Assigned a content admin or content manager role in that CMS workspace

Create a Conditional CMS Collection for Your Aura Site

Make collections by creating filters that automatically include content that meets your defined criteria. To achieve complex and targeted results in your collection, combine several layers of filters.

1. In Content Management, select **Collections**, and click **New** or **Create Collection**.
2. To make your collection easy to identify, enter a descriptive name in the New Collection window, select **CMS Content**, and click **Next**.
3. From the dropdown menu, choose the content type that you want to include, select **Conditionally**, and click **Next**.
4. In the Rule for Finding Content dropdown, choose
   - All Criteria are Met. This rule treats all your filters as ANDs, allowing only content that meets all the criteria to be included in the collection.
   - Any Criteria is Met. This rule treats all your filters as ORs, allowing any piece of content that meets any one of the criteria to be included in the collection.
5. To create a filter, select a filter type from the Filter By dropdown, then an operator from the When dropdown, and enter a value in the Value field to compare against.

Filter type	Description
Topic	Has a single operator, called Includes, that searches for CMS content tagged with the topic listed in the value field. When adding more than one topic, separate them with commas. For any given collection, you can only have one topic filter with up to 1,000 characters defining it.
Publish Date	Has multiple operators that evaluate against the most recent publish date of available CMS content. Values can be entered as region-specific numeric dates or as date literals, like Today or Last Week. For more information see Relative Date Filter Reference.
Title	Has two operators that evaluate against the Title field of your available CMS content for an exact (Equals) or partial match (Contains).

6. To create filters that further refine your collection, click **+ Add Criteria**. You can use up to 10 filters to define a collection.
7. When you're done adding filters, click **Finish**.

SEE ALSO:

Create Content in a CMS Workspace

Create a Salesforce CRM Collection for Your Aura Site

Salesforce Help: Relative Date Filter Reference

Developer Guide: Comparison Operators

Developer Guide: Logical Operators

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To access Experience Workspaces or Experience Builder:

- Create and Set Up Experiences

  AND

  Is a member of the community, portal, or site

To customize an Experience Builder site:

- Create and Set Up Experiences OR assigned an experience admin, publisher, or builder role in that site
- AND is a member of the site

To create collections using CMS content:

- Assigned a content admin or content manager role in that CMS workspace

Salesforce CMS Topics for Aura Sites

Assign topics to Salesforce CMS content so that it's easier to organize and display on your Aura site. Topics help you organize your Salesforce CMS content in the same way that they help you manage your Experience Cloud site's feeds.

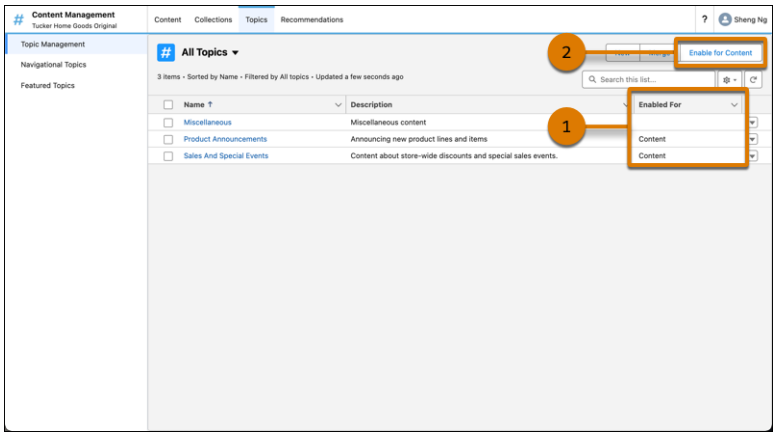
In the Topics tab of your Content Management workspace, create and manage topics for your Aura site. When you're creating topics, ensure that they're enabled for content (1). If they're not enabled, select the topic, and click **Enable for Content** (2).

EDITIONS

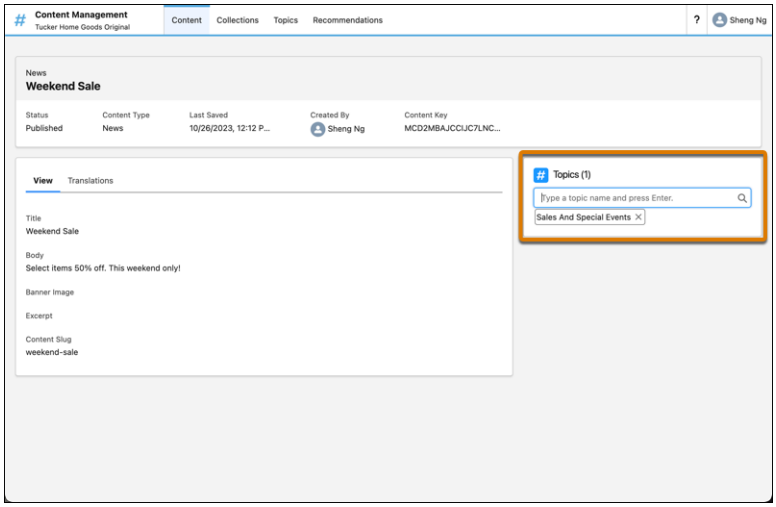
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites



To assign a topic to a piece of CMS content, select a piece of content from the Content tab, and assign a topic name.



Note: Topics are similar to other list views and subject to the same limitations. For more information, see List View Search Limitations.

SEE ALSO:

Organize Experience Cloud Sites with Topics

Set Up Content Topics

Add Salesforce CRM Data to LWR or Aura Sites

To help your users, customers, and partners accomplish more, share Salesforce CRM data on your Experience Builder site. Aura and LWR sites have different tools for displaying CRM data.

Always keep your critical data secure and share only the data that you want users to see and access. For more information, see Share CRM Data in an Experience Cloud Site.

Note: Not sure which site template or framework you're using? Go to the All Sites list in the Digital Experiences app, and view the Template and Framework columns. You can see an Enhanced badge beside enhanced LWR sites in the Framework column.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

The tools for sharing CRM Data on your Experience Builder site depend on whether you're building an Aura or LWR site.

- For Aura sites, share CRM data by using Content Management in Experience Workspaces and Experience Builder. In Content Management, add CRM Connections, and create and manage CRM Collections. With CRM Collections, you can display object data on your site in a cohesive package with customizable list views. In Experience Builder, add data to object pages by using CMS components such as CMS Collection.
- For LWR sites, share CRM data by using Experience Builder. In Experience Builder, you add CRM data to your site using data-binding components such as Banner, Card, Grid, Overlap, and Tile.

Show CRM Data in Your Aura or LWR Site Using Object Pages

In Aura and LWR sites, you can use object pages to show CRM data. Object pages include a record detail page, a record list page, and a related list page. Each page provides different views and details about object data.

Show Record Lists in Your Aura or LWR Site Using Navigation Menus

Create record list views for objects such as accounts, cases, contacts, and custom objects, and link to them from your site's Navigation Menu or Tile Menu components.

Bind Data to CRM Record Detail Pages in Your LWR Site

Data-bound components used on CRM record detail pages automatically populate with content saved in Salesforce CRM data in records. Map fields in the component property panel to fields in the CRM records.

Add Salesforce CRM Data to Your Aura Site

Enable your users to do more when you share Salesforce CRM data in your Aura site. Create CRM collections in the Content Management Workspace, and customize how your CRM data appears on your site using Experience Builder.

External Data Sources in Your Experience Cloud Site

Use Salesforce Connect and Salesforce Files Connect to access external data and content stored outside of your Salesforce org from your site.

Show CRM Data in Your Aura or LWR Site Using Object Pages

In Aura and LWR sites, you can use object pages to show CRM data. Object pages include a record detail page, a record list page, and a related list page. Each page provides different views and details about object data.

Create and assign an object page for every object that you share on your site. If you don't assign an object page, users land on a generic object page when they click a link to CRM data on your site.

The three standard object pages are:

- Record Detail: This page shows details about an individual record for your object.
- Record List: This page shows the list of records for the object.
- Related Record List: This page shows a list of records for an object related to the primary object. For example, the related record list page for the Account object contains records for the Contact object.

To customize object pages in Aura sites, you can use several components, including Record Banner, Record Detail, Record Information Tabs, Record List, and Record Related List.

To customize object pages in your LWR site, you can use the Record Detail (Beta) component.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

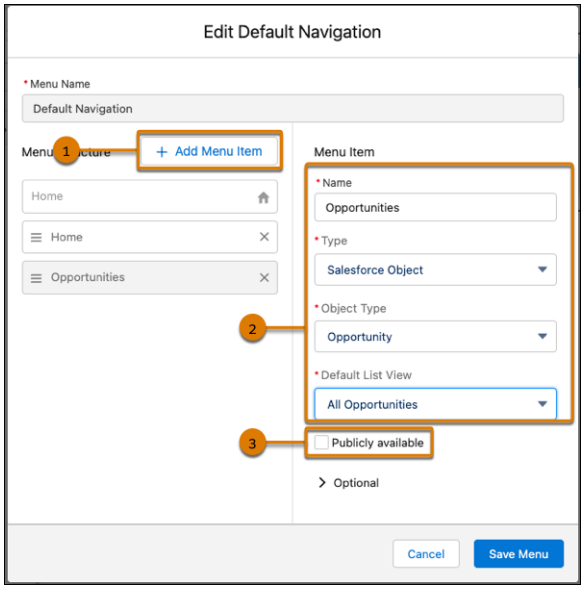
Show Record Lists in Your Aura or LWR Site Using Navigation Menus

Create record list views for objects such as accounts, cases, contacts, and custom objects, and link to them from your site's Navigation Menu or Tile Menu components.

1. In Experience Builder, add a Tile Menu or Navigation Menu component to the appropriate site page.

   Alternatively, if you're using the Customer Service, Partner Central, or Customer Account Portal Templates, you can click the default Navigation Menu component, which is in the page header.

2. Go to **Settings** > **Navigation**. Or in the property panel, click **Edit Default Navigation**.
3. Click **Add Menu Item** (1).
4. Give your new menu item a name, and from the Type dropdown, select **Salesforce Object**. Then select the Object Type and your desired List View (2).
5. If you want guest users to access your new record list view page, enable **Publicly available** (3).



6. Save your changes.

If your site is active, users see the changes to your navigation menu immediately. Under the hood, your data is retrieved from Salesforce and displayed using the generic record list page. The generic Record List page provides the default list view layout for objects without a predefined or custom list view page assigned. For example, if you create a navigation menu item for another Salesforce object, it uses this same generic page. If you modify the record list page, be sure to account for all the affected objects that rely on the page.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

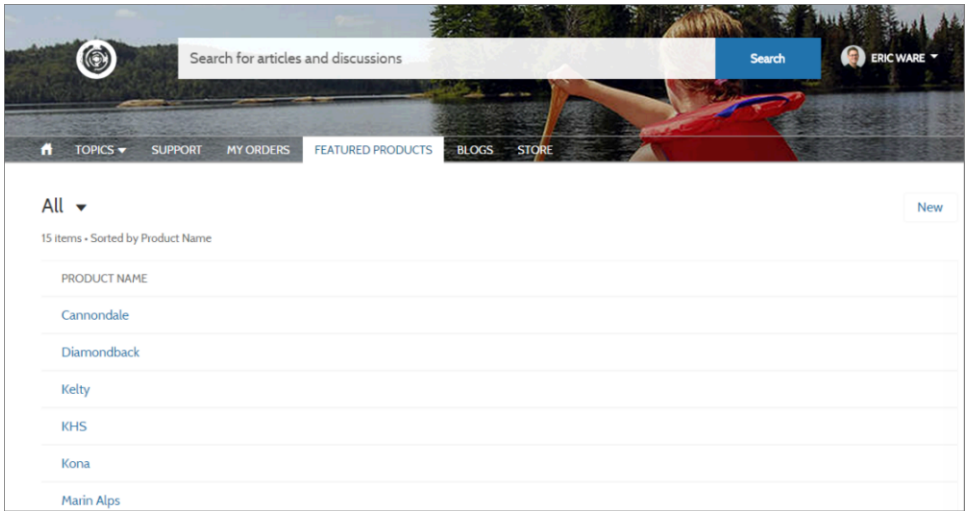
- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Important: The Help Center and LWR templates don't include generic record pages, so you also must create the corresponding object pages. If you don't create the object pages, your end users don't see anything when they click the menu item.

Example: A list view page for a custom object called Featured Products.



- Users can access only records they have access to via licenses, profiles, permissions, and sharing rules, same as in Salesforce. Users with the "Create" permission for the object can create records from the list view page. The ability to create records from this page isn't supported on mobile devices.
- When users click a record on this page, the record details are displayed using the layout from the generic Record Detail page. If you create a custom record detail page and assign it to the object, we use that page instead.
- When creating record list views in Experience Cloud sites using Experience Builder, picking a default list view value other than Default overrides the user's pinned list. If you want users to access their own pinned lists, leave the list view as Default. Otherwise, users see whatever list view was set as the default, even if they have a pinned list.

SEE ALSO:

Navigation Menu

Record List

Tile Menu

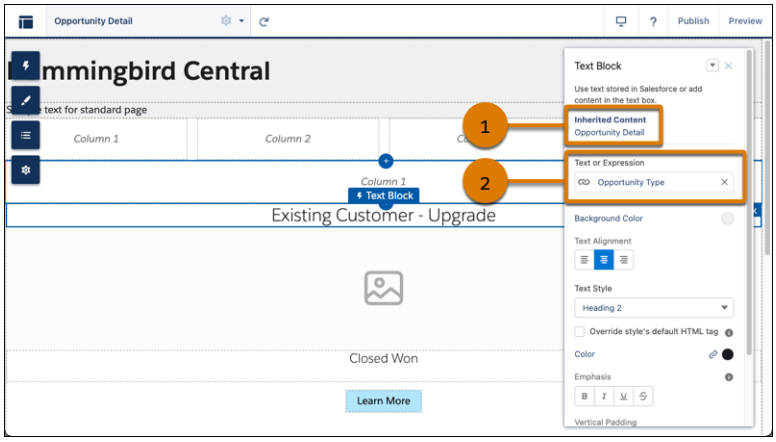
Bind Data to CRM Record Detail Pages in Your LWR Site

Data-bound components used on CRM record detail pages automatically populate with content saved in Salesforce CRM data in records. Map fields in the component property panel to fields in the CRM records.

1. In Experience Builder, navigate to a detail page such as Record Detail, and click **Components**.
2. Drag a component that supports data binding, such as Banner, Card, Grid, Overlap, and Tile, onto the page. In the component property panel, you already have content inherited from the content pages (1).

   Note: The Grid component can be added to any type of site page in addition to Record Detail pages

3. In the component property panel, map the fields in the record to fields in the object detail page (2). You can bind data from any field on the detail page, including custom fields.



To use a component on a detail page without binding content, click the chain link icon next to the data source to unlock the content. Add your own content, or paste in a valid URL in the field to link to static content.

To see data binding in CRM records in action, check out the Did You Know Series (English Only).

SEE ALSO:

Use a Grid Component to Show Enhanced CMS Collections and List Views in LWR Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

USER PERMISSIONS

To customize an LWR site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin, publisher, or builder in that site

Add Salesforce CRM Data to Your Aura Site

Enable your users to do more when you share Salesforce CRM data in your Aura site. Create CRM collections in the Content Management Workspace, and customize how your CRM data appears on your site using Experience Builder.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

Add CRM Connections to Your Aura Site

To share Salesforce CRM data on your Aura site, add CRM connections in Content Management.

Create a Salesforce CRM Collection for Your Aura Site

To display CRM object data on your site, create CRM collections. CRM collections are automatically updated based on the data in your Salesforce org. When you add a CRM collection to your Aura site, you can customize its layout and formatting.

Add a Salesforce CRM Collection to Your Aura Site

To create an attractive and engaging display of CRM object data, add a CRM collection to your Aura site. Create and customize the data layout and record list views by using the CMS Collection component in Experience Builder. If you haven't created a CRM collection but you want to display object data on your site, you can still add the CMS Collection component as a placeholder.

Add CRM Connections to Your Aura Site

To share Salesforce CRM data on your Aura site, add CRM connections in Content Management.

CRM objects must be explicitly approved to make their data available on your site. Objects retain their permissions when used on Experience Cloud Sites.

Note: Only objects that support list views are available. Only fields in global list views can be used for display on your site.

1. In your site's Experience Workspaces, navigate to Content Management.
2. Go to **Content**, and click **Salesforce CRM**.
3. Click **Add CRM Connections**.
4. Select objects to add to your site by clicking +. If an object is already approved and connected to your site, you see a gray checkbox next to the object.
5. Save your changes.
6. To disable existing connections, select **Disable Connection** from the row menu.

To display CRM data on your Aura site, create a CRM collection in Content Management.

SEE ALSO:

Create a Salesforce CRM Collection for Your Aura Site

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To access an Experience Builder site's Content Management workspace:

- Create and Set Up Experiences
- AND is a member of the site

To customize an Experience Builder site:

- Create and Set Up Experiences OR assigned an experience admin, publisher, or builder role in that site
- AND is a member of the site

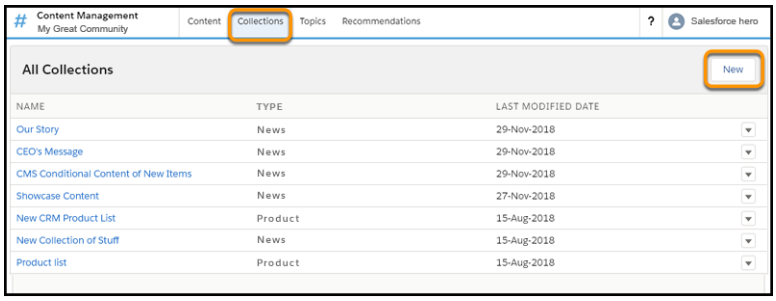
Create a Salesforce CRM Collection for Your Aura Site

To display CRM object data on your site, create CRM collections. CRM collections are automatically updated based on the data in your Salesforce org. When you add a CRM collection to your Aura site, you can customize its layout and formatting.

Before you can create CRM collections, add CRM connections to your Aura site, and ensure that these CRM connections are approved for use.

As you add records in Salesforce, they're automatically added to the CRM collection connected to that object. You can create a CRM collection for an object even if you don't have any records for that object in your org. If you anticipate having records to show on your Aura site, create a CRM Collection.

1. In your site's Experience Workspaces, navigate to Content Management.
2. Go to **Collections**, and click **New**.



3. In the New Collection window, enter a descriptive name for your collection, select **Salesforce CRM**, and click **Next**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

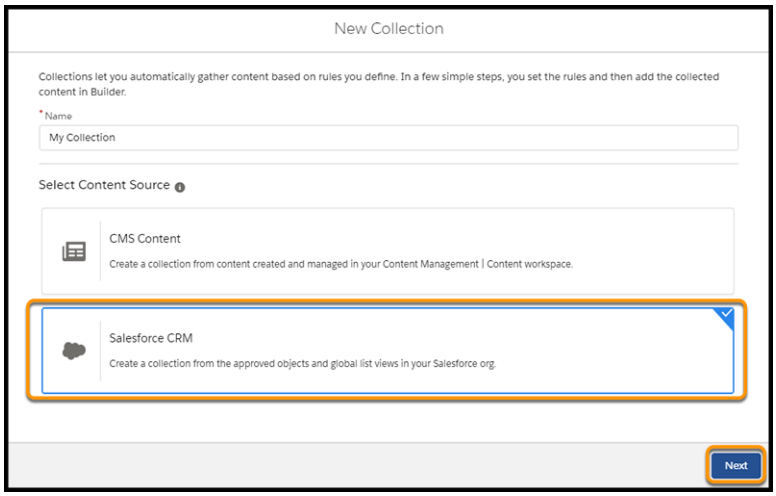
USER PERMISSIONS

To access an Experience Builder site's Content Management workspace:

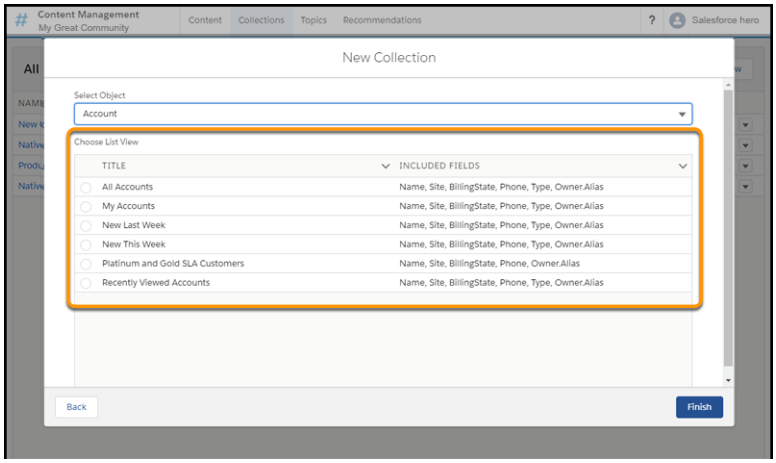
- Create and Set Up Experiences
- AND is a member of the site

To customize an Experience Builder site:

- Create and Set Up Experiences OR assigned an experience admin, publisher, or builder role in that site
- AND is a member of the site



4. From the dropdown menu, select the object that you want to include in your collection.
5. Select the best list view to display your CRM collection. You can have multiple collections associated with an object, but each collection can only have one list view associated with it at a time. Objects with only one list view available can only have one collection at a time.



Only global list views are available for creating CRM collections. All fields in a list view are available for display when that view is added as a content source in Experience Builder.

6. Click **Finish**.

SEE ALSO:

Add a Salesforce CRM Collection to Your Aura Site

Create a Conditional CMS Collection for Your Aura Site

Create a Manual CMS Collection for Your Aura Site

Add a Salesforce CRM Collection to Your Aura Site

To create an attractive and engaging display of CRM object data, add a CRM collection to your Aura site. Create and customize the data layout and record list views by using the CMS Collection component in Experience Builder. If you haven't created a CRM collection but you want to display object data on your site, you can still add the CMS Collection component as a placeholder.

1. In Experience Builder, click **Components**.
2. Drag the **CMS Collection** component onto the page.
3. In the component property panel, click **+ Add Collection**.
4. Select the CRM collection that you want to add from the list, and save your change.

   Tip: The Type column indicates the source of a collection. For example, Account is any collection composed of Account data. A content type such as News or Image indicates a CMS Collection.

5. In the component property panel, customize the collection layout and content layout as needed.

SEE ALSO:

CMS Collection

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To access an Experience Builder site's Content Management workspace:

- Create and Set Up Experiences
- AND is a member of the site

To customize an Experience Builder site:

- Create and Set Up Experiences OR assigned an experience admin, publisher, or builder role in that site
- AND is a member of the site

External Data Sources in Your Experience Cloud Site

Use Salesforce Connect and Salesforce Files Connect to access external data and content stored outside of your Salesforce org from your site.

Provide your site users access to:

- Data that's stored in another Salesforce org, SAP® NetWeaver Gateway, or IBM WebSphere® that your org accesses via Salesforce Connect
- Content that's stored in Google Drive or SharePoint that your org accesses via Files Connect

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Example: Let's say you have a partner community for sales, and you store your product order information in a back-office ERP system. You can surface that information to your sales partners, enabling them to view and update orders within the context of all related data regardless of where it's stored.

Or maybe you store your templates for contracts and other agreements in a non-Salesforce environment. Your sales partners can access the latest versions of that content as needed.

SEE ALSO:

Salesforce Connect

Salesforce Files Connect

Identity Type for External Data Sources

Configure Search Functionality in Experience Cloud Sites

Help your visitors find what they're looking for on your Experience Cloud sites.

Search behavior in Experience Cloud sites is different from searching an org.

- When you search in an Experience Cloud site, you receive results specific to that site. To find items from a different site, site members must leave the current site and search in the other site.
- In site search results, site members can view data that is explicitly shared with them in the site context. Shared content can include internal company content and records that aren't explicitly shared with all site members.
- In Experience Cloud sites, site members can enter terms, filter out, and select multiple topics to help refine their results. If a site member wants to view a complete list of results, they can clear all their filters.

Allow Users to Search LWR Sites

You can set up search pages in sites created with LWR templates so your visitors can search for CRM objects or CMS content published from enhanced CMS workspaces. Visitors can also search for content within the Rich Content Editor and HTML Editor components, as well as within page title metadata.

Allow Users to Search Aura Sites

Search in Aura sites depends on the type of template you use.

Allow Users to Search Salesforce Tabs + Visualforce Sites

Sites using Salesforce Tabs + Visualforce have much of the same functionality as Experience Cloud sites using Aura templates.

Allow Users to Search LWR Sites

You can set up search pages in sites created with LWR templates so your visitors can search for CRM objects or CMS content published from enhanced CMS workspaces. Visitors can also search for content within the Rich Content Editor and HTML Editor components, as well as within page title metadata.

Set up the search capability on LWR sites through LWR components. The Search Bar component displays a field where visitors enter search terms. The Results Layout component displays the search results. Search results can only be shown on a standard Search page, so to use the Results Layout component, you must first create the search page. Visitors can filter and sort the search results, making it easier to find what they need. You can customize the No Results layout and the labels on your search page to complement your company's branding.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

Set Up CMS Content Search in an LWR Site

In enhanced LWR sites, visitors can search for CMS content published from enhanced CMS workspaces. Visitors can also search for content within the Rich Content Editor and HTML Editor components, as well as within page title metadata. Use the Search Bar and Results Layout components to add the search functionality to your enhanced LWR site.

Set Up CRM Object Search in LWR Sites

Set up a CRM search page so your site visitors can search for CRM records, such as cases, accounts, leads, opportunities, and knowledge articles, in LWR sites. Visitors can filter and sort the search results, making it easier to find what they need. You can create and save search configurations to display only the information you need and apply that configuration to multiple sites. You can customize the labels, buttons, background and images of the No Results panel, object navigation panel, and filter panel to compliment your company's brand.

Set Up CMS Content Search in an LWR Site

In enhanced LWR sites, visitors can search for CMS content published from enhanced CMS workspaces. Visitors can also search for content within the Rich Content Editor and HTML Editor components, as well as within page title metadata. Use the Search Bar and Results Layout components to add the search functionality to your enhanced LWR site.

Visitors can search only indexed content, so after you publish fresh content in your site or in the connected CMS workspace, rebuild the index. In Experience Builder, navigate to **Settings | Search**, and then click **Rebuild Index**.

Note: Searches that contain partial keywords don't return search results. However, if a user enters a misspelled word in the Search field, CMS Content Search attempts to correct the word and provides search results for records that contain the corrected words.

Search results can only be shown on a standard Search page, so to use the Results Layout component, you must first create the search page.

1. In Experience Builder, click the Pages menu on the top toolbar, and then click **New Page** at the bottom of the menu.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

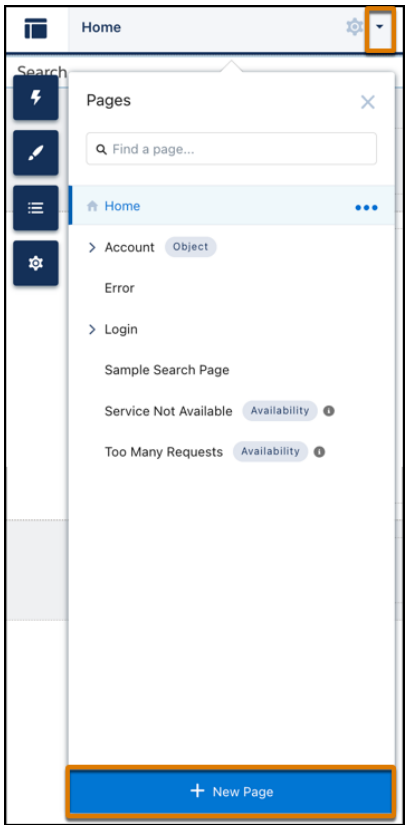
USER PERMISSIONS

To customize an Experience Cloud site:

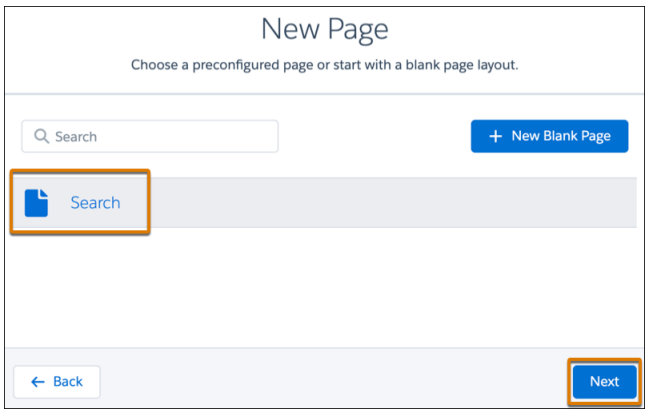
- Be a member of the site AND Create and Set Up Experiences

  OR

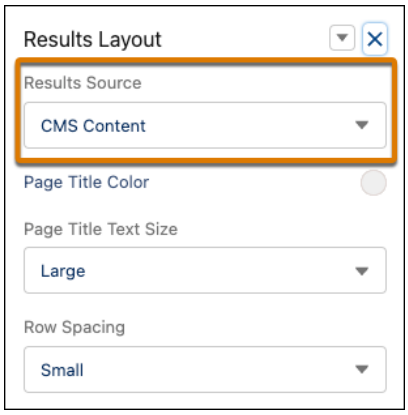
- Be a member of the site AND an experience admin, publisher, or builder in that site



2. Select the **Standard Page** type.
3. Select the preconfigured **Search** page and click **Next**.



4. Enter a name and URL for the page, and then click **Create**.
5. From the Components panel, drag the **Search Bar** component onto the header section of the page. When you add the component to the header section, CMS content search is available across all site pages.
6. To open the properties panel of the Results Layout component, drag the component from the Components panel onto the page, and click the component on the canvas.
7. From the properties panel, make sure the **Results Source** field displays the **CMS Content** option.



8. Preview and publish your site.

Set Up CRM Object Search in LWR Sites

Set up a CRM search page so your site visitors can search for CRM records, such as cases, accounts, leads, opportunities, and knowledge articles, in LWR sites. Visitors can filter and sort the search results, making it easier to find what they need. You can create and save search configurations to display only the information you need and apply that configuration to multiple sites. You can customize the labels, buttons, background and images of the No Results panel, object navigation panel, and filter panel to compliment your company's brand.

Before you use CRM Search, review these limitations.

- Site visitors can search for any object supported by UI API, except Files.
- Filtering isn't supported for all data types.
- For cases, the hover functionality isn't supported for the Subject field.

Note: Searches with partial keywords return records that contain words starting with the characters entered in the Search field. If a user enters a misspelled word in the Search field, CRM Object Search attempts to correct the word and provides search results for records that contain the corrected words.

Create a Search Page

Set up CRM search capabilities through LWR components. Search results can be shown only on a standard Search page, so to use the Results Layout component, you must first create the search page.

1. In Experience Builder, click the Pages menu on the top toolbar, and then click **New Page** at the bottom of the menu.

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

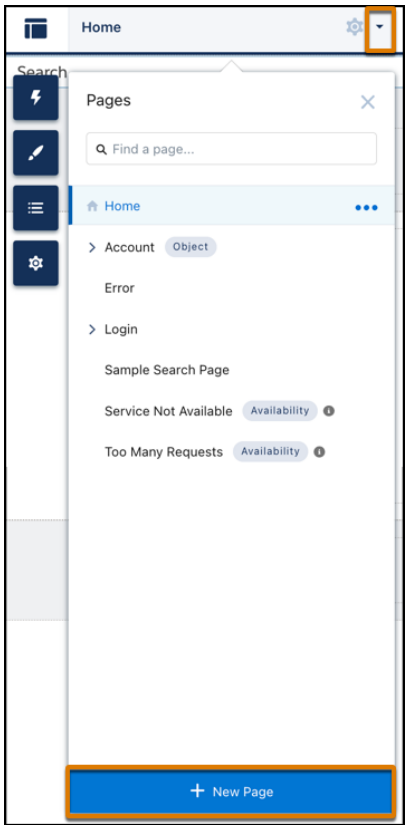
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

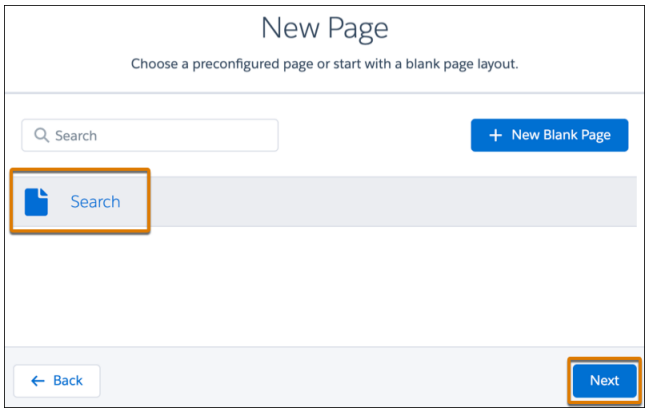
- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site



2. From the New Page dialog, select the **Standard Page** type.
3. Select the preconfigured **Search** page and then click **Next**.



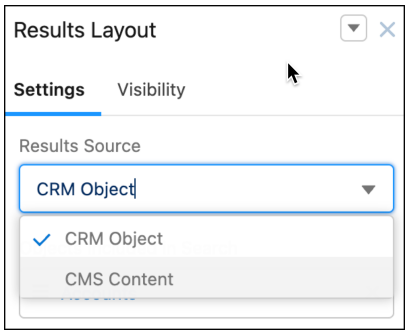
4. Enter a name and URL for the page, and then click **Create**.

Configure the CRM Search Results Page

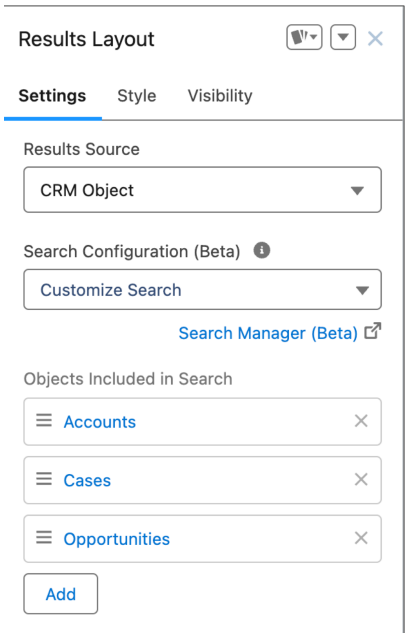
Set up and configure LWR search components to customize how your site is searched. The Search Bar component displays a field where visitors enter search terms. The Results Layout component displays the search results for your site.

1. Go to your site's Search Results page in Experience Builder.

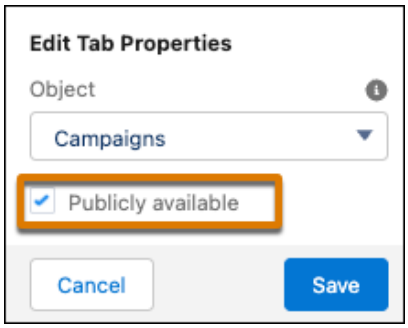
2. From the Components panel, drag the **Search Bar** component onto the header section of the page.
   When you add the component to the header section, CRM search is available across all site pages.
3. Drag the **Results Layout** component from the Components panel onto the page. To open the component's properties panel, select the component on the canvas.
4. From the properties panel, click **Results Source**, and then select **CRM Object**.



5. To update the existing search configuration for the site you are on, click **Search Configuration (Beta)** and then select **Customize Search** from the dropdown menu.
   When you select Customize Search, you can update the current search configuration for the site you are on. The dropdown also displays saved search configurations that can be applied to your site.
6. To add objects to the existing search configuration, in the **Objects Included in Search** section, click **Add**.
   The Accounts object is automatically included in Search.



7. To make an object searchable by guest users, click the object to open the Edit Tab Properties menu. Select the **Publicly available** checkbox, and save your changes.



8. The order that objects are listed in under Objects Included in Search is how they appear in the left navigation panel on the search page. Drag objects up or down to arrange them in the order that you want them to appear.
9. To remove an object from the Search Results layout, click the **X** on an object tile.
10. Set up an object detail page for each object that you added to the search results layout.

    See Create Custom Pages with Experience Builder.
11. Select the object detail page from Pages, then drag the **Record Detail (Beta)** component onto the page.

    This component displays a Salesforce object's record information on the object page.
12. To update the fields that appear in the Search Layout of the object:
    a. Go to Setup, and in the Quick Find box of Object Manager enter the object name.
    b. Select the object and then select **Search Layouts**.
    c. Click the down arrow next to the site name and click **Edit**.

To ensure that guest users can view CRM Object search results, check these settings.

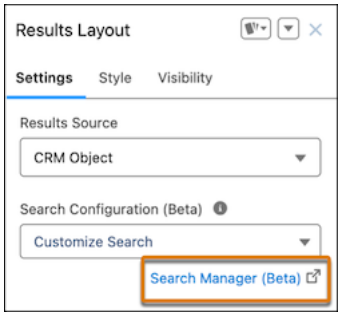
- In **Workspaces** > **Administration** > **Preferences**, select **Allow guest users to access public APIs**.
- In Experience Builder, grant read access to the guest user profile for each applicable object. See Configure the Guest User Profile.
- Create a sharing rule for each object record that you want to share with your users.

Create and Save Search Configurations

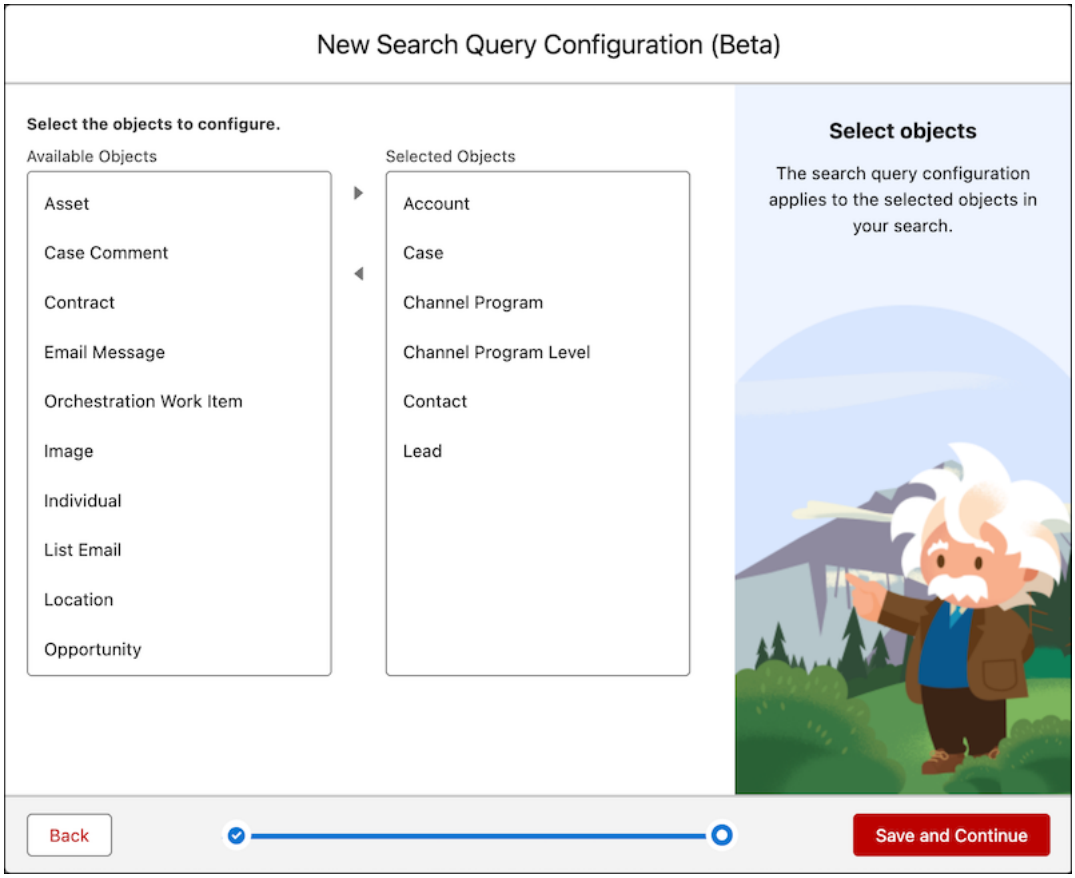
To make search results from LWR sites more relevant to your site, create a search configuration in Search Manager. You can filter out fields that you don't need. After you save your configuration, it can be applied to multiple sites, simplifying the process of creating search configurations.

1. To create a search configuration that can be applied to multiple sites, click **Search Manager (Beta)**.

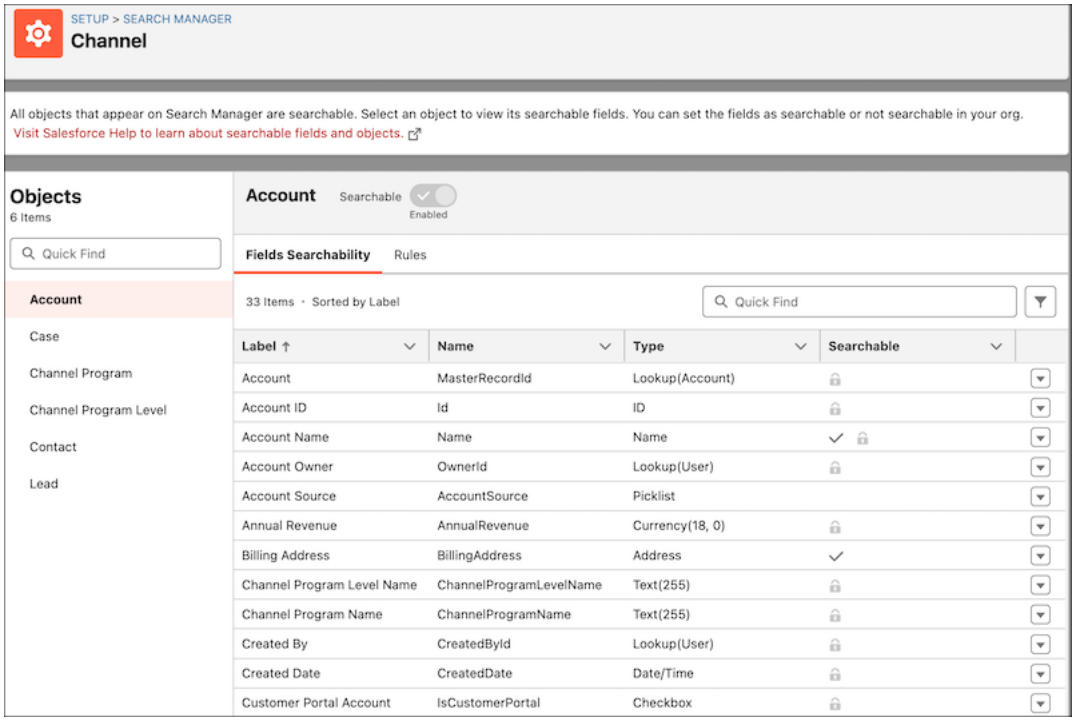
   Salesforce redirects you to the Search Manager configuration page.



2. In the Search Configuration section, click **New (Beta)**
3. Create a name for your search configuration and then select the **LWR Experience Sites** channel. Click **Continue**.
4. From the New Search Query Configuration box, move the objects to include in your search from the Available Objects panel to the Selected Objects Panel. Click **Save and Continue**.



5. To designate which fields are searchable, click the object and then select the **Field Searchability** tab.

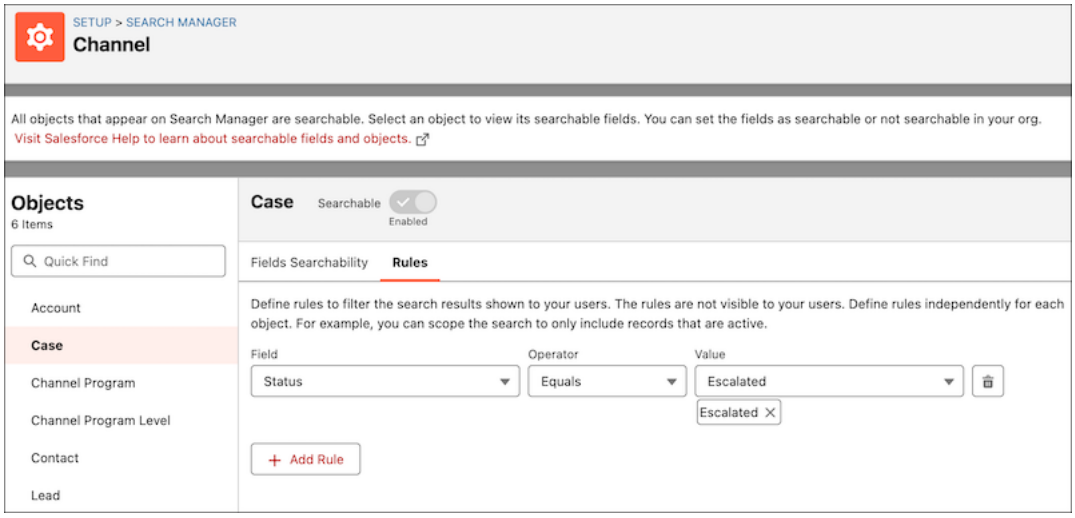


6. To exclude a field from Search, click the down arrow and select **Exclude from Search**.

   Fields with a lock next to them can't be excluded from Search.

7. To control which field values appear in your search, select the **Rules** tab. Select the field you want to filter on and the criteria it must meet to be included in your search.

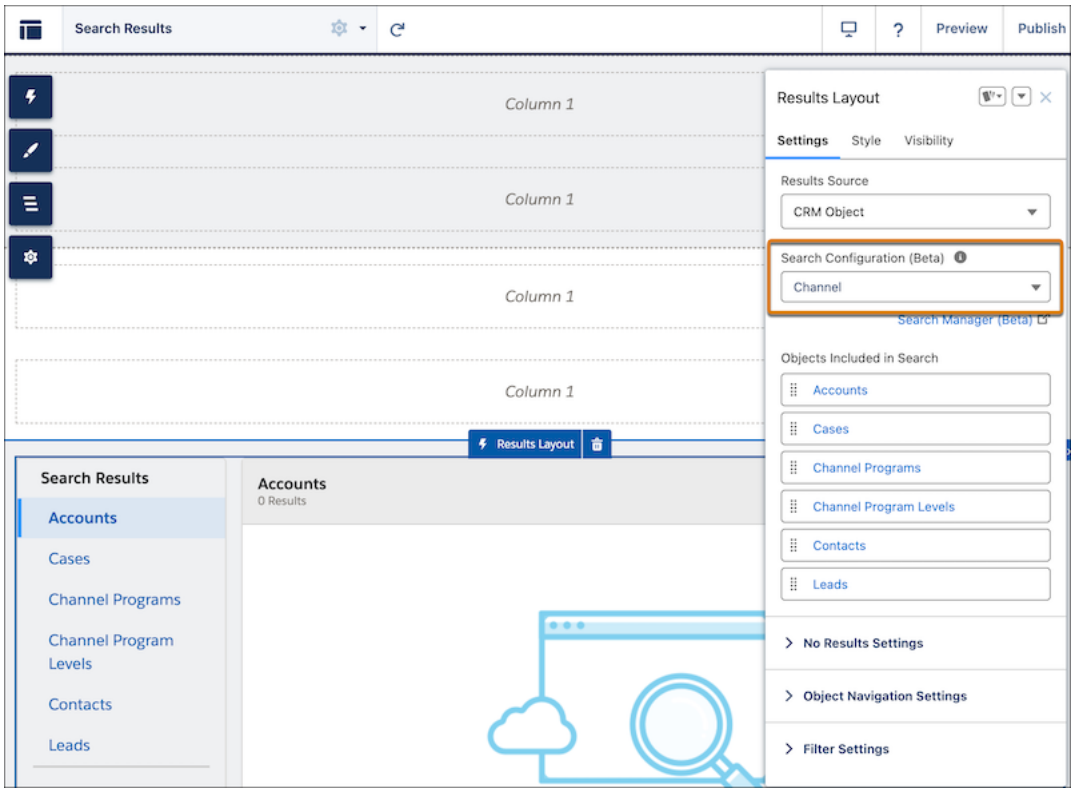
   For example, if you only want escalated cases to appear in your search, select the Case object and create a rule where Status equals Escalated.



8. Save your configuration.

After you save the configuration, it appears in the dropdown menu of Search Configuration (Beta) in the Results Layout properties panel and can be applied across multiple sites.

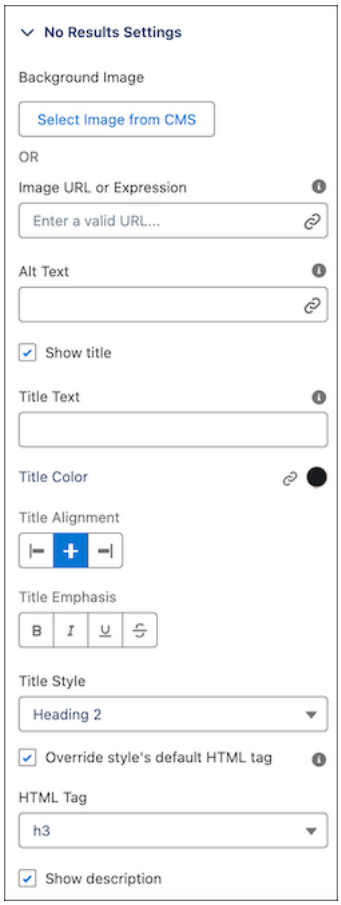
When you apply a saved configuration to your sites, the objects added automatically appear in your new site.



Customize the Branding of the Search Results Page

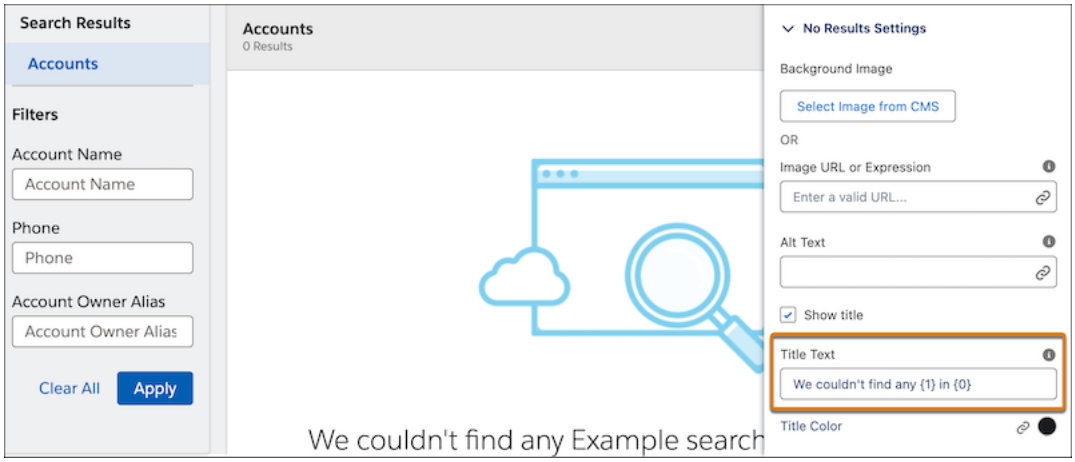
Customize the branding of the Object Navigation panel, the No Results page, and Filters. You can customize the text, buttons, background, and images to fit your company's brand.

1. To format the page that appears when a visitor's search doesn't return any results, expand the **No results settings** section. You can upload a branded image to replace the default image and customize the page title and description.



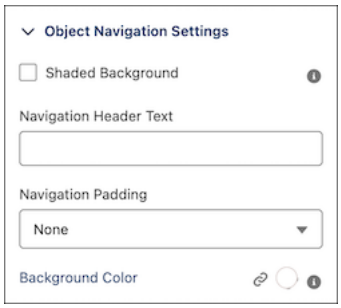
2. To include the user's search term and the selected object in the title text of the No Results page, use dynamic field values.
   - To include the search term, enter `{1}` in the title.
   - To include the object that is selected, enter `{0}` in the title.

   For example, if your title text is `We couldn't find any results for {1} in {0}`, and the visitor entered `Oranges` while searching the Account object, then the No Results text is **We couldn't find any results for Oranges in Accounts**.

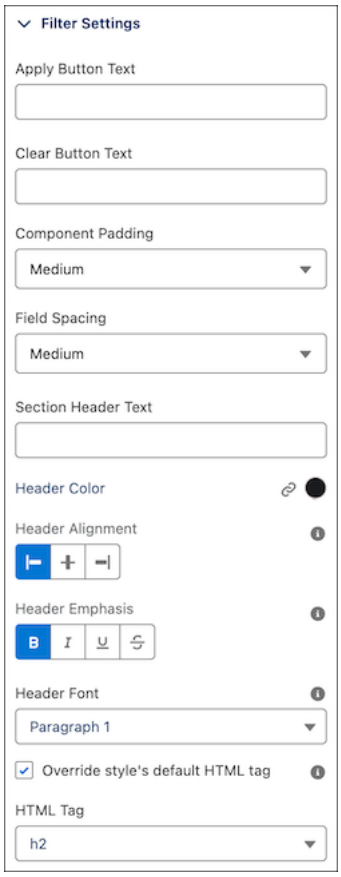


3. To customize the background, text, and padding of the Object Navigation panel, expand **Object Navigation Settings** in the Results Layout properties panel.

   The Object Navigation Settings section is only available on desktop.



4. To customize Filter settings, buttons, texts, and branding, expand **Filter Settings** in the Results Layout properties panel.



5. Preview and publish your site.

Allow Users to Search Aura Sites

Search in Aura sites depends on the type of template you use.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

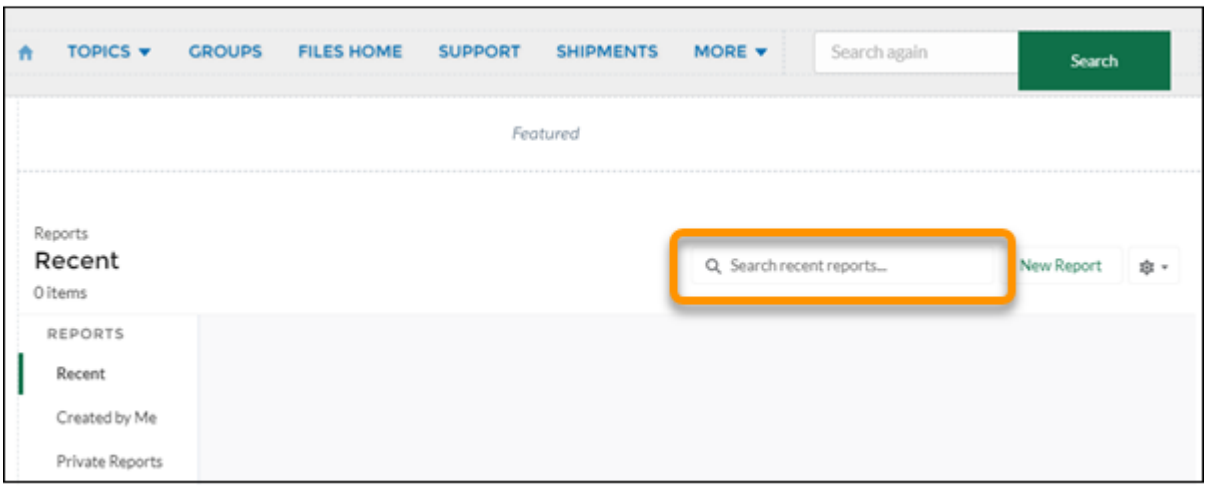
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Searching for Objects in Experience Cloud Aura Sites

Objects must be searchable in Lightning Experience and supported in templates to be searchable in Experience Cloud sites.

In addition to being marked as searchable, more setup is required to make objects discoverable for guest users. For more information, see Enable Search Autocomplete for Guest Users.

Enable search filters to make an object in the internal org searchable in your site. To make custom objects searchable, the object must be related to a tab in the internal org.



Filtering Search Results in Aura Sites

Experience Cloud Aura site users can filter their search results for Accounts, Cases, Contacts, Dashboards, Files, Knowledge, Leads, Opportunities, People, and Tasks. Search filtering for sites is on by default. To add search filters to the Search Filter layout, enter Search Layouts in the Object Manager search box and select the object that you want to add a filter to. Add the fields that users want to filter to the Search Results layout. Supported field types are checkbox, phone number, picklist, text, and URL. You can't filter encrypted fields.

To enable topic filters, site admins must turn on **Allow topic filtering for Lightning Knowledge search results**. You can find this site preference on the Administration page of your site's Experience Workspace. For more information, see Access Experience Workspaces.

To increase search performance, enable Einstein Search for Knowledge. Admins can add more topics for search to filter. They can add more topics in Content Management and include articles to that topic, which advances search when site members filter out more topics. Keep in mind, guest user knowledge searches return results for article titles only. The body of the article isn't searched.

Search results include all the records and files that a site member has access to, such as:

- Files that they own or are shared with them directly.
- Files they can access from a library.
- Files associated with records they have access to.
- Files shared with groups or sites they're members of.

Troubleshooting Global Search on Aura Sites

Global search looks for records in the internal org, which has a different network ID than the site. Users created through the contact record of a site are assigned to the site's unique network ID. If you're searching for a site user with global search, you get the user associated with the global network ID instead of the site's network ID. To avoid getting results you don't want, create User records in the internal org, and then associate the records to your site. Link the internal record to a Contact record to associate the record to your site. After you link both records, you can find the User record through global search and the User record's network ID is now associated with the internal org.

Searching the Customer Service Template in Aura

Keep the following in mind when searching the Customer Service template in Aura:

- The Search Results component only shows search results from articles and discussions.
- Articles must be associated with a topic in Topic Management to surface in the Search Results component.
- The Global Search Results component allows site members to see search results. Results can also be shown on separate tabs for Accounts, Cases, Contacts, Feeds (discussions), custom objects, and any other object that's exposed in the site.
- You must associate a tab to a custom object to make it searchable in global search.
- The Search & Post Publisher component gives you the option to set up autocomplete search results. These suggested search results are based on the objects made searchable in the site, and included in autocomplete search.

Set Up Search Pages for Aura Sites

In Experience Cloud sites created with Aura templates, use the Global Search Box and Global Search Results components to create a search page for your visitors.

Enable Search Autocomplete for Guest Users

Sometimes you want your Experience Cloud site's guest users to benefit from the suggestions that come from autocomplete on their search terms. To make it happen, you must explicitly make result types publicly available. For example, when you want guest users to see suggestions for Knowledge articles, you can set up your search component so that Knowledge results are public. After you set up autocomplete, search shows any Knowledge articles that match a guest user's search terms in autocomplete suggestions.

Add the Global Search Box to Your Customized Experience Cloud Site HTML Header

If you customize your Experience Coud sites with an HTML header, you hide the global search box. To take advantage of this search functionality, add a form to your custom header.

Set Up Search Pages for Aura Sites

In Experience Cloud sites created with Aura templates, use the Global Search Box and Global Search Results components to create a search page for your visitors.

SEE ALSO:

Global Search Box

Global Search Results

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Enable Search Autocomplete for Guest Users

Sometimes you want your Experience Cloud site's guest users to benefit from the suggestions that come from autocomplete on their search terms. To make it happen, you must explicitly make result types publicly available. For example, when you want guest users to see suggestions for Knowledge articles, you can set up your search component so that Knowledge results are public. After you set up autocomplete, search shows any Knowledge articles that match a guest user's search terms in autocomplete suggestions.

USER PERMISSIONS

To configure component properties:

- Customize Application

1. In Experience Builder, click a search component.

   Autocomplete properties are available on most search components.

2. In the search component property editor, open the Autocomplete section and click an object.

   The object that you click is an object type that you want to make visible to guest users in search results. When you click an object, a window opens where you can select a different object type. So keep your original selection, or change it here.

3. Select **Publicly available**.
4. Click **Save**.

Add the Global Search Box to Your Customized Experience Cloud Site HTML Header

If you customize your Experience Coud sites with an HTML header, you hide the global search box. To take advantage of this search functionality, add a form to your custom header.

You can add the global search box to both Experience Builder and Salesforce Tabs + Visualforce sites.

Note: You are automatically redirected to a Classic UI, when configuring this feature in an Experience Builder site.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. In your customized HTML header, embed a form similar to this one.

```
<form action="/<site name>/search/SmartSearch" method="get">
  <input id="phSearchInput" type="text" name="str"/>
  <input type="submit" value="Search"/>
</form>
```

2. Replace `<site name>` with the unique value you used for the URL when creating the Experience Cloud site.

   For example, if you entered `customers` as the unique value for your site URL, the form would look like this example:

```
<form action="/customers/search/SmartSearch" method="get">
  <input id="phSearchInput" type="text" name="str"/>
  <input type="submit" value="Search"/>
</form>
```

With global search from your internal org, you can get uneven results when searching for an Experience Cloud site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

Allow Users to Search Salesforce Tabs + Visualforce Sites

Sites using Salesforce Tabs + Visualforce have much of the same functionality as Experience Cloud sites using Aura templates.

There are a few additional things to consider if you're using a Salesforce Tabs + Visualforce site:

- If Chatter is enabled, global search and contextual feed search are enabled by default in all sites.
- With global search, members can search for records, files, people, groups, topics, feed posts, and comments.
- Feed search () is helpful when members want to look for information in a specific feed context. Groups, user profiles, records, and the site feed support feed search.
- If Chatter isn't enabled, sidebar search is enabled in all Salesforce Tabs + Visualforce sites.
- Sidebar search doesn't support searches for items specific to Chatter, such as feeds, groups, files, topics, and user profiles.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Create a Branded Mobile App for Your Experience Cloud Site Using Mobile Publisher

Use Salesforce Mobile Publisher to create and distribute a fully branded mobile app for your Aura and LWR sites.

Note: Mobile Publisher for LWR sites is a Beta Service. Customer may opt to try such Beta Service in its sole discretion. Any use of the Beta Service is subject to the applicable Beta Services Terms provided at Agreements and Terms.

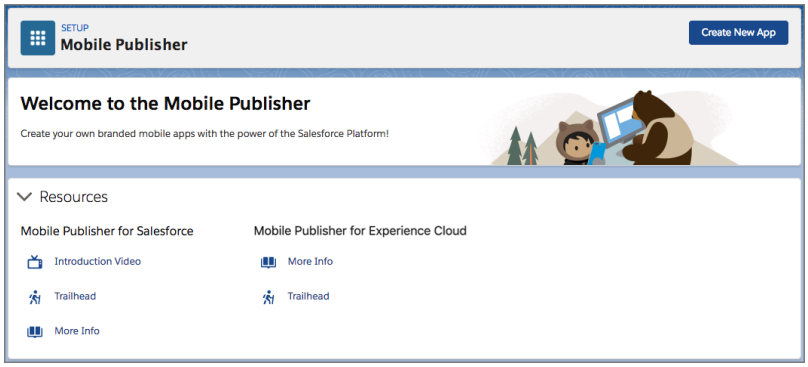
Mobile Publisher is a powerful tool to create a mobile app from your Experience Cloud site.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites



Note: Your organization must purchase licenses for Salesforce Mobile Publisher to use the feature. Contact your Salesforce account executive for more information.

With Mobile Publisher for Experience Cloud, you can add the following native features to your branded mobile app:

- Persistent authentication.
- Biometric unlock.
- Integrated barcode reader.
- Geolocation.
- Contacts stored on a mobile device.
- Integration with Apple Wallet on iOS.
- Bottom tab bar navigation.
- And many more features. Refer to the Mobile Publisher documentation.

Salesforce then publishes the app to the Google Play and Apple App stores. After the app is published, any update to your Experience Cloud site is automatically reflected in the app without the need to republish.

Learn more about Mobile Publisher, the assets you need for your branded app, and how to distribute your mobile app to your users.

Lightning Bolt for Salesforce: Build Once, Then Distribute and Reuse

Lightning Bolt for Salesforce lets you quickly build and distribute industry-specific Lightning Bolt Solutions to jump-start new org capabilities. Save time by building once and then reusing. Whether it's for your own org or you're a consulting partner or ISV, you can reduce the time required to implement solutions and cut development costs.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

A Lightning Bolt Solution is a portable package that's packed with power. It can combine custom Lightning apps, business process flows, and Experience Builder templates and pages in an easy-to-build and distributable form. Use a Lightning Bolt Solution to share or sell a solution on AppExchange, implement an Experience Builder site with a turnkey solution or new look, or configure automation. You can publish apps or flows without an Experience Builder template or include one when you want to apply your brand.

A Lightning Bolt Solution combines one or more of the following:

- Customized Experience Builder templates—A template includes a theme layout and CSS, along with pages, content layouts, and Lightning components. Alternatively, instead of a full template, you can also export a single Experience Builder page with its content layout and components.
- Flow categories—A flow category contains one or more flows, making it easy to group flows for related business processes.
- Custom apps—Adding customized apps lets you create solutions tailored to your industry.

Lightning Bolt Solutions are flexible, so you can take advantage of them in many ways. Here are just a few examples.

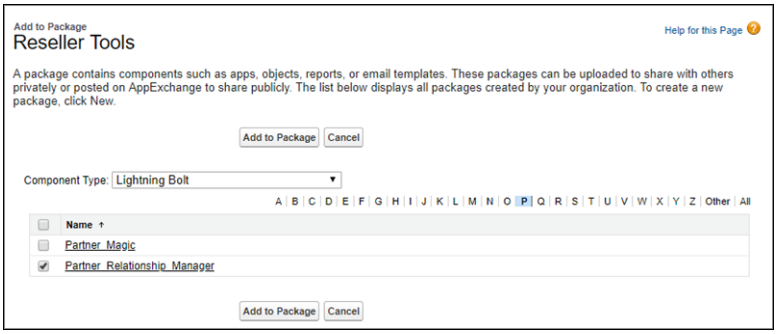
Example: You've customized the Partner Central template to create an Experience Builder site with features that meet your particular business needs. You want to create several similar partner sites, but you don't want to build each one from scratch. By exporting your customized template, you can reuse it and build as many branded sites as you need.

Example: You're a consulting partner who specializes in creating solutions for the real estate industry. Your solutions feature a unique look, custom apps for finding mortgages, and automation that alerts sales people of properties with active prospects. With a Lightning Bolt Solution, you can create and export your solution in a way that's easy to use. After you install your Lightning Bolt Solution in the customer's org, you can further customize it to suit their needs. By building the bulk of the solution in your org and then distributing it to your customers, you can rapidly launch new solutions.

Example: You're an ISV who builds a custom insurance agent app. The app includes automation to create coverage estimates and automatically notify customers of the results. Using a Lightning Bolt Solution, you can easily bundle your app and business process flows into a single package. Distribute the package to your customers to install in their Salesforce orgs, or market the solution on AppExchange.

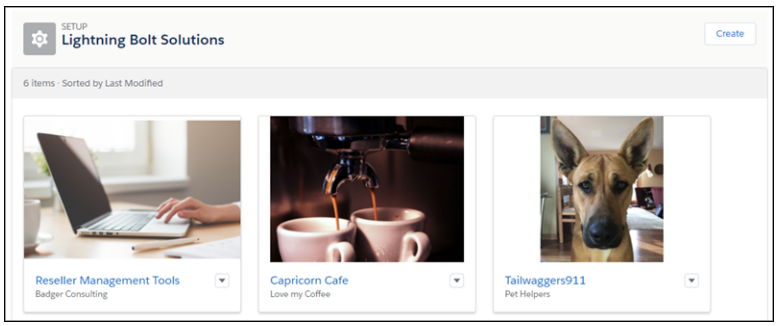
Package and Distribute Your Solution

You can package and distribute solutions to use in other orgs and sites. After you create and upload a package, share the link privately with your clients, customers, or partners. Alternatively, publish your custom Lightning Bolt Solution as a managed package in AppExchange. Market your solution with an AppExchange listing in the same way that you list any other app, component, or consulting service. Describe your solution, pricing, support, and other details so that customers can determine whether your offering is right for them.



Reuse Your Own Solution

When you create a solution, it appears in the list of Lightning Bolt Solutions in your org. You can use it to build new Experience Builder sites or enhance an existing one.



Create a Lightning Bolt Solution

Have at least one Experience Builder template, custom app, or flow category that you want to distribute? Then you're ready to create a Lightning Bolt Solution. With Lightning Bolt Solutions, you can combine custom Lightning apps, business process flows, and Experience Builder templates and pages in easy-to-build, distributable packages.

Export a Customized Experience Builder Template for a Lightning Bolt Solution

You can customize and export an Experience Builder template to use as a base for creating Experience Builder sites. Create custom pages, layouts, and components. Export and package the template on its own or distribute it for others to use as a part of a Lightning Bolt Solution.

Export a Customized Experience Builder Theme for a Lightning Bolt Solution

Export themes that you've customized and use them in your own Experience Builder sites, or package and distribute them for others to use.

Export a Customized Experience Builder Page for a Lightning Bolt Solution

Export pages that you've customized in an Experience Builder site. Use them as a base for new pages, or package and distribute them for others to use in their sites.

Add Flows to a Lightning Bolt Solution

When you want to add flows to a Lightning Bolt Solution, group them into a flow category. Then add one or more flow categories to your solution.

Export and Packaging Considerations for Lightning Bolt Solutions

Before you export and package a Lightning Bolt Solution, keep the following considerations and limitations in mind.

Requirements for Distributing Lightning Bolt Solutions

Before Salesforce can recognize a Lightning Bolt Solution that's ready for distribution on AppExchange, your solution must meet certain requirements.

Package and Distribute a Lightning Bolt Solution

After you create a Lightning Bolt Solution, package the solution to distribute it to other users or orgs. You can upload the package to AppExchange to share or sell your solution.

SEE ALSO:

Salesforce Partner Community: Lightning Bolt for Partners

Lightning Aura Components Developer Guide

Experience Cloud Developer Guide

Security Developer Center

Second-Generation Managed Packaging Developer Guide: Second-Generation Managed Packages

Create a Lightning Bolt Solution

Have at least one Experience Builder template, custom app, or flow category that you want to distribute? Then you're ready to create a Lightning Bolt Solution. With Lightning Bolt Solutions, you can combine custom Lightning apps, business process flows, and Experience Builder templates and pages in easy-to-build, distributable packages.

Including an Experience Builder template in your Lightning Bolt Solution is optional. Use any template as a base to build your custom site with standard pages and components, or create custom pages, layouts, and components of your own. After you finish customizing the template, export it or one of its pages from **Settings** > **Developer** in Experience Builder.

To include flows, first create a flow category, and add the active flows that you want to export.

1. From Setup, enter `Lightning Bolt Solutions` in the Quick Find box, and select **Lightning Bolt Solutions**.
2. On the Details and Branding page, enter information about your solution. For example, enter your company and solution names, and list the solution's key features. Click **Next**.
3. On the Solution Highlights page, add any combination of Experience Builder templates, flow categories, and custom apps. Click **Next**.
4. Review the Summary page, and click **Finish**.
   The new Lightning Bolt Solutions is now ready for distribution.

SEE ALSO:

Add Flows to a Lightning Bolt Solution

Export a Customized Experience Builder Template for a Lightning Bolt Solution

Export a Customized Experience Builder Page for a Lightning Bolt Solution

Package and Distribute a Lightning Bolt Solution

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create a flow category:
- Customize Application

To create a Lightning Experience Builder template:
- Customize Application AND Create and Set Up Experiences AND View Setup and Configuration

To create a Lightning Bolt Solution:
- Customize Application AND View Setup and Configuration

Export a Customized Experience Builder Template for a Lightning Bolt Solution

USER PERMISSIONS

To create an Experience Cloud site:	Create and Set Up Experiences AND View Setup and Configuration
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site
To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

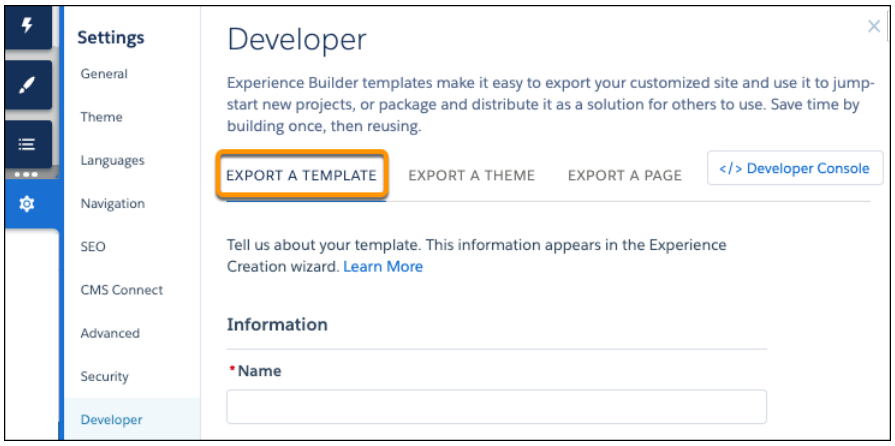
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

	• Be a member of the site AND an experience admin or publisher in that site
To create a Lightning Experience Builder template, theme, or page:	Customize Application AND Create and Set Up Experiences AND View Setup and Configuration
To create a Lightning Bolt Solution:	Customize Application AND View Setup and Configuration

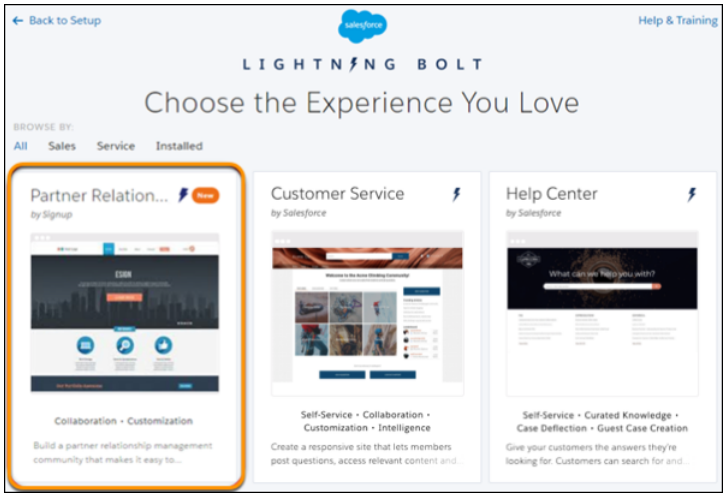
You can customize and export an Experience Builder template to use as a base for creating Experience Builder sites. Create custom pages, layouts, and components. Export and package the template on its own or distribute it for others to use as a part of a Lightning Bolt Solution.

Note: If your customized template isn't based on the latest version, you can't export it until you update the template.

1. In Experience Builder, select **Settings** > **Developer**, and click **Export a Template**.
   The information that you add on this page appears in the Experience Creation wizard and helps others understand your template's purpose and benefits.



2. Add a unique template name, a publisher name, and select a category.
3. Add at least one image as the thumbnail image. The recommended image dimensions are 1260 x 820 pixels.
   You can add two more images that appear in the detailed description of the template.
4. Enter a summary that describes the purpose of the template.
5. Enter at least one key feature.
   The feature titles appear under the thumbnail in the Experience Creation wizard. The feature descriptions appear in the solution's detailed description.
6. Click **Export**.
   After you export the template, it appears in the Experience Creation wizard in your org. You can then use it as a base for building new Experience Builder sites. If you package the template in a Lightning Bolt Solution and install it in another org, it appears in that org's Experience Creation wizard.



7. To distribute the template, create a managed package. Or, add the template to a Lightning Bolt Solution, and include it in the package.

To delete an exported or imported template, from Setup, in the Quick Find box, enter `Digital Experiences`, and then click **Templates**.

Note:

- If you create an Experience Builder site in your org that's based on an imported or exported template, you can't delete the template.
- If you include object pages in a custom template, you can't delete the object from your org unless you remove the template's object pages.
- If you add subpages to an Experience Builder site in your org and export the template, the new site doesn't have the same page hierarchy as the original. All pages in the exported site are found at the top level.

SEE ALSO:

Export and Packaging Considerations for Lightning Bolt Solutions

Second-Generation Managed Packaging Developer Guide: Second-Generation Managed Packages

First-Generation Managed Packaging Developer Guide: Create and Upload a Managed Package

Export a Customized Experience Builder Theme for a Lightning Bolt Solution

USER PERMISSIONS	
To create an Experience Cloud site:	Create and Set Up Experiences AND View Setup and Configuration
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

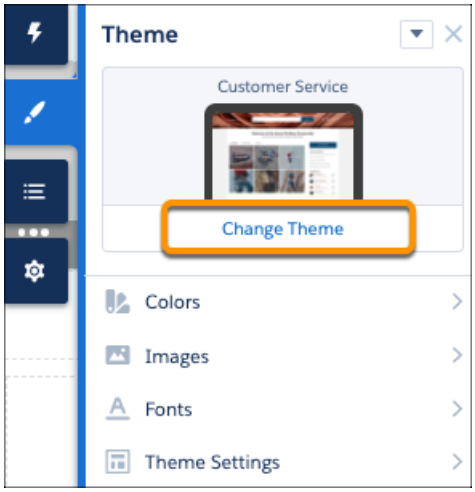
EDITIONS
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND an experience admin or publisher in that site
To create a Lightning Experience Builder template, theme, or page:	Customize Application AND Create and Set Up Experiences AND View Setup and Configuration
To create a Lightning Bolt Solution:	Customize Application AND View Setup and Configuration

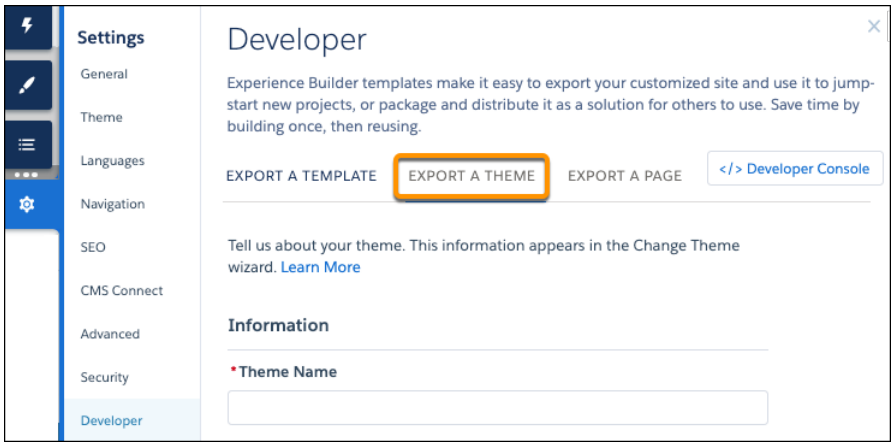
Export themes that you've customized and use them in your own Experience Builder sites, or package and distribute them for others to use.

Note: If your customized theme isn't based on the latest template version, you can't export it until you update the template.

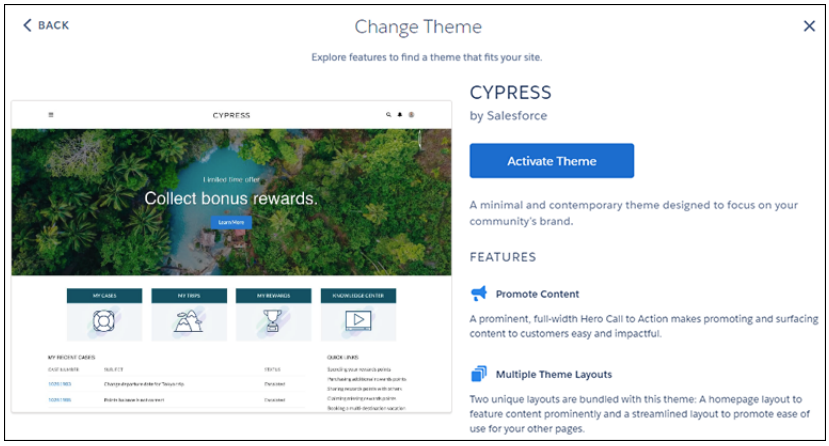
1. In Experience Builder, change to the theme you want to export if that isn't your active theme.



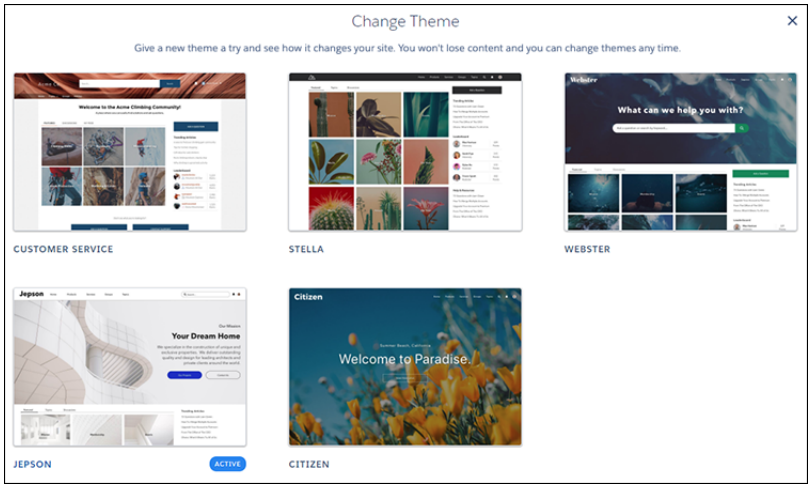
2. Select **Settings** > **Developer**, and click **Export a Theme**.



3. Fill in the form with the needed elements for the Change Theme detail page. Clear information and images help you and others understand what is in the theme and how it works.



4. Click **Export**.
   After you export a theme, it appears in the Change Theme dialog box in all the Experience Builder sites in your org. If you package the theme and install it in another org, it appears in that org's Change Theme dialog box. Themes are ordered by how new they are, so a newly imported theme appears at the beginning of the list.



5. To distribute your theme, create a managed package. Or add the theme to a Lightning Bolt Solution, and include it in the package.

To delete an imported or exported theme, from Setup, enter `Digital Experiences` in the Quick Find box, and click **Themes**.

Note: If an Experience Builder site in your org is using the theme, you can't delete the theme until you switch to a different one.

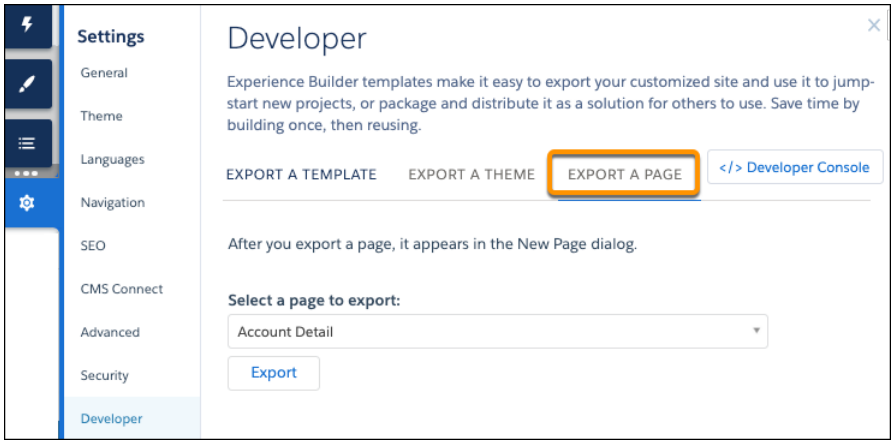
Export a Customized Experience Builder Page for a Lightning Bolt Solution

USER PERMISSIONS	
To create an Experience Cloud site:	Create and Set Up Experiences AND View Setup and Configuration
To customize an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site
To publish an Experience Cloud site:	• Be a member of the site AND Create and Set Up Experiences OR • Be a member of the site AND an experience admin or publisher in that site
To create a Lightning Experience Builder template, theme, or page:	Customize Application AND Create and Set Up Experiences AND View Setup and Configuration
To create a Lightning Bolt Solution:	Customize Application AND View Setup and Configuration

EDITIONS
Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

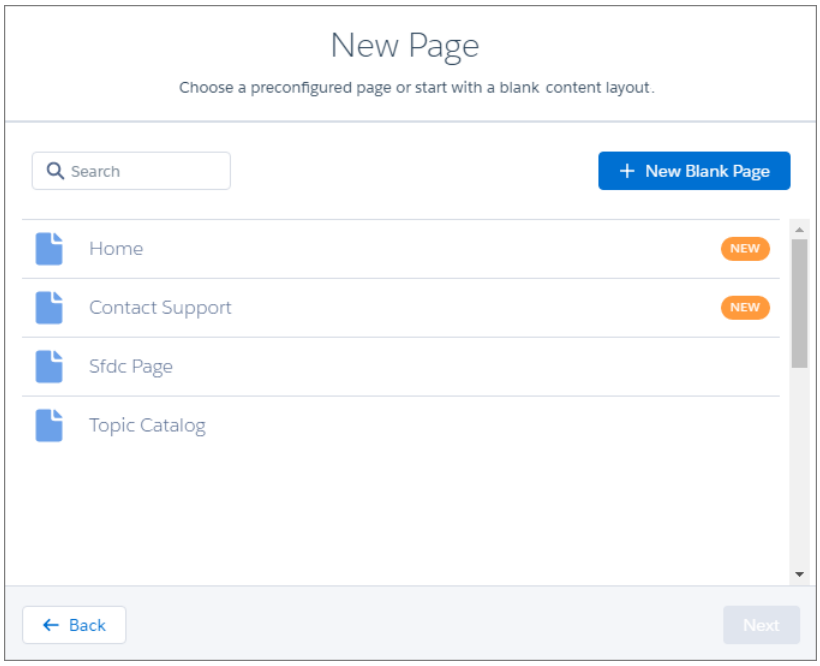
Export pages that you've customized in an Experience Builder site. Use them as a base for new pages, or package and distribute them for others to use in their sites.

1. In Experience Builder, select **Settings** > **Developer**, and click **Export a Page**.



2. Select the page to export.

3. Click **Export**.
   After you export a page, it appears in the New Page dialog box in all the Experience Builder sites in your org. If you package the page and install it in another org, it appears in that org's New Page dialog box. A newly installed page is highlighted as New for 30 days.



4. To distribute your page, create a managed package that includes the page. Or add the page to a Lightning Bolt Solution, and include it in the package.

   Note: You can quickly get to the Package page of Salesforce Setup by selecting **Package the Experience Builder page** in the export page success message.

To delete an exported or imported page, from Setup, in the Quick Find box, enter `Digital Experiences`, and click **Pages**.

Existing pages in Experience Builder that are based on the deleted page are unaffected. However, deleted pages no longer appear in the New Page dialog.

SEE ALSO:

Export and Packaging Considerations for Lightning Bolt Solutions

First-Generation Managed Packaging Developer Guide: Create and Upload a Managed Package

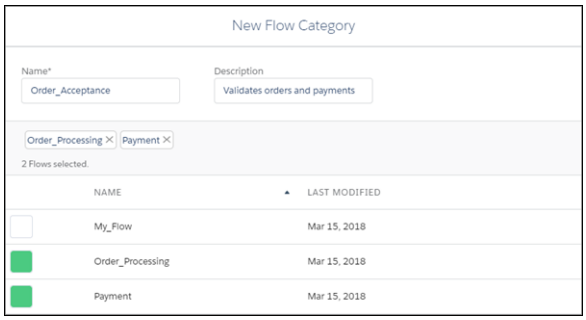
Add Flows to a Lightning Bolt Solution

When you want to add flows to a Lightning Bolt Solution, group them into a flow category. Then add one or more flow categories to your solution.

You can use a Lightning Bolt Solution to publish a turnkey solution on AppExchange, implement a site with a complete solution or new look, or reuse automated processes that use flows.

You can only add active flows to a flow category.

1. From Setup, enter `Flow Category` in the Quick Find box, and select **Flow Category**.
2. Click **New Flow Category**.
3. Enter your developer name and a description. For the name, only alphanumeric characters and underscores are valid.
4. Choose flows from the list of active flows.



5. Save the flow category.
6. Add the flow category and any custom Lightning apps, Experience Builder templates, or other flow categories that you want to export to a Lightning Bolt Solution.
7. Package the solution to distribute in your orgs or in AppExchange.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create a flow category:
- Customize Application

To create a Lightning Bolt Solution without an Experience Builder template:
- Customize Application AND View Setup and Configuration

To create a Lightning Bolt Solution with an Experience Builder template:
- Customize Application AND Create and Set Up Experiences AND View Setup and Configuration

SEE ALSO:

Flow Builder Tour

Export and Packaging Considerations for Lightning Bolt Solutions

Before you export and package a Lightning Bolt Solution, keep the following considerations and limitations in mind.

Tip: We recommend using managed packages to avoid naming conflicts with other packages in your customer's org or your own.

Add Custom Apps

- When you include apps in a Lightning Bolt Solution, follow general guidelines in the Components in Managed Packages for developing and distributing Lightning apps.
- When you package the solution, app components are automatically added to the package. For example, the package includes customized fields, page layouts, and relationships with standard objects.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Add Flows

- To reuse a single flow or a group of flows, add them to a flow category. Then include the flow category in your Lightning Bolt Solution.
- You can add only active flows to a flow category.

Export and Package an Experience Builder Template

- An exported template name must be unique.
- You can export a customized template from Experience Builder and include it in a Lightning Bolt Solution, but including a template isn't required.
- When you export a template from Experience Builder, the system removes non-alphanumeric characters from template and page names. For example, My Template #2 becomes My_Template_2.
- For navigation menu items that link to objects, list views are reset to the default list view. Also, custom list views for standard objects aren't included as dependencies, although custom list views for custom objects are included.
- Only the following Administration settings in Experience Workspaces are included.
  - Change password page
  - Forgot password page
  - Home page
  - Login page
  - **Allow employees to log in directly to an Experience Cloud site** option
- The following items aren't included when you export an Experience Builder template. After you import the template and use it to create an Experience Builder site in the destination org, you must manually reconfigure these items.
  - Most Administration settings (except for the settings already listed).
  - Experience Builder settings, including head markup and the Google Tracking ID.
  - Custom theme layout components that aren't listed in **Settings** > **Theme** > **Configure** aren't included. For theme layout components to be included, you don't have to assign them to a page.
  - Custom styles in the CSS editor.
  - Localized content for multilingual sites.
  - Non-default page variations; only default page variations are included. If a page doesn't have a default variation, the page is excluded. For example, if a page has two variations that are both set to audience-based visibility, then the page is excluded entirely.
- If you upgrade a managed template package, existing sites that are based on the upgraded template aren't updated.
- Some pages in a template are available only when a feature is enabled in your org—for example, the Article Detail page requires Salesforce Knowledge. An exported template includes just the pages that exist in your site at the time of export. Any site that's built using the exported template includes only those same pages. For further assistance, contact Salesforce Customer Support.

Note: Some components show errors when you deploy or export a site as a template and require you to manually configure the component's properties in Builder. For example, to set filters for the Object Home and Record List components in your exported site, navigate to the component properties. Then reconfigure the filter that you want to use from the dropdown menu.

Export and Package a Theme

- You can export a custom Experience Builder theme from Experience Builder but a standalone theme can't be included in a Lightning Bolt Solution.
- An exported theme name must be unique.

- Custom theme layout components that aren't listed in **Settings** > **Theme** > **Configure** aren't included. For theme layout components to be included, you don't have to assign them to a page.
- If you upgrade a managed theme package, existing sites that are based on the upgraded theme aren't updated.
- When you export a theme from Experience Builder, the system removes non-alphanumeric characters from your theme name. For example, My Theme #2 becomes My_Theme_2.

Export and Package a Single Experience Builder Page

- The exported Experience Builder page name must be unique.
- When you export a page, the system generates a developer name (`devName`) by prepending the site name and removing non-alphanumeric characters. For example, My #awesome page in the Acme site becomes Acme_My_awesome_page. Developer names longer than 80 characters are truncated.
- When you export an Experience Builder page, its page variations aren't included in the package. Export the page variations separately.
- Exported page variations use the naming convention `[Site Name]_[Page Name]_[Variation Name]`.

Original Page Name	Exported Page Name	Exported Page Developer Name
Coffee Fans	Coffee Fans	Acme_Coffee_Fans
West Coast (page variation)	Coffee Fans - West Coast	Acme_Coffee_Fans_West_Coast
East Coast (page variation)	Coffee Fans - East Coast	Acme_Coffee_Fans_East_Coast

- For images in the Rich Content Editor, we export the version used in the editor, which isn't necessarily the latest version of the asset file.
- Audience-based visibility criteria aren't included in the export process. Manually reenter this information after importing the page to the site in the destination org.
- You can't export individual login pages.

SEE ALSO:

Salesforce App Considerations

Export a Customized Experience Builder Template for a Lightning Bolt Solution

Export a Customized Experience Builder Page for a Lightning Bolt Solution

First-Generation Managed Packaging Developer Guide: Create and Upload a Managed Package

Requirements for Distributing Lightning Bolt Solutions

Before Salesforce can recognize a Lightning Bolt Solution that's ready for distribution on AppExchange, your solution must meet certain requirements.

Before you distribute your solution, use these checklists.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Requirements for Lightning Bolt Solutions

For all Lightning Bolt Solutions that are ready for distribution, make sure that you have:

☐ Included at least one of the following:

- A custom Lightning app
- A flow category that contains one or more flows
- An Experience Builder template

☐ Tested all site functionality and appearance across desktop, tablet, and mobile devices

☐ Confirmed that your customizations have no regressions (each release)

☐ Verified that Salesforce approves of all third-party technology that you use

☐ Ensured proper code coverage, and executed basic performance testing

☐ Adhered to all Salesforce Lightning developer guidelines (such as attribute enforcements)

☐ Included written installation and configuration documentation

☐ Developed appropriate customer support for custom functionality

Requirements When Including an Experience Builder Template

If your solution includes a template, make sure that you have:

☐ Developed a custom Experience Builder template

☐ Included at least one custom Lightning component (API version 40.0 or later)

☐ Included at least one custom Theme Layout component with a unique visual design

☐ Tested the template with the Strict CSP enabled in your site settings

Best Practices

- To improve automation and code coverage, use a Salesforce testing framework, such as the Lightning Testing Service (LTS).
- Include only essential Visualforce components and pages.

SEE ALSO:

Experience Cloud Developer Guide: Create Custom Theme Layout Components for Experience Builder

Lightning Aura Components Developer Guide: Salesforce Lightning CLI

ISVforce Guide: Publish Your Solution on the AppExchange

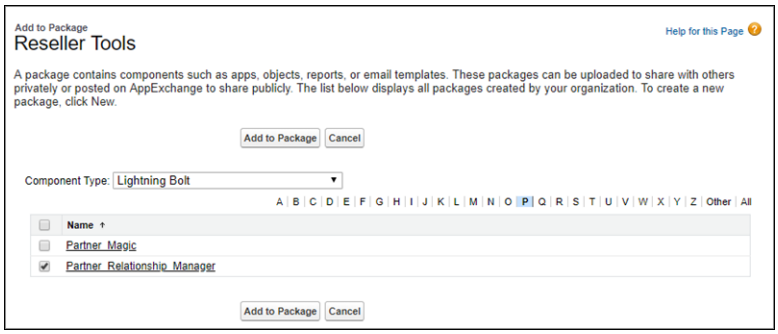
Security Developer Center

Package and Distribute a Lightning Bolt Solution

After you create a Lightning Bolt Solution, package the solution to distribute it to other users or orgs. You can upload the package to AppExchange to share or sell your solution.

A package is a container for something as small as an individual component or as large as a set of related apps. Packages come in two forms—managed and unmanaged. We recommend using only managed packages to avoid naming conflicts with other packages in your customer's org or your own. To create a managed package, use a Developer Edition org.

1. From Setup, enter `Package` in the Quick Find box, and then click **Package Manager**.
2. To package a Lightning Bolt Solution, select **Lightning Bolt Solution** as the component type, and select your solution. To package a standalone Experience Builder template, theme, or page, select **Lightning Community Template**, **Lightning Community Theme**, or **Lightning Page**, respectively, as the component type to add.
   All supported dependencies are included.



3. Upload the package. Then distribute it on AppExchange, or share the link privately with your clients, customers, or partners.

SEE ALSO:

Create a Lightning Bolt Solution

First-Generation Managed Packaging Developer Guide: First-Generation Managed Packages

First-Generation Managed Packaging Developer Guide: Create and Upload a Managed Package

ISVforce Guide: Publish Your Solution on the AppExchange

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences
- OR
- Be a member of the site AND an experience admin or publisher in that site

To create and upload packages:

- Create AppExchange Packages AND Upload AppExchange Packages

Customize Salesforce Tabs + Visualforce Sites

Update basic site settings like your site URL, site name, members, login options, and general preferences in the Administration tile of Experience Workspaces.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

You can customize your site at any time, but if you plan to make major changes, we recommend deactivating the site first.

1. Open Experience Workspaces.
2. Click **Administration**, then select what you want to customize.
   - Add Members to Your Experience Cloud Site
   - Add Tabs to Your Salesforce Tabs + Visualforce Site
   - Brand Your Salesforce Tabs + Visualforce Site
   - Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site
   - Customize Email Sent from Experience Cloud Sites for Email Verification
   - Override Default Pages in Your Salesforce Tabs + Visualforce Site
   - Configure Settings in Your Administration Workspace
   - Update Your Experience Cloud Site's Name, Status, and Description
3. To share the site with stakeholders while it's still in Preview, copy the URL displayed on the **Administration** > **Administration** page.

   By sharing your site in Preview, you can get useful feedback to incorporate before going live. Also, by having early members post, comment, and share records, your site appears active when members log in to the site for the first time.

   Note: You must add users as members of the site before you can share the site URL.

After you finish customizing your site, activate the site to make it available to members. If you enable welcome emails when you activate, a welcome email is sent to all members. If users are new portal users, their welcome email includes their username and password.

Brand Your Salesforce Tabs + Visualforce Site

If you're using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your site in Experience Workspaces. You can add your own logo, colors, and copyright so that your site matches your company's branding and is instantly recognizable to your site members.

Enable the Global Header for Salesforce Tabs + Visualforce Sites

In Salesforce Tabs + Visualforce site and Salesforce Classic, the global header lets you switch between your sites and your Salesforce org.

Choose a Landing Tab

If you are using the Salesforce Tabs + Visualforce template, you can select a landing tab for your site.

Add Tabs to Your Salesforce Tabs + Visualforce Site

If you're using the Salesforce Tabs + Visualforce template, you can add tabs to your site.

Tip: If you want to use all custom pages in your site, you can choose to hide tabs.

Before you begin, keep these things in mind:

- Enable the tabs that are required for the type of activity you're performing in this site. For example, sharing accounts and opportunities with your partners or sharing cases and solutions with customers who need support. Don't clutter your site with tabs that users don't need.
- Profiles control access to tabs. If a profile doesn't have access to a tab, the tab is hidden for that profile in the site. In that case, you must manually expose the tabs in the profiles for your site members so that they can see the tabs in the site.
- Lightning Component tabs aren't supported in Experience Cloud sites.
- Chatter Free users in your site don't see any tabs except the Chatter tab.

After you identify the features you want your site members to see, you can expose those features by choosing the corresponding tabs during setup. The tabs that you select also determine site navigation in the Salesforce mobile app.

1. Open Experience Workspaces.
2. Click **Administration** > **Tabs**.

   Tip: If you're using one of the preconfigured templates instead of Salesforce Tabs + Visualforce, the **Tabs** page is hidden by default. To display the page, click **Administration** > **Preferences**, then select **Show all settings in Site Management** or **Show all settings in Experience Workspaces**.

3. Select the tabs to include in your site from the Available Tabs list. To select multiple tabs, press CTRL.
4. To add a tab, click **Add**. To remove a tab, select it in the Selected Tabs list and click **Remove**.
5. To change the order that the tabs display, click **Up** or **Down**.

   The tab at the top of the list is the landing tab for the site. When members access the site, it's the first tab they see.

   If members don't have access to the site landing tab, they see the first tab that they have access to from the selected site tabs. If they don't have access to any of the tabs, they see the Home tab.

6. Click **Save**.

Important: Changing from the Salesforce Tabs + Visualforce template to an Experience Builder–based template removes all tabs from your site.

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites

Rename the Chatter Tab

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Rename the Chatter Tab

Most likely, many of your Experience Cloud site members use the Chatter tab as their home base. You can customize it to meet your company's branding.

The Chatter tab is the fastest way for your Experience Cloud site members to see what's most important to them: activity feeds, groups, bookmarks, files, and more. Many of your site members use the Chatter tab as their home base. Customize the name of the Chatter tab in your site to match your company branding—. For example, you can use your company's name or any other name that's recognizable to your members.

1. From Setup, enter `Rename Tabs and Labels` in the `Quick Find` box, then select **Rename Tabs and Labels**.
2. Select your default language from the `Select Language` dropdown list at the top of the page.
3. Under Chatter Tabs in Experience Cloud sites, click **Edit** next to the site you want to edit.
4. Type the singular and plural versions of your preferred tab name, for example, Partner and Partners. Select `Starts with a vowel sound` if appropriate.
5. Click **Save**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To rename the Chatter tab:

- Customize Application

  OR

  View Setup and Configuration

  AND

  Be designated as a translator

Brand Your Salesforce Tabs + Visualforce Site

If you're using the Salesforce Tabs + Visualforce template, you can customize the look and feel of your site in Experience Workspaces. You can add your own logo, colors, and copyright so that your site matches your company's branding and is instantly recognizable to your site members.

Important: Follow these steps to design your site's branding. If you're using the Experience Builder to create your custom pages, you can use the Experience Builder instead.

1. Open Experience Workspaces.
2. Click **Administration** > **Branding**.
3. Use the lookups to choose a header and footer for the site.

   First upload the files for your header and footer to the Documents tab. The header can be a GIF, JPG, or PNG file with a maximum file size of 20 KB. The footer must be an HTML file. The maximum file size for all HTML files is 100 KB. So if you have a footer HTML file that is 70 KB and you want to use an HTML file for the header, it must be 30 KB or smaller.

   The header you choose replaces the Salesforce logo below the global header. The footer you choose replaces the Salesforce copyright and privacy footer.
4. To choose a predefined color scheme, click **Select Color Scheme**. To select a color from the color picker, click the text box next to the page section fields.

   Here's how selected colors show up in your site and in the Salesforce mobile app.

Color Choice	Where It Appears
Header Background	Top of the page, under the black global header. If you select an HTML file in the Header field, it overrides this color choice. Top of the login page. Login page in the Salesforce mobile app.
Page Background	Background color for all pages in your site, excluding the login page.
Primary	Tab when it's selected.
Secondary	Top borders of lists and tables. Button on the login page.
Tertiary	Background color for section headers on edit and detail pages.

5. Click **Save**.

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites

Brand Your Pages from the Administration Workspace

Set Up Dynamic URLs with Experience Workspaces

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR
- Be a member of the site AND an experience admin or publisher in that site

Enable the Global Header for Salesforce Tabs + Visualforce Sites

In Salesforce Tabs + Visualforce site and Salesforce Classic, the global header lets you switch between your sites and your Salesforce org.

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

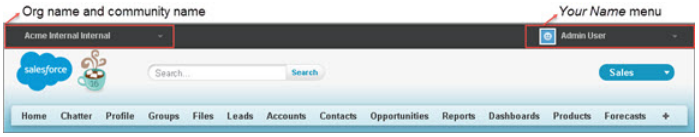
USER PERMISSIONS

To create permission sets:
- Manage Profiles and Permission Sets

To assign a permission set to a user:
- Assign Permission Sets

Digital Experiences must be enabled in your Salesforce org to use the global header.

Important: The global header is visible only in Salesforce orgs using Salesforce Classic. Salesforce orgs using Lightning Experience can use the App Launcher to switch between the org and various experiences.



The View Global Header permission is disabled by default for all standard profiles. To view the global header, assign the View Global Header permission either by selecting it on standard profiles, creating custom profiles, or by creating a permission set. Create permission sets to easily assign this permission to specific people.

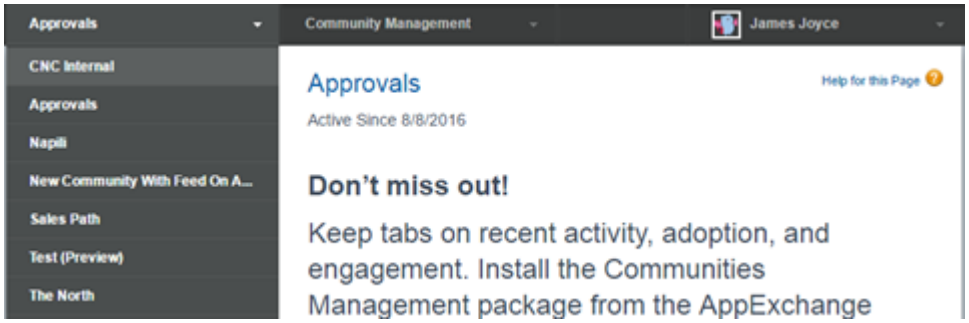
1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.
2. Click **New** and create a permission set that includes the System Permission `View Global Header`.
3. Assign the permission set to the appropriate users.

Users with this permission set see the global header at the top of all pages. They can use the menu on the left to switch between their Salesforce Classic internal org and any experience they have access to.

The `Your Name` menu on the right side contains links to edit contact information and log out. Internal users can also access Salesforce Help and links to Setup and other tools depending on user permissions and enabled features.

In a Salesforce Tabs + Visualforce site, users with either the Manage Experiences or the Create and Set Up Experiences permission see a gear icon ( ) they can use to switch to Experience Workspaces or Experience Management.

Note: Within Experience Workspaces or Experience Management, users see the global header and the Community Management menu, even if they don't have the View Global Header permission. However, we recommend that you still assign the View Global Header permission so users can switch between your Salesforce Classic internal org and experiences.



SEE ALSO:

Switch Between Your Salesforce Org and Your Experience Cloud Sites

Enable the App Launcher in Experience Builder Sites

Choose a Landing Tab

If you are using the Salesforce Tabs + Visualforce template, you can select a landing tab for your site.

In Experience Workspaces, go to **Administration** > **Tabs**. The first tab in the Selected Tabs list is the landing page.

There are multiple options for the landing tab in your site. Select the one that best meets members' needs.

- Chatter tab—If you select this tab, the feed is the first thing members see when they log in. This option is good for sites where people spend most of their time in Chatter and don't need a customized home page with additional components. You can also rename the Chatter tab.
- Home tab—If you select this tab, the Salesforce Home tab for your org is the first thing members see when they log in. The components that display on the tab were added to the Home Page by your admin. This option is good if you don't use Chatter or don't want a feed-based home page view.
- Custom Visualforce tab—Selecting this option lets you build a completely custom landing page.

Override Default Pages in Your Salesforce Tabs + Visualforce Site

For Salesforce Tabs + Visualforce sites, you can use company-branded Home and Service Not Available pages by overriding the standard pages in your site.

Note: These settings don't apply to Experience Builder sites.

- Use a Custom Home Page in Your Salesforce Tabs + Visualforce Site
- Use a Custom Service Unavailable Page in Your Salesforce Tabs + Visualforce Site

You can override other default pages in the Site Details settings for your Salesforce Tabs + Visualforce site. To do this, open Experience Workspaces. Under Administration, click **Pages** and then click **Go to Force.com**. For Salesforce Tabs + Visualforce sites, page selections in Administration automatically override any previously specified page selections in the Site Details settings.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Use a Custom Service Unavailable Page in Your Salesforce Tabs + Visualforce Site

On rare occasions, if your Salesforce Tabs + Visualforce site isn't available because of a service outage, Salesforce displays a generic Service Not Available page with Lightning Platform branding. You can replace this page with a custom company-branded static resource page for a personalized user experience for your Salesforce Tabs + Visualforce site members.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

The Service Not Available static resource:

- Must be a public .zip file 5 MB or smaller.
- Must contain a page named `maintenance.html` at the root level of the .zip file. Other resources in the .zip file, such as images or CSS files, can follow any directory structure.
- Must contain only files that have file extensions.

For more information, refer to *Assigning Salesforce Site Error Pages* in Salesforce Help.

Note: This setting doesn't apply to Experience Builder sites created with Experience Cloud. You can upload an Experience Builder Service Not Available page to your Salesforce Tabs + Visualforce site as a static resource, after it has been saved.

1. Open Experience Workspaces.
2. Navigate to **Administration** > **Pages**.
3. To search for and select your custom page, click next to **Service Not Available**.
4. Click **Save**.

If there's a service outage at any time, your community displays your selected page. A couple things to keep in mind:

- This page selection doesn't affect sites that use Site.com Studio pages.
- The Service Not Available page, after it's customized, is available for all Salesforce Tabs + Visualforce sites in the same domain. To avoid using the same page for all the sites in your domain, create and assign separate Service Not Available pages for each site.

  For example, consider a scenario where you have two Salesforce Tabs + Visualforce sites in your domain: a customer community (`universaltelco.my.site.com/customer`) and a partner portal (`universaltelco.my.site.com/partner`). If you use a custom Service Not Available page for the customer community, then the partner portal displays the same page during a service outage. You can create and assign a separate Service Not Available page to the partner portal.

  Domains with a custom URL that contains a root path prefix use the site's Service Not Available page for paths that aren't custom URLs of other sites and have their own Service Not Available pages.

  For example, sites `https://www.example.com/` and `https://www.example.com/site1` have assigned Service Not Available pages. Site `https://www.example.com/site2` doesn't have an assigned Service Not Available page.

  Requests to `https://www.example.com/`, `https://www.example.com/Page1`, and `https://www.example.com/site2` display the Service Not Available page assigned to `https://www.example.com/`.

  Requests to `https://www.example.com/site1` and `https://www.example.com/site1/Page1`, display the Service Not Available page assigned to `https://www.example.com/site1`.

  If a site doesn't have an assigned Service Not Available page, and the sites of parent custom URLs in the same domain also don't have assigned Service Not Available pages, the Maintenance page is displayed.

- In certain circumstances, when you configure your site to display a custom error page, your site displays the standard Service Not Available page instead. This change happens by design when you switch to using the Salesforce content delivery network (CDN).

This change also happens for sites that switch to using enhanced domains, because the Salesforce CDN is enabled by default for enhanced domains. For more information, see Assigning Salesforce Site Error Pages.

SEE ALSO:

Use a Custom Service Not Available Page for Your Experience Builder Site

Use a Custom Home Page in Your Salesforce Tabs + Visualforce Site

Personalize the standard Salesforce Tabs + Visualforce site home page with company branding by using a custom Visualforce or Site.com Studio page.

The Salesforce Tabs + Visualforce home page is shown to unauthenticated users in a public site and it allows you to specify a landing page for guest users without setting up redirects. This page is also known as your Active Site Home page.

Note: This setting doesn't apply to Experience Builder sites.

1. From Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**. Click **Workspaces** for the site you'd like to access.
2. Click **Administration** > **Pages**.
3. For the Home page:
   a. Select the page type: **Visualforce** or **Experience Builder** (to select a published Site.com Studio page).

      Note: If you select **Experience Builder**, only published Site.com Studio pages are included in the search results. You can't select pages from Experience Builder.

   b. Enter the name of the page or leave the field blank to get a list of available options.
   c. Click , then click the name of the page in the search results to select it.
4. Click **Save**.

For Salesforce Tabs + Visualforce sites, page selections in Administration automatically override any previously specified page selections in the Site Details properties.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Configure the Default Login Page to Use a Custom Home Page

If you're using external authentication providers and a custom home page, ensure that users are accessing the correct home page.

Edit the `CommunitiesLandingController` so that it has the correct `startURL` for your Salesforce Tabs + Visualforce site. The `CommunitiesLandingPage` is the Active Site Home Page for your site, meaning that it is shown when someone enters a direct URL to your site. For instance, if your domain is *`universaltelco.my.site.com`* and your site URL is *`customers`*, the `CommunitiesLandingPage` is shown when someone enters `https://universaltelco.my.site.com/customers`.

There are two methods for using a custom home page.

- Update the `CommunitiesLandingController` code to redirect to the new page:
  1. From Setup, enter *`Apex Classes`* in the Quick Find box, then select **Apex Classes**.
  2. Click **Edit** next to `CommunitiesLandingController`.
  3. Replace the code so that it reads:

```
public with sharing class CommunitiesLandingController {
public PageReference forwardToStartPage() {
}
}
```

  4. Replace *`https://universaltelcom.my.site.com`* with the URL for your site.
  5. Click **Save**.
- Alternatively, you can replace the Active Site Home Page with a custom Visualforce page.
  1. From Setup, enter *`Digital Experiences`* in the Quick Find box, then select **All Sites**.
  2. Click **Workspaces** next to the site name.
  3. Click **Administration** > **Pages** > **Go to Force.com**.
  4. In the Site Detail section, click **Edit**.
  5. In the `Active Site Home Page` field, select your custom Visualforce page.
  6. Click **Save**.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces:

- Manage Experiences OR Create and Set Up Experiences
- AND is a member of the site

To customize administration settings:

- Create and Set Up Experiences
- AND is a member of the site

To edit Apex classes:

- Author Apex

When a user enters the URL, they see the new Active Site Home Page.

Add Custom Pages That Don't Require Login

Within a site, portal, or community created with Experience Cloud, you can have publicly available pages that are accessible without requiring login, making them ideal for landing or marketing pages.

Important: This topic applies only to sites created with Salesforce Tabs + Visualforce.

Salesforce Tabs + Visualforce sites use Salesforce Sites technology to set a custom domain for your org and a URL prefix for each site created. If you want to further customize your sites beyond what's available in setup, you can use Salesforce Sites or Site.com to create customized pages.

Tip: Salesforce Tabs + Visualforce sites can have a combination of Visualforce and Site.com pages. By default, the pages you create don't require login, but you can add authenticated pages if needed.

1. Open Experience Workspaces.
2. Click **Administration** > **Pages** and then in the Advanced Customizations area, click either:
   - To create pages that don't require login or edit out-of-the-box error pages, **Go to Lightning Platform**.
   - To open Site.com Studio, where you can create public, branded pages, **Go to Site.com Studio**. You can also create authenticated pages that require login.
3. After you create a public page in Site.com Studio, you must publish the Site.com site to allow users to access the page.

For more information about creating pages, refer to these resources:

- Creating Site.com Pages
- Managing Salesforce Site Visualforce Pages
- Manage Salesforce Sites Standard Pages

Create Use-Case Driven Sites

Whether you're creating a site for self-service or one for partner vendors, Experience Cloud has the solution to fit your needs.

Experience Cloud and Marketing Cloud Integration with Journey Builder

With the Marketing Cloud Journey Builder, create personalized journeys for your site based on triggering events or geared for specific audiences. Greet new users with rich content emails, send reminders to users who need profile pics, or schedule follow-up emails for users who log a case. To use this feature, you must have both Experience Cloud and Marketing Cloud licenses.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Give Customers Access to Your Knowledge Base Through Help Center

A help center is a public-access, self-service site that makes it easy for people to find answers for themselves. Instead of filing cases through customer support, visitors find the information they need from the articles that you make available from your knowledge base. You reduce the load on your customer support team, and folks get the satisfaction of finding their own solutions.

Use the new Help Center template to create a help center in minutes. When your help center is in place, use a guided setup to step through help center configuration. The guided setup offers links that take you to relevant locations in the help center's user interface.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Tip: If your needs change, you can move from a help center template to another kind of customer portal. A process is available on page 641 in the Administration Workspace for making the switch.

Before You Begin

Here are some facts to help in your decision to select the Help Center template.

- Help Center offers limited support for standard components. For a list of supported components, see Which Components Can I Use with Each Template? on page 205
- Help Center is a public-only template, which doesn't include the site login page.
- Only specific object pages are fully supported, but the template lets you create other standard and custom object pages. For a list of supported pages, see Help Center Template Pages on page 640.

Before you create your help center, there are a few actions you can take to prepare the way.

Enable Salesforce Knowledge in Your Org

Before you can create a help center, Knowledge must be enabled for your org, and you must enable the Knowledge org preference. It's also useful to have a robust collection of Knowledge articles with a focus on solutions to common problems. Ideally, you already have Knowledge enabled along with a large collection of helpful articles. The main purpose of your help center is to give the public easy access to this useful information.

Plan your knowledge base and set up visibility for your data categories

The simpler your data is structured, the easier your help center is to navigate. Make the right content available to the public. You can choose the types of articles to make public so nothing sensitive or proprietary is at risk.

List the topics you intend to cover in your help center

Topics are the foundation of your help center. They make it easy for customers to discover all the information that you provide about a given subject. Talk to your customer support team about the things people ask about most. Base your Featured Topics selection on the most frequently asked questions. If you like, your topics can have a hierarchical structure—for example, you can set up topics with subtopics.

Set up an article layout specifically for your help center

The way an article is laid out can affect how easy it is to access the article's data. Don't hide the lead. Consider offering a summary section at the top so customers can get to basic information quickly.

Note: In Summer '18, we increased the limits on articles and translation languages for some editions. It's useful to know for your help center planning.

- Essentials: 500 Articles, 1 Language
- Enterprise: 50 K Articles, 5 Languages
- Unlimited 150 K Articles, 10 Languages

Gather your resources

Upload the text and image files you plan to use in your help center to your org.

- For the Featured Topics component, upload 250-by-250-pixel images—one for each featured topic. You can have up to 25 featured topics, but consider using fewer to keep your help center easy to navigate.
- Upload images for your help center's logo, login page background, and page header. Your help center images are a branding opportunity, so make them attractive and representative of your brand. The header can be a GIF, JPG, or PNG file with a maximum file size of 20 KB.
- Upload an HTML file for your page footer.

Note: Your default view of the help center includes the footer: Powered by Salesforce. You can easily delete it or replace it with your own footer content.

SEE ALSO:

Knowledge Settings
Create a Help Center
Organize Experience Cloud Sites with Topics
Set Up Featured Topics
Automatically Assign Topics to Articles
Contact Support Form
Configure Digital Experiences Settings
Salesforce Knowledge Help and Resources
Plan Your Knowledge Base in Salesforce Classic
Configure the Guest User Profile
Knowledge Article Types

Help Center Set Up Tasks

Help Center is designed with self-service in mind. The Help Center template comes with components and pages that you can use as-is or customize to suit your needs.

Get started with your own publicly accessible Help Center! We've put together a set of tasks and useful references for setting up a Help Center.

Plan Your Help Center	• Give Customers Access to Your Knowledge Base Through Help Center
Enable Knowledge in Your Org and Enable the Knowledge Org Preference	• Enable Salesforce Knowledge
Create and Configure Your Help Center	• Create a Help Center on page 638 • Organize Experience Cloud Sites with Topics on page 813 • Set Up Featured Topics on page 820 • Data Categories Best Practices

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

	• Automatically Assign Topics to Articles on page 818 • Contact Support Form on page 238 • Experience Builder Overview on page 381 • Add more features with Guided Setup • Configure the Guest User Profile for Unauthenticated Users on page 756
Add Branding and Customize Your Help Center Theme	• Customize Your Experience Builder Site • Customize Experience Builder Pages and Components • Customize Site Navigation • Custom Theme Layouts • Brand Your Experience Cloud Site on page 628

Create a Help Center

Set up a help center to give guest users access to the knowledge articles that you choose. Help users find solutions, and give them a way to contact you when the answer isn't available. This topic is for you if your org uses Classic Knowledge.

Before you begin, review the topic, "Introducing Help Center" on page 636, and take the advance steps it discusses.

This topic steps you through help center creation when your org uses Classic Knowledge. Generally, you create your help center site using the Help Center template, and then configure it using a guided setup.

1. In your org, go to **Setup** > **All Sites** and click **New**.
2. Click the **Help Center** tile, and then click **Get Started**.
3. Enter a name for your help center, and then complete the help center URL.
4. Click **Create**.
5. Go to your help center's Experience Workspaces, and click the **Guided Setup** tile. Then click the **Help Center** guided setup tile.
6. On the **Help Center** guided setup tile, click the Guided Setup link.
   This step launches the guided setup. The setup steps you through configuring your help center. Each step includes a link to the location in the help center user interface where you can do the configuration described in the step. Guided setup steps include:
   - Creating topics and assigning featured topics
   - Mapping topics to data categories
   - Setting up a Customer Support page
   - Setting up your Home page
   - Configuring search
   - Configuring any other pages you want to include in your help center
   - Doing some final configuration in the help center's Workspaces
   - Previewing and publishing your help center

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To create a help center

- Create and Set Up Experiences

To work with topics in the site's content management system (CMS)

- Create Topics
- Merge Topics
- Delete Topics
- Edit Topics

7. Create topics and assign featured topics.

   Topics are the fundamental unit of organization in your help center. Ask your customer support team about the situations they get called about most. Use their ideas to create topics that are of great interest to customers seeking solutions. Have 250 x 250 pixel images on hand for each featured topic. These images add to the look and feel of your help center. Create an FAQ topic that you can use as a default topic. Create an FAQ article for your help center with useful, general information.

   a. Go to Experience Workspaces, and click the Content Management tile.

   b. Click the **Topics** tab, and then click **Topic Management**.

   c. Add topics to your help center.

      Topics can be hierarchical, so you can add both topics and subtopics.

   d. Still in the Topics area of Content Management, click **Featured Topics** and Set Up Featured Topics on page 820.

8. Map topics to data categories using Automatic Topic Assignment on page 818.

   To make your articles visible in the help center, use data categories to automatically assign multiple topics to articles. This step is crucial. Salesforce Knowledge uses data categories to classify articles and make them discoverable. When you map topics to a data category, any article that uses the category also uses the topics that are mapped to it. Check the box for **Assign this Topic to all existing articles**. This step adds help center topics to existing articles and automates publishing to the help center.

9. In Experience Builder, open the Contact Support page, and set up the Contact Support and Case Deflection components.

   Your help center offers a Contact Support page that you set up in Experience Builder on page 455. The page comes with Contact Support and Case Deflection components. Case Deflection brings up articles and other resources that are related to the information a guest enters in the contact support form. For the Case Deflection component, set the default topic for "No Content" to your new FAQ topic. When guests come across a topic with no articles, they see your FAQ topic. Assign the FAQ topic to at least one article that contains lots of useful general information.

10. In Experience Builder, configure your home page.

    Get your image and HTML files ready to upload. The images are for your help center's logo, login page background, and page header. The header can be a GIF, JPG, or PNG file with a maximum file size of 20 KB. The HTML file is for your page footer.

    Note: Your default view of the help center includes the footer: Powered by Salesforce. You can easily delete it or replace it with your own footer content.

    a. Go to **Settings** > **General**, and give your guest user profile read access to your Help Center data categories on page 756.

    b. Click the Theme icon, and configure your theme. Add a logo and login background image, select colors and fonts, and tweak Theme Settings.

    c. Configure page components to apply your company's brand to your help center. For example, in the default theme, add images to the Hero Header and Hero Background components.

11. In Experience Builder, open the Home page, click the Global Search for Peer-to-Peer Sites component, and configure its properties on page 287.

    Under Autocomplete Search, select **Limit autocomplete search results to Discussions and Articles**.

12. Set up the other pages in your help center to look the way you want.

    Check out these useful help center pages: Topic Detail, Contact Us, and Article Detail. For the Knowledge Article component, clear the **Allow Voting** property. The votes of public users aren't counted.

13. In the Administration Workspace, click **Preferences**, and select **Give access to public API requests on Chatter**.

14. Preview, publish, and activate your help center.

15. Publicize your new help center. For example, share your help center URL with visitors to your company website.

SEE ALSO:

Help Center Set Up Tasks

Change from Help Center to a New Template

Help Center Template Pages

The Help Center template offers a public-facing, self-service portal where guest users can search your knowledge base for answers to their questions. It reduces the load on your customer support staff and gives customers the satisfaction of finding their own solutions.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Included Features

- Ready-made template
- Guided setup configuration
- Publicly accessible
- Self-service
- Curated—you decide which of your Knowledge articles is shared

Included Pages

Template Pages

- Home
- Contact Support
- Error
- Search
- Topic Catalog
- Topic Detail

Object Pages

- File Detail
- File List
- Related Record List

Content Pages

- News Detail

SEE ALSO:

Manage Your Site's Pages and Their Properties in Experience Builder

Page Properties and Types in Experience Builder

Change from Help Center to a New Template

Changing from a help center template to another template type is a simple process in itself. But the complexity increases with the things you must consider and actions you must take before you make the change. The complexity of a template change varies according to how much original help center content and configuration you want to preserve in the new template. Keep in mind that Salesforce partners have considerable experience with making template changes and can assist you with this process.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To change a help center template

- Create and Set Up Experiences

Important: Before you change templates in a production environment, try it out in your sandbox first. If you don't try it out in your sandbox, you run a strong risk of losing data, wasting time, and creating unnecessary cost.

In a template change, some objects and configurations are preserved and some aren't.

Preserved after a Template Change

- Featured and navigational topics
- Topic-to-article mapping
- Data category-to-topic mapping
- Data about trending articles and topics
- Topic statistics
- Your help center URL (but keeping the same URL is optional)

Not Preserved after a Template Change

- Your custom pages–There's a workaround. You can export your custom pages before you change templates. After you change templates, you can import them into the new template.
- Specific component configuration–Some configuration is preserved, like featured topics, navigational topics, and topic-to-article mapping. Some configuration isn't preserved, like search and type-ahead search configuration. A template change offers an opportunity to revisit component configuration. For example, in your help center, you let customers search articles and cases. In your new template environment, you can widen your list of searchable objects to make many more object types easy to discover.
- Branding–Before you change templates, consider whether you want to change or preserve brands in the new template. If you decide to keep the same brand, all the image assets used in the original template are available in your org's asset library. You have access to this library in Experience Builder under **Theme** > **Images**.
- Theme–When you change templates, the theme defaults to the new template's theme. You can reuse theme elements from the original template by grabbing them from your org's asset library.
- CSS styles–You can copy your CSS styles under **Theme** > **Edit CSS**, and paste them into a text file. After you switch templates, you can copy-and-paste your CSS from the text file into the new site.

After you preserve the things you want to retain from your original help center, you're ready to change templates.

1. Ensure that you have the latest version of the help center template.
   a. In Create and Set Up Experiences, open **Settings**, and click **Updates**.
   b. Confirm that you understand the update changes, and click **Update**.
   c. In the confirmation dialog, click **Update**. In the success dialog, click **Close**.
2. In the Administration Workspace, click **Settings** > **Change Template**. A message warns you that changing your site s template permanently deletes all existing customizations and pages.
3. Click the tile for the template you're changing to.
4. Click **Get Started**.

5. In the **Name** field, enter a name for your site.
6. In the **URL** field, enter the value you used for your help center or enter a new value.
7. Click **Create**.

After your new template is in place, bring in the elements from the original help center template that you want to preserve. For example:

- Import the custom pages you exported from your help center.
- Configure page components.
- Apply branding.
- Adjust your theme, including pasting the custom CSS styles you preserved.
- If you had featured topics in the help center, you can drag the Featured Topics component onto your Home page. Your original configuration of the Featured Topics component is preserved in the new template.

SEE ALSO:

Update Your Experience Builder Site's Template

Export a Customized Experience Builder Page for a Lightning Bolt Solution

Considerations for Changing Your Template

Change Your Experience Cloud Site Template

Manage Partner Relationships with Experience Cloud Sites

Experience Cloud sites are a powerful tool for partner relationship management. Invite partners to a site and share CRM data with them to drive channel sales and marketing. Create a shared pool of leads and pass them to partner users in the site. Configure deal registration to allow partners to submit qualified deals, minimize channel conflict, and get early pipeline visibility. Use the power of Lightning and Salesforce and drive your bottom line together.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: If you have an existing partner portal, you can continue to use the portal to collaborate with partners. However, we strongly recommend you migrate your partners to an Experience Cloud site. Partner portal licenses can be reused in a partner site.

Salesforce offers a powerful Lightning solution to help you build a partner site with button clicks, and no code: Partner Central. A site allows your partner users to log in to Salesforce through a separate website and access data you've made available only to them. In a partner site, you can:

- Extend Salesforce to securely expose CRM data with partners.
- Recruit, onboard, and educate partners (training and certifications).
- Manage your channel sales with programs, tiers, business plans, and partner scorecards.
- Manage lead distribution, deal registration, and quoting for channel sales.
- Streamline channel marketing with marketing development funds (MDF), marketing campaigns, and co-branded email communications.
- Provide a rich, personalized and mobile-ready experience to drive partner productivity
- Manage, track, and forecast partner sales ***alongside*** your direct sales in your Salesforce org.

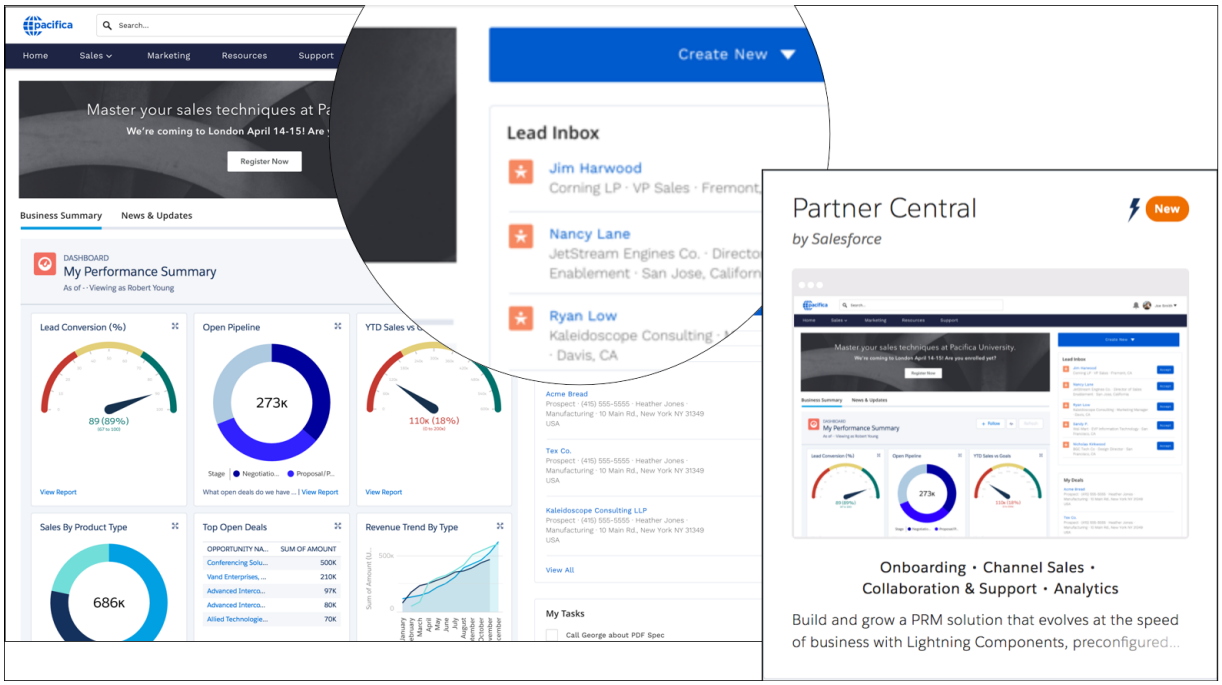
With Experience Cloud sites, you can publicly share information that you want all partners to see in a single location. You can also share data privately with specific partner users in the same site and restrict access with the security built into Salesforce.

Example: Here are a few industry examples of how a company can use a site to drive partner sales:

- A technology company can work with resellers to pass leads, register deals, and market products together
- A manufacturer can work with its distributors, wholesalers, and retailers in sites.
- An insurance company can work with independent brokers to track leads and sell insurance products.

Partner Central—Build Lightning Partner Sites

Quickly set up a custom, branded space where you can invite your partners and work on driving channel sales and marketing together. The Lightning Partner Central solution is optimized for channel managers and partners to collaborate on and track sales data. A simplified setup combined with rich branding and a responsive UI lets you quickly build an exclusive online experience for your partners.



Partner Central comes predesigned with partner sales workflows in mind so you can build and grow your partner network and bring CRM to your partners in a shared space:

- Use the Lead Inbox component to configure lead distribution
- Configure deal registration and allow partners to submit qualified leads to beat competition
- Share training materials, sales collateral, and other resources
- Provide market development funds to drive deals and incentivize partners
- Map reports and dashboards of your choice to track deal closure, lead activity
- Organize channel partners into programs and levels to provide them with different experiences and resources based on their rank and region
- Evaluate and promote partner users based on their performance with scorecards that track them against KPIs
- Share marketing campaigns and brand assets to provide the structure and guidance necessary for partners to successfully execute campaigns.
- Configure Google Analytics to monitor site activity

Get started with this handy recipe of setup tasks to create your own site with Partner Central.

Create a Partner Site with Partner Central—Setup Tasks

Partner Central is designed with partner sales workflows in mind and comes with components and pages that you can use directly or customize easily.

Get started with your own Lightning partner Experience Cloud site! We've put together a high-level roadmap—or a recipe, if you will—of the decisions and tasks involved with setting up a site with Partner Central.

Plan Your Partner Site	• What's Your Partner Experience Cloud Site Strategy? • Learn about Partner Relationship Management Roles and Responsibilities • Learn about Supported User Licenses and Experience Cloud Templates • Buy Partner Licenses • Experience Builder Site Limitations	*Prep Your Salesforce Org for a Partner Site*	• Set Up the Channel Manager Role • Create Partner Accounts • Create Partner Users • Partner Profiles, Roles, and Sharing Considerations • Super User Access • Delegated Administration
Set Up a Partner Site	• Update Org-Wide Settings • Create an Experience Cloud Site • Add Salesforce CRM Data to LWR or Aura Sites • Add more features with Guided Setup • Experience Cloud Sites and Site Users in Your Salesforce Org	*Enable PRM Features*	For channel management: • Configure Channel Programs and Levels • Set Up the Channel Management Console • Share Predesigned Reports and Dashboards with Channel Managers • Create Custom Dashboards for Channel Managers to Monitor Your Site • Configure Market Development Fund • Configure Campaign Marketplace • Configure Partner Enablement • Configure PRM for Slack and Direct Messaging in Experience Cloud Sites • Set Up Experience Cloud Site Moderation For partner productivity: • Set Up Lead Distribution • Set Up Deal Registration • Set Up Einstein Scoring • Set Up Enhanced List Views (Contact Intelligence View, Lead Intelligence View, Pipeline Inspection View)

Design Your Partner Site	• Customize Your Experience Builder Site • Customize Experience Builder Site Pages and Components • Customize Experience Cloud Site Navigation • Which Components Can I Use with Partner Central? • Customize the Lead Inbox • Customize the Quick Create Actions • Custom Theme Layouts • Create Pages and Groups Targeted at Specific Audiences	*Enable Reporting for Partners*	• Experience Cloud Site Reports • Custom Reports • Report Management for Partners • AppExchange Reporting Packages for Experience Cloud Sites

Enable Partner Functionality in Your Org

Buy partner licenses to enable partner functionality in your org. Partner licenses are required to use the Lightning Partner Central community template, set up partner accounts, and create partner users in your org.

When you buy partner licenses, the following functionality is enabled in your org:

- The Partner Central Experience Cloud Site template.
- The default Partner User profile. You can clone it to create custom partner profiles or extend data access via permission sets.
- Three standard partner roles: Partner User, Partner Manager, Partner Executive. When you create partner accounts, you can associate one of these roles with the partner users.
- A sharing rule group and category targeted at partner users.
- The **Manage External Account** and **Enable as Partner** buttons on accounts.
- A **Manage External User** and **Enable Partner User** button on contacts.

Note: If you have previously purchased partner portal licenses, you already have these features in your org.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

What's Your Partner Experience Cloud Site Strategy?

The type of partner site you create depends on your business, your channel sales program, and the tiers within it. For example, the strategy for a hardware manufacturer with a few partners is different from that of an insurance company with a large agent network.

Try to get early answers to these questions to plan your site strategy:

- How many Partner Community licenses do I need?

  Note: If you don't need access to all sales objects, such as opportunities, leads, and campaigns, you can also use Customer Community Plus licenses for partners.

- Can I invite all my partners to the same Experience Cloud site or do I need multiple sites?

EDITIONS

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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- What objects do I need to grant permissions for in my partner profiles? Do I need to three roles per account?
- What level of data visibility and privacy do I need for my site?
- Do I want to allow my partners to self-register?

For more ideas on planning your site strategy, check out this Trailhead module for Communities.

SEE ALSO:

Experience Cloud User Licenses

Migrate from a Partner Portal to an Experience Cloud Site

Salesforce recommends that you migrate from partner portals to Experience Cloud sites. Portal licenses are supported in Experience Coud sites so you don't need to switch licenses.

Note: Starting from Summer '13, portals are no longer available for new Salesforce orgs. Existing organizations using portals can continue to use their partner portals or migrate to an Experience Cloud site. If you don't have a partner portal, but want to share records and information with your partners, give an Experience Cloud site a try. Contact Salesforce for more information.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Why Migrate from Portals to Experience Cloud sites?

Experience Cloud sites offer all the functionality available in portals and customer portals, plus more features including:

- A rich, responsive, mobile-ready Lightning solution designed with channel sales and marketing workflows in mind: Partner Central
- Build personalized, rich experiences with your company's branding
- Collaborate with your partner users in groups and feeds
- Share files
- Access to reports and dashboards plus the ability to create custom reports for your site
- Single sign-on and login support for multiple authentication providers
- Content moderation, direct messages, and much more
- Single location where you can design, moderate, and manage your site

Plus, we're working round the clock to bring you more features in every release.

If You Continue to Use Partner Portals

All the information about setting up partner accounts, users, portals, and tracking partner sales is available in the Salesforce Partner Portal Guide.

Prep Your Org for a Partner Site

USER PERMISSIONS	
To view accounts:	Read on accounts
To create accounts:	Create on accounts
To disable a partner account:	Manage External Users
To create, edit, disable, or deactivate partner users:	Manage External Users
To create contacts:	Create on contacts
To view contacts:	Read on contacts
To create, edit, and delete profiles:	Manage Profiles and Permission Sets
To set field-level security:	Manage Profiles and Permission Sets AND Customize Application
To set sharing rules:	Manage Sharing

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

You've bought your partner licenses and have partner functionality enabled in your org. You're ready to collaborate with your partners and start closing deals together. Before you actually create a partner site, work with your channel manager to create partner accounts and users, assign partner roles, and manage permissions.

At the very outset, set up the channel manager role and assign it to the internal users in your org who manage channel sales and work with partner organizations.

Channel managers with the necessary permissions can perform the next steps.

1. Each partner account is automatically assigned three partner roles.

   Tip: We strongly recommend that you reduce the number of roles to one role: Partner User. To avoid role proliferation, it's better to use one role and grant super user access to users who need access to other users' data.

2. In Setup, type `Sharing Settings` in the Quick Find/Search box and edit the organization-wide defaults. Set the Default External Access setting to **Private** for all the objects you want to share with your partners.
3. Clone and customize the Partner User profile per your site's needs and, if necessary, grant extra permissions with a permission set.
4. Create a partner account for each partner organization you work with. Partner accounts store details about partner users and their sales data.
5. Also, plan how you want to use sharing rules to share data with partners.
6. Add users from each partner company as contacts on the respective partner account.
7. Convert the contacts on the partner account to partner users and assign a partner license, profile, and role.
8. Optionally, enable and grant super user access to partner users if you want them to view data owned by other users in their role hierarchy.
9. If you work with many partner users or don't want to deal with user management for a partner organization, consider delegating user administration.

With that, you're ready to set up a site and assign partner users to it.

SEE ALSO:

Default Organization-Wide Access Levels

Control Which Users Experience Cloud Site Users Can See

Set Up the Channel Manager Role

Channel managers are internal users who manage your partner accounts and partner users. Before setting up a partner site, identify an internal user to play the channel manager role.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Channel Manager Role

Ideally, channel managers should create all the partner accounts for the partner organizations they manage. All partner users associated with a partner account automatically fall below the channel manager in the partner role hierarchy. So all the data owned by those partner users rolls up and is visible to the channel manager.

Channel Manager Profile

Profiles determine the permissions users have, page layouts they see, the tabs and record types available to them, and other settings. Create a custom profile for channel managers or use a permission set to grant permissions to a standard profile. A few tips on what you might want to include:

Grant the "PermissionsManagePartners" permission
When this permission is enabled, channel managers can create partner accounts and partner users.

Make the following objects available to channel managers
Leads, Accounts, Contacts, Opportunities, Documents, Campaigns, Products, and any other object you plan to share with partner users in your site.

Assign record types
Assign record types to channel manager profiles. For example, the Lightning Partner Management solution includes two lead record types: one to track sales leads and the other to register deals. Make sure that your channel manager has access to both.

Make the `Partner Account` field visible to channel managers on leads, accounts, and opportunities
Channel managers can create list views or reports for tracking partner user activity.

Assign page layouts
Assign the appropriate page layouts to your channel manager profiles.

Make the `Last Transfer Date` field visible to channel managers on leads
Channel managers can create lists views or reports for tracking partner user activity.

More Tips

- Create a public sharing group for channel managers. You can use this group for filtering and controlling access to documents.
- Create a lead queue for channel managers. You can use this queue for lead assignment rules.

Create Partner Accounts

Add each company with which you partner to Salesforce as a business account. We recommend that channel managers create partner accounts so they can view all partner data.

Partner accounts are Salesforce accounts that a channel manager uses to manage partner organizations, partner users, and activities when using a partner site or partner portal. A channel manager who owns a partner account can access all the data associated with the partner account and the associated partner users.

Note: The partner user role is a subordinate of the account owner's role. All data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a partner user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.

1. Create a business account.
2. Click **Manage External Account**, and then click **Enable as Partner**.

   The **Enable as Partner** and **Disable Partner Account** actions aren't available in the Salesforce mobile app.
3. In the confirmation dialog, select **Yes, I want to enable this account as a Partner Account**.
4. Click **Confirm**.

   Note:
   - If your organization has person accounts, they cannot be used as partner accounts. Only business accounts can be used as partner accounts.
   - Partner accounts can't be deleted, but they can be disabled.
   - To enable a partner in Lightning Experience, add the **Enable Partner User** button to the **Salesforce Mobile and Lightning Experience Actions** section on the Account and Contact page layouts.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view accounts:
- Read on accounts

To create accounts:
- Create on accounts

To create a partner account:
- Manage External Users

After you create a partner account, you can add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with access to CRM objects, such as opportunities, leads, and campaigns. Partner users can access and modify the Salesforce data you share with them by logging in to a site. They can be added to account or opportunity teams.

SEE ALSO:

Add Teams to Your Accounts

Disable Partner Accounts

You can't delete partner accounts, but you can disable them. Disabling a partner account disables partner users associated with the account. We recommend disabling a partner account only if the account was accidentally enabled for site access.

If you choose to disable a partner account:

- Up to 15 active and inactive external users associated with the account are permanently disabled. You also remove them from all sites, groups, teams, permission sets, and sharing rules they're associated with.
- If there are more than 15 active or inactive external users associated with an account, you can't disable it. Disable the users before disabling the account.
- Roles and groups associated with the account are permanently deleted and not moved to the Recycle Bin.

1. Go to the account detail page for the account you want to disable.
2. Click **Manage External Account**, then click **Disable Partner Account**.
3. Click **OK** to confirm.

If you decide to re-enable the account in the future, you can re-enable individual contacts as partner site users. Re-enabling a contact for a partner site creates a partner user record that is not associated with the previous partner user and role. You can't restore deleted roles and groups.

Warning:

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view accounts:
- Read on accounts

To create accounts:
- Create on accounts

To disable a partner account:
- Manage External Users

Create Partner Users

After you create a partner account, add users to the account as contact records and then convert them to partner users. Partner users are Salesforce users with access to CRM objects such as opportunities, leads, and campaigns. Partner users can access Salesforce data when they're invited to a site.

Tip: Before creating partner users, configure your Experience Cloud site so your partner users don't log into it before it's ready.

1. View the partner account contact you want to convert to a partner user.
2. On the contact detail page, click **Manage External User** and choose **Enable Partner User**.

   Note: To manage an external user in Lightning Experience, add the following buttons to the **Salesforce Mobile and Lightning Experience Actions** sections of the Account and Contact page layouts.

   - On Accounts:
     - **Enable as Partner**
     - **Disable Partner Account**
     - **Disable Customer Account**
   - On Contacts:
     - **Enable Customer User**
     - **Enable Partner User**
     - **Enable Super User Access**

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, disable, or deactivate partner users:
- Manage External Users

To create contacts:
- Create on contacts

To view contacts:
- Read on contacts

- **Disable Customer User**
- **Disable Partner User**
- **Disable Partner Super Access**
- **Log in to Experience**
- **Log in to Portal**

3. Edit the user record for this partner and assign a partner license, role, and profile.

   Tip: You can use a Customer Community Plus license if the user doesn't require access to CRM objects, such as opportunities, leads, and campaigns.

4. Click **Save**.

After you create a partner user, you can edit the partner account and the partner user independently. Changes made to one aren't reflected in the other.

Tip: To check or troubleshoot issues with the partner user account, on the contact detail page, click **Manage External User** and choose **Log in to Portal as User**. A new browser window opens and you're logged in to the site as a site user.

Consider the following when creating partner users:

- The available profiles for the partner user are limited to the Partner User profile or profiles that have been cloned from it.
- The **Role** dropdown is read-only the first time you enable a contact as a partner or customer user for an account. The next time you enable a contact on this account as a customer or partner user, you can select a **Role** for the user.
- Unlike a standard user, the partner user role is automatically assigned based on the account name.
- The partner user role is a subordinate of the account owner's role. All data for the partner user role rolls up to the partner account owner's role. Keep in mind that if you disable a partner user, their partner user role becomes obsolete and their data no longer rolls up to the partner account role.
- Partner users and contacts can't be deleted. If you no longer want a partner user to have access to their site, deactivate the partner user.
- If you've enabled a user as a delegated administrator, note the following requirement. Before the user can create an external user, you must add at least one partner profile to the Assignable Profiles related list and assign the user the "Manage External Users" permission.

SEE ALSO:

Experience Cloud User Licenses

Partner User Profile

When you buy Partner Community licenses, the Partner User profile is automatically created in your org. The Partner User profile can't be modified, but you can clone it or create permission sets to specify what partner users can do.

Note: The Partner User profile is also available in your org if your organization has bought Partner Portal or Customer Community Plus licenses.

The profile you assign to partner users defines what data they can access within a site. For example, you can control whether users can view, create, or edit cases and custom object records using profiles and permission sets. You can also clone the Partner User profile and create custom profiles with varying permissions.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

For each cloned profile, ensure that the "API Only User" permission is not selected. Users associated with this permission selected aren't able to log in to their sites.

Partner User Roles

USER PERMISSIONS	
To manage partner users:	Manage External Users
To create, edit, and delete profiles:	Manage Profiles and Permission Sets
To create, edit, and delete page layouts:	Customize Application
To set field-level security:	Manage Profiles and Permission Sets AND Customize Application
To set sharing rules:	Manage Sharing

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

When you enable the first external user on a partner account, a user role hierarchy is created for that account. This role hierarchy rolls up to the account owner (typically, the channel manager). The three roles in this hierarchy are Partner User, Partner Manager, or Partner Executive. When you create contacts on the partner account and convert them to external users, assign one of these roles to them.

The Partner User role rolls up to the Partner Manager role, which rolls up to the Partner Executive role. The Partner Executive role rolls up to the Channel Manager role. Partner users can view and edit all data owned by or shared with users below them in the hierarchy, regardless of the org's sharing model.

Note: Changing this setting doesn't affect the number of roles for existing accounts. For example, let's say you start with one partner role in your org, and create partner accounts with just one role. Then you increase the number of roles to three. The partner accounts created with one role continue to have just one, even after you change the default number of roles.

The role names include the partner account name. For example, the partner account name is Acme. The three roles created for the Acme account are Acme Partner User, Acme Partner Manager, and Acme Partner Executive. If the ownership of a partner account is changed to another channel manager, the partner user role is moved to that location in the role hierarchy.

We recommend that you reduce the number of roles to one. Grant super user access to partner users if you want them to see other partner users' data.

For large Salesforce orgs, we also recommend that you move your partner roles to a separate branch in your role hierarchy. Then, grant the partner users access to the partner account with a sharing rule. This configuration improves performance for realignment operations when there are account owner changes.

You can delete partner roles, in which case the roles are renamed to maintain the hierarchy. For example, if the Manager role is deleted from a three-role hierarchy of Executive, Manager, and User, then the Executive role is renamed to Manager. The object ID remains the same. When you create a partner role, it's automatically placed at the top as a parent. You can delete multiple roles in bulk for better performance. For example, if most of your users are assigned the User role, you can delete the Executive and Manager roles. For more information on deleting partner roles, see the SOAP API Developer's Guide.

Portal user roles aren't included on the role hierarchy setup page. You can access portal user roles from the user's detail page. You can edit the Label, Role Name, and Description fields on the user role. Contact Salesforce Support to enable editing on system-maintained portal user role fields.

SEE ALSO:

Experience Cloud User Licenses

Configure Digital Experiences Settings

Sharing Data with Partner Users

Sharing groups and a sharing rule category are available by default in your org to share Salesforce data with partner users in an Experience Cloud site.

Tip: Org-wide defaults and field-level security also control data access for partners in Experience Cloud sites. Set the Default External Access setting to **Private** for all the objects you want to expose to partner users in your site.

After you buy partner licenses for your org, the following groups and sharing rule category are created:

Group or Category	Description
All Partner Portal Users group	Contains all partner users in your organization
All Internal Users group	Contains all Salesforce users in your organization
Roles and Internal Subordinates sharing rule category	Allows you to create sharing rules in which you can choose specific Salesforce users in your organization by role, including users in roles below the selected role. Partner roles are excluded.

Use these groups and the sharing rule category to easily create sharing rules that grant all Experience Cloud site, portal, or Salesforce users access to specific data.

Note: Customer Community licenses support sharing sets, but not sharing rules. And currently, sharing sets don't support objects that are associated with multiple other objects of the same type. To use such features, your community members must have the Customer Community Plus or Partner Community license. With that said, sharing sets support the Contacts to Multiple Accounts feature by using the **RelatedAccount** value in the sharing-set configuration.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage partner users:
- Manage External Users

To set field-level security:
- Manage Profiles and Permission Sets

  AND

  Customize Application

To set sharing rules:
- Manage Sharing

Set Partner Username Uniqueness Requirement to the Org Level

When you add a user to an Experience Cloud site, the username must be unique across all Salesforce orgs by default. However, you can enable the **Require unique usernames for partners in this org** setting to restrict the unique username requirement to this org only. After you turn on this setting, you can't turn it off.

Orgs created after Winter '19 automatically contain username uniqueness at the org level. Contact Salesforce Customer Support to enable this option in orgs created before Winter '19, then go to **Setup** > **Digital Experiences** > **Settings** to turn on this preference. To avoid SSO errors when usernames are reused, deactivate existing federated IDs on the user profile page before enabling the permission. After it's enabled, partners are required to provide their org IDs when logging in through an API.

Note: Uploads using Data Loader, Excel Import, and Sendia aren't available to partner users with this preference enabled.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Enable Leads for Visualforce Sites

If you are using the Salesforce Tabs + Visualforce template, enable leads for partner users in your Experience Cloud site so that they can access and create leads in your sites.

When you enable leads for partner users in your site, you can assign leads to those members. Also, partner users can edit leads, create leads, import leads, and mass update leads in a list view.

1. Open Experience Workspaces.
2. Click **Administration** > **Tabs**, and add the **Leads** tab to the list of available tabs in your site.
3. In Setup, set tab visibility and object permissions. You can either set them on the profile or using a permission set. If you plan to apply these permissions selectively, we recommend using a permission set .
   a. If using a permission set, use the following settings for leads:
      - In the Tab Settings, select Available and Visible.
      - In the Object Settings, select Read, Create, and Edit.
   b. If using a profile, such as the Partner User profile, set the leads tab setting to `Default On` and enable the Read, Create, and Edit object permissions for leads.
4. Optionally, you can assign extra permissions that enable advanced features for your partners. If you plan to apply these permissions to only some of your partner users, we recommend creating separate permissions sets.

   Note: Partner users with legacy portal licenses can use these advanced features in sites, but not in portals.

Feature	Partner User Permission Needed
To import leads using the **Import Leads** link on the Leads tab in your site.	"Import Leads"
If your partner user is importing leads, it might also make sense to allow them to import accounts and contacts using the **Import My Organization's Accounts & Contacts** link on the Accounts and Contacts tabs in your site.	AND Optionally, "Import Personal Contacts"
To change the status of multiple leads via the **Change Status** button.	"Manage Leads"
To change the owner of multiple leads via the **Change Owner** button.	"Transfer Leads"

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable leads for partner users:
- Manage Profiles and Permission Sets

Assign Cases to Partners

Assign cases to partner users so they can view, modify, and update case information.

Before you assign cases to partners, ensure partners have permissions to read and update cases. You can only assign cases that you have access to.

1. On the case detail page, click **[Change]** next to the **Case Owner** field.
2. Select **Partner User** from the Owner drop-down list and enter the name of the partner user.
3. Optionally, select the **Send Notification Email** checkbox to send an email to the new owner.
4. Click **Save**.

The partner user can view and edit the case from their Experience Cloud site.

Note:

- Case comments added by partner site users are public and visible to any user that can view the case.
- You can create case assignment and escalation rules that automatically assign cases to partner users based on criteria that you define.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign cases to partners:

- Edit on cases

  AND

  Transfer Cases or Transfer Record

Assign Tasks and Events to Partners

If you have added a calendar to your Experience Cloud site, you can add events to it. Partner users with the Edit Events permission can create and edit their own events. Also, with the appropriate field-level security settings, partner users can view and create activities related to leads or opportunities.

Partner users can add tasks to leads or opportunities as reminders of particular tasks. Administrators and channel managers can view the activity history for a particular lead or opportunity, or use reports to track activities assigned to partner users. A partner user can only add tasks for or see calendars shared by:

- Other partner users assigned to the same account.
- The channel manager for their account.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign events to partner users:

- Edit Events

Configure an External Account Hierarchy

Set up an external account hierarchy to share data seamlessly with other external users.

Note: This feature is available in orgs with Partner or Customer Community Plus licenses.

External account hierarchies work like Salesforce role hierarchies. You can share data without creating sharing rules. For example, if you have a child record and a parent record in the same external account hierarchy, the record data owned by users associated with child accounts is shared with users in parent accounts.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

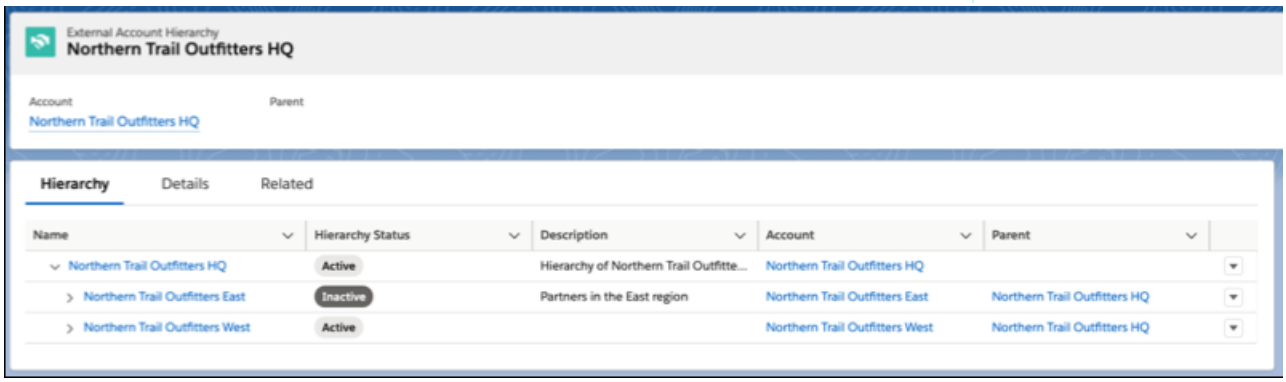
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To manage external users:
- Manage External Users

To create, edit, and delete profiles:
- Manage Profiles and Permission Sets



Note: Sharing rules can work along with external account hierarchies. Data shared by sharing sets doesn't roll up in role hierarchies.

Learn more about external account hierarchies in this video.

Watch a video

1. Enable external account hierarchies.
2. To create a hierarchy, enter `External Account Hierarchies` in the App Launcher and then select **External Account Hierarchies**.
3. Click **New**.
4. Enter a name for the external account hierarchy, and select the account that it's associated with.
5. Check the **Is Hierarchy Active** box.

6. For the Hierarchy Type, select **Partner**.
7. Save your changes.
8. To create a level within your hierarchy, click the dropdown arrow on the External Account Hierarchy tab, and select **New External Account Hierarchy**.
9. Specify a name for the new hierarchy and the account that it's associated with.
10. Select the external account hierarchy that you created in Step 4 as the Parent for this hierarchy.
11. Repeat steps 5 through 7.
12. You can continue to build your hierarchy up to five levels deep. If you need a hierarchy that's more than five levels deep, contact your Salesforce account executive.

Optimize Account Roles to Improve Performance and Scale

If you expect a large volume of business accounts with a single Experience Cloud user, we recommend enabling Account Role Optimization (ARO) to ensure the best performance possible. ARO minimizes the number of roles created for users with licenses that require external user records to be associated with roles. The fewer the roles, the better the performance of your Experience Cloud site.

Without ARO, the default number of site roles (1 to 3) is created for every user created, even if they aren't required to share data. A high volume of roles impact performance and can potentially reduce the scale of your site.

With ARO enabled for an external role-based user who is the only external role-based user for an account, a shared person role is created and assigned to them. It rolls up to the account owner. When a second user with a role-based license is added to the account, more roles are necessary to support sharing data. The number of account roles are created based on the default number of roles, and the lowest level (Worker) role is assigned to all external role-based account users. In a three-role hierarchy, the Executive, Manager, and User roles are created. The top-most role rolls up to the account owner.

Account Role Optimization interacts with experience cloud licenses independently. For example, if an account has a single user with a Customer Community Plus license and two users with Partner Community licenses, ARO applies only to the Customer Community Plus license user. The user with the Customer Community Plus license is assigned to the shared customer site person role. Each user with the Partner Community license is individually assigned to one of the account's partner site roles. This feature doesn't affect role usage for person accounts.

Role or Community User Allocations	Allocation	Details
Total roles for users with licenses that require external users to be associated with roles.	50,000	This allocation includes all roles associated with users who hold licenses that require external users to be associated with roles, such as Customer Community Plus and Partner Community licenses. If you need more roles, contact Salesforce Customer Support and ask for a Large User Volumes assessment.
Maximum person account site users that a Salesforce user can own	50,000	Contact Salesforce Customer Support to increase this allocation.

From **Setup** > **Sharing Settings** > **Other Settings**, enable **Minimize the number of roles created, which improves performance by cutting down processing loads**.

Note: We recommend that you also run the Salesforce Optimizer app to eliminate any unused roles.

Review how account role optimization responds to account changes.

Change to Account	Account Role Optimization Response
Account merges	A shared person role is used when an account merge results in a single Experience Cloud site user, a single portal user, or one of each type.
Change in account ownership	The single Experience Cloud site user assigned to the original account owner is reassigned to the new owner's shared person role.
Community user license upgraded to a role-based community user license	If the account owner doesn't already have another role-based Experience Cloud site user, a shared person role is assigned to the site user.
Contact moved to a different account	Regular Experience Cloud site roles are used regardless of whether a role-based site user exists in the new parent account.

If you require additional roles after enabling account role optimization configure person account owner power users. Person account owner power users can own as many customer or partner portal accounts as are needed. They can't change their role, look up to a parent role, or reparent their role. Person account owner power user objects can't be created if deferred sharing is turned on for your org.

Create a PersonAccountOwnerPowerUser object via API. Enter the user ID of the power user and the type of users that they can own, `Customer` or `Partner`.

Note: Only users at the highest level of a hierarchy can be added to the PersonAccountOwnerPowerUser object.

SEE ALSO:

Sharing Considerations for Using Account Role Optimization in Experience Cloud Sites

Partner User Roles

Create Experience Cloud Site Users

Sharing Considerations for Using Account Role Optimization in Experience Cloud Sites

The combination of role-based sharing and account role optimization (ARO) provides access to records and reports across accounts in Experience Cloud sites. Consider using targeted sharing access when you activate account role optimization. By using ARO and role-based sharing, an account's records are exposed to other accounts that roll up to the same shared person role.

Note: Role-based sharing and account role optimization are available for Customer Community Plus and Partner Community licenses.

Here's an example of how account role optimization can help manage roles.

Acme has a high volume of customer and partner Experience Cloud site accounts. Account role optimization helps minimize the number of Experience Cloud site roles. By using account role optimization, multiple site accounts can share a person role.

Acme has Apex sharing code that shares certain types of records based on roles. Account role optimization combined with role-based sharing exposes these records to site users across multiple accounts in Acme's org and sites.

Acme admins and devs review the Apex sharing code, triggers, and workflows. They locate every instance where record access is linked to roles, remove role-based sharing, and write code to target sharing access to specific site users.

When using account role optimization, adjust your settings to share directly with account users.

Consideration	Recommendation
Using Apex Sharing Code and Apex Triggers	Review your existing Apex sharing code, triggers, and workflows, and determine if record access is linked to roles. Update your Apex sharing code to target the user instead of a role if an Experience Cloud site user from an account that uses ARO must access specific records. Consider what action to take if a second user is added to the account and a new account role is created.
Using Record Access on a Role	If you grant record access by using a role created by ARO, the original user loses access to the record if a second user is added to the account. An Apex trigger or workflow can prevent access loss. **Recommendation:** Create an Apex trigger or workflow to allow the site user to retain access to records even if a second site user is added.
Sharing Records, Folders, or Reports with Experience Cloud Site Accounts	If you want Experience Cloud site account users to have access to: • records • folders • email folders • reports • dashboards • list views • dashboards Use targeted sharing. If you use sharing rules, don't target the shared person role. Role-based sharing grants access to all accounts that roll up to the shared person role. **Recommendations:** Create a public group and add the site user to that group. Then make the public group the sharing rule's target. Another option is to use manual sharing or Apex-managed sharing to share the object directly with a user. Share list views, folders, reports, or dashboards directly with account users instead of using role-based sharing.

In Salesforce orgs created before February 8, 2024, use the Convert External User Access Wizard to reduce the possibility of over sharing data. It converts owner-based or criteria-based sharing rules that include the Roles, Internal, and Portal Subordinates to include the Roles and Internal Subordinates instead. In orgs created on February 8, 2024 or later, access is secure by default. Records shared with the Roles and Internal Subordinates group through sharing rules or other mechanisms remain accessible only to internal users.

One final note on sharing. For single user accounts, ARO is incompatible with External Account Hierarchies. External Account Hierarchies uses roles to share data from child accounts to parent accounts. ARO uses a single role that's shared across several accounts.

Use a Shared Person Account Role for Community Users

Convert single-user accounts associated with sites to use a shared person account role. A shared person account role is one role that the platform creates and assigns to all external role-based users that are in a single-user account.

Important: If you have a large number of business accounts that have a single Experience Cloud site user, we recommend enabling account role optimization (ARO). With ARO enabled for an external role-based user who is the only external role-based user on the account, only one role is created and assigned to the user. Without ARO, the default number of account roles (1 to 3) is created and assigned to the user. The fewer number of roles, the better the performance of your site.

The PortalRole field in the User object is used to specify user roles.

1. To use shared person account roles, enable account role optimization.
2. To update an Experience Cloud site user role and convert the user to the shared person account role, use code as shown in this sample Apex code.

```
User u = new User();
u.Id = '<user id>';
u.PortalRole = 'PersonAccount';
update u;
```

SEE ALSO:

Optimize Account Roles to Improve Performance and Scale

Manage Channel Partnerships with Channel Programs and Levels

Use channel programs and levels to organize and manage channel partners. Within each program, you can group partners into levels, such as bronze, silver, and gold, and promote them based on performance. Use sharing groups, audience targeting, and sharing settings to manage access to resources based on program or level.

Organize Partner Users

- Group partners by type or geography
- Create levels within each program that organize partners by position or rank
- Add or remove members from channel programs or levels using groups
- Promote or demote users by changing group membership

Manage Access to Resources

- Use audience targeting to create different versions of a page with criteria fields specific to each program level
- Use the criteria fields for audience targeting to assign visibility to certain components or branding sets
- Set organization-wide defaults and sharing settings to control access to Channel Program Level and Channel Program Member objects
- Offer incentives to different levels, such as market development funds, to motivate partner users to meet Key Performance Indicators(KPIs)

Track Individual Performances

- Measure partner users' performances, and establish benchmarks for their channel programs

- Customize partner scorecards so that you get the report summary results that channel account managers or executive teams wants to see
- Add multiple scorecards for tracking different categories

SEE ALSO:

Considerations for Audience Targeting in Aura Sites

Market Development Funds

Track Performance with Partner Scorecard

Manage Channel Program Members with Sharing Groups

Create a Channel Program

Channel programs help channel managers organize multiple-channel sales organizations. Managers can create programs for different types of partner users, like Resellers, Value Added Resellers (VARs), Distributors, and Managed Service Providers (MSPs). They can also organize partner users based on geography or level of expertise.

Channel Programs are available to users with Partner Community licenses.

Create a channel program to provide partner users access to leads within their region, relevant marketing events, and relevant resources. If a partner user joins a team, you can add them to a channel program by making them a channel program member. You can add or remove channel program members from a channel program at any time.

Tip: Enable feed tracking on the Channel Program Member object to easily track partner activity, such as when a member changes to a different level. Be sure to add the Name column to the Channel Program Member related list. You can use the name to navigate to a member's feed.

1. From the App Launcher, find and open **Channel Program**.
2. Click **New** and enter a name, category, and description.
3. Activate the Program.
4. Save the channel program.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create channel program
- Create on channel program

Create Channel Program Levels

Motivate partner users to meet Key Performance Indicators (KPIs) using program levels. Create multiple levels within a program, and assign each partner user to a level that is based on their performance. Different levels can offer different incentives. For example, the Gold level can provide access to market development funds, which can be used to help the partner make more sales. Channel program members assigned to the Silver level can work toward the Gold level to gain access to market development funds.

Channel Programs are available to users with Partner Community licenses.

EDITIONS

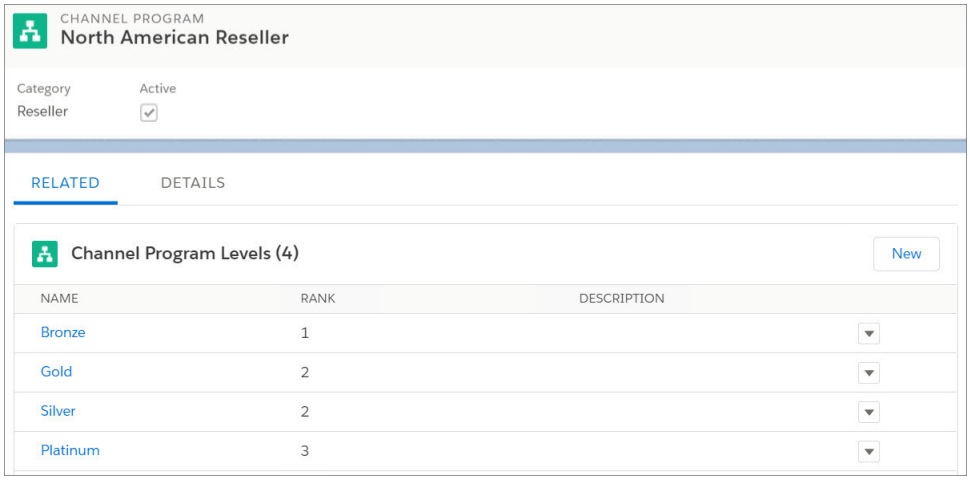
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create channel program level

- Create on channel program level



Note: The My Channel Program list view shows levels of channel programs owned by and shared with a user.

Channel program levels help you organize members of a program into groups that are based on their performance and share different resources with different groups.

1. From the App Launcher, find and open **Channel Program Levels**.
2. Click **New** and enter the name, channel program, rank, and a description.
3. Save the channel program level.

Manage Channel Program Members with Sharing Groups

Use sharing groups to manage Channel Program members. When new partner users join a team, you can add them to a Channel Program Member group. You can also move partner users to another group when they are promoted, demoted, or transitioned to a different area of expertise.

You can also use Channel Program Member sharing groups to manage access to resources within levels, such as public queues, list views, sharing rules, and folders.

Note: Deleting a partner account that was added as a channel program member, deletes the associated channel program member. Undeleting the partner account brings back the account and the channel program member, but the account is no longer enabled as a partner account.

Tip: Org-wide defaults and field-level security control data access for partner users in channel groups. Set organization-wide default to **Private** on Channel Program Level and Channel Program Member objects. Grant each partner user access to their level and member records to ensure that they have visibility into their accounts and opportunities.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Channel Program Member Limits

Add up to 50,000 channel program members per organization.

Contact Salesforce Customer Support to increase the number of channel program members in your organization beyond the current limit.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Account Relationships and Account Relationship Data Sharing Rules

Account relationships and account relationship data sharing rules give you granular control over how account information is shared. They allow you to share object records related to an account, such as cases, opportunities, and contacts. The shared records don't have to be owned by a user of that account, they just have to be associated with it. You can also determine the access level granted, such as read or write.

Account relationship data sharing rules allow you to define the criteria that are used to share object records with an external account. The data sharing rule defines the relationship type, the information that is shared, and the record access given to the account that is gaining access.

Once you've created your data sharing rule, you can use it to share data with an external account by creating an account relationship. The account relationship comprises the account that is sharing information, the account that is accessing those records, and the type of relationship they have.

Go to **Digital Experiences** > **Settings** and select **Enable Account Relationships** under **Account Relationship Settings**.

Learn more about account relationships in this video.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Watch a video

SEE ALSO:

Configure Account Relationship Data Sharing Rules

Create an Account Relationship

View Shared Account Records in Your Experience Cloud Site

Considerations When Using Account Relationships and Data Sharing Rules

Configure Account Relationship Data Sharing Rules

After account relationships are enabled, set up an account relationship data sharing rule. This rule defines the relationship type, the type of information shared, and the record access granted.

Enable Account Relationships to use this feature. After you enable account relationships in your org, you can't disable it.

The following fields define your sharing rule:

Field Name	Description
Name	The name of your sharing rule. We suggest that you use something that describes the rule, such as *Lead Sharing for Vendors*.
Developer Name	API name.
Description	A summary of the sharing rule. We suggest that you include information in this description about Object Type, Account Criteria To Field, Account Relationship Type, and Access Level.
Account Relationship Type	This field defines the type of relationship between the accounts that are sharing records. This field also associates the account relationship data sharing rule with the account relationship. If the Account Relationship Type picklist doesn't contain a value that you need, you can create a picklist value from the Account Relationship object definition page.
Access Level	The level of record access granted to the account that is receiving the information. Read and Write are the only access levels available.
Object Type	The records of the object that you're sharing.
Account To Criteria Field	The field that determines how object records are shared. Use only owner and account lookup fields.
Advanced Formula	Static formula criteria that can be applied to the data sharing rule to further refine how objects are shared. When creating your static formula criteria, be sure to use the API name for any object fields that you include in the formula.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To create and manage Account Relationship Data Sharing Rules:

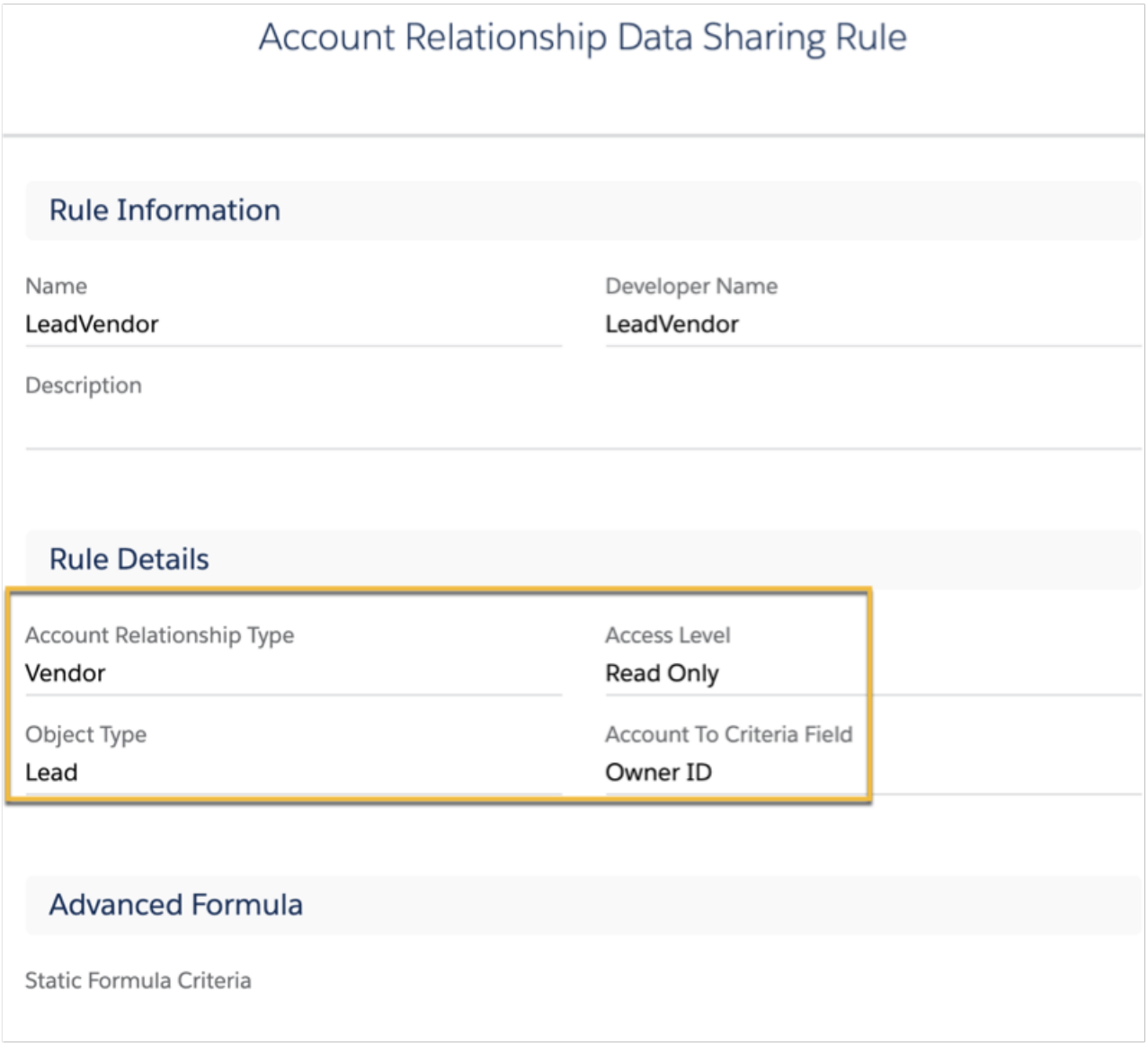
- Create and Set Up Experiences

Object Type and Account To Criteria Fields, on the account relationship data sharing rule, determine which data is shared and how it's shared. Account relationship data sharing rules can apply to; accounts, campaigns, cases, contacts, custom objects, leads, opportunities, orders, partner fund allocations, partner fund claims, partner fund requests, and partner marketing budgets.

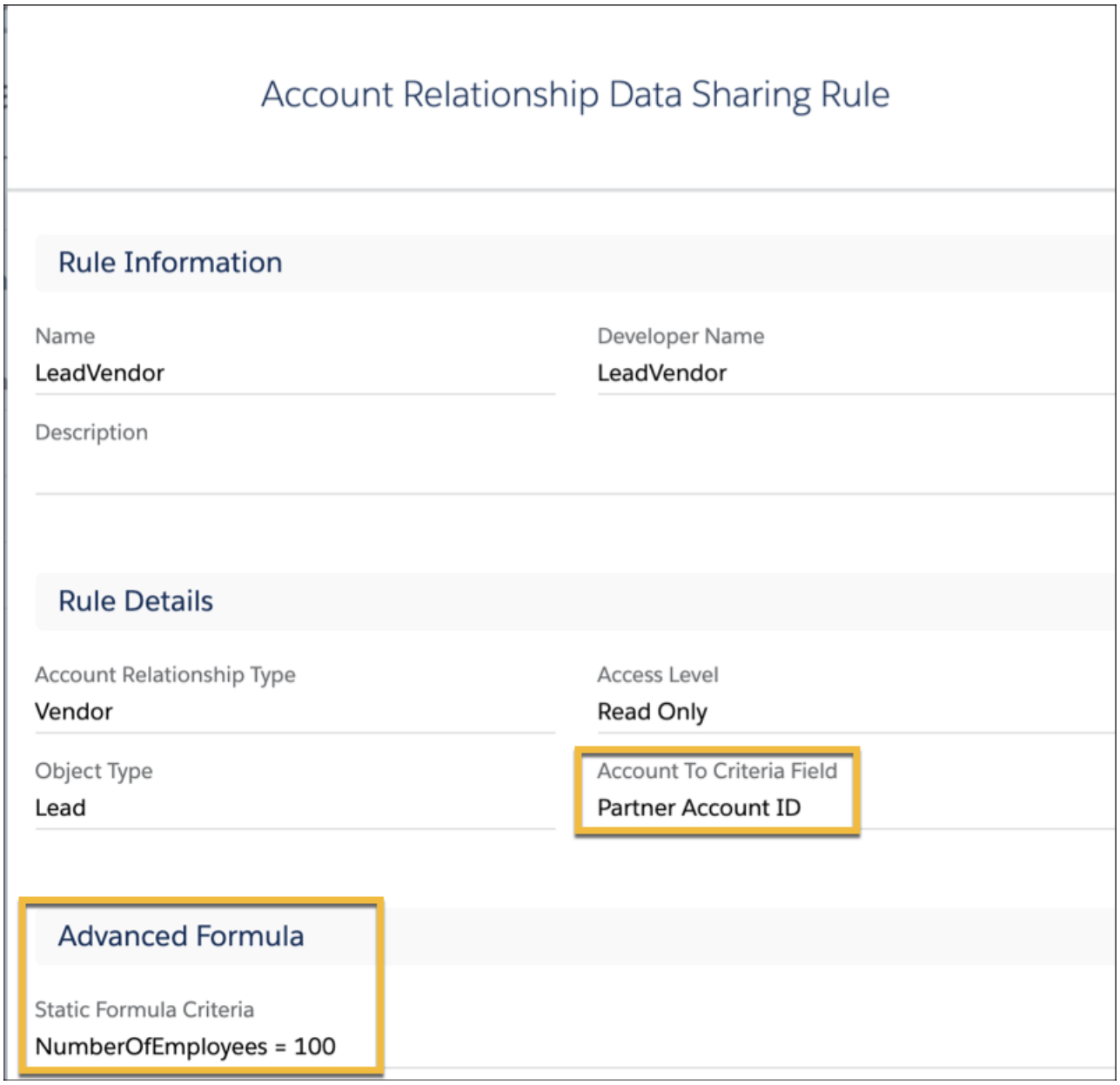
1. From Setup, enter `Digital Experiences` in the Quick Find box. Select **Digital Experiences**.
2. Click **Settings**.
3. Check **Enable Account Relationships** and save your changes.
4. Go to **Setup** and enter `Account Relationship` in the Quick Find box, then click **Account Relationship Data Sharing Rule Settings** > **New**.
5. Enter the same value in the Account Relationship Type field as the account relationship that is using this rule.
6. Specify the level of access the Account From gets to the Account To's data, in the Access Level field.
7. Search for the type of object that is being shared in the Object Type field.
8. Note: Custom lookup fields can be used in the Account To Criteria Field as long as they look up to a user or an account. If they look up to a user, then the rule applies to the specified object's records owned by the Account To's portal users. If it looks up to an Account, then the rule applies to the object's records with the Account To name listed as their account.

   Use the lookup field to select how the object is shared. For example, if Account To wants to share only their partner users' owned leads with Account From, use Owner Id in the Account To Criteria Field. If Account To wants to share all their account's leads, the Account To Criteria field value is Partner Account Id.

Example: To share all leads owned by external users of Northern Trail Outfitters with Cloud Kicks, enter the following rule. Notice that the Account To Criteria Field value is Owner Id.



Let's say you want to share leads that have Northern Trail Outfitters listed as the Partner Account Id and who have 100 employees. Change the Account To Criteria Field value to Partner Account Id and enter the advanced formula, NumberOfEmployees = 100.



Note: Don't use the following field types in static criteria fields:

- Formula
- Roll-Up Summary
- Currency
- Custom Data Type
- Text Area (Long)
- Picklist (Multi-Select)
- Standard (Id)
- Text (Encrypted)

- Custom and Standard Lookup fields that aren't required

Warning: Changing the data type of the custom fields that have been entered in the static criteria formula can corrupt your account relationship data sharing rule.

Create an Account Relationship

When you've created an account relationship data sharing rule, assign it to an account relationship to begin sharing.

The following fields define the account relationship:

Field Name	Description
`Name`	The name of the account relationship. We suggest including both account names and the type of relationship they have.
`Account From`	The account that is gaining access to another account's data.
`Account To`	The account that is giving access to their records to another account.
`Account Relationship Type`	This field defines the type of sharing rule this account relationship can access. It's the field that associates the account relationship to the account relationship sharing rule. If the Account Relationship Type picklist value that you need is not available, go to the Account Relationship Type field definition page on the Account Relationship object Settings page and create a picklist value.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To create and manage Account Relationships:

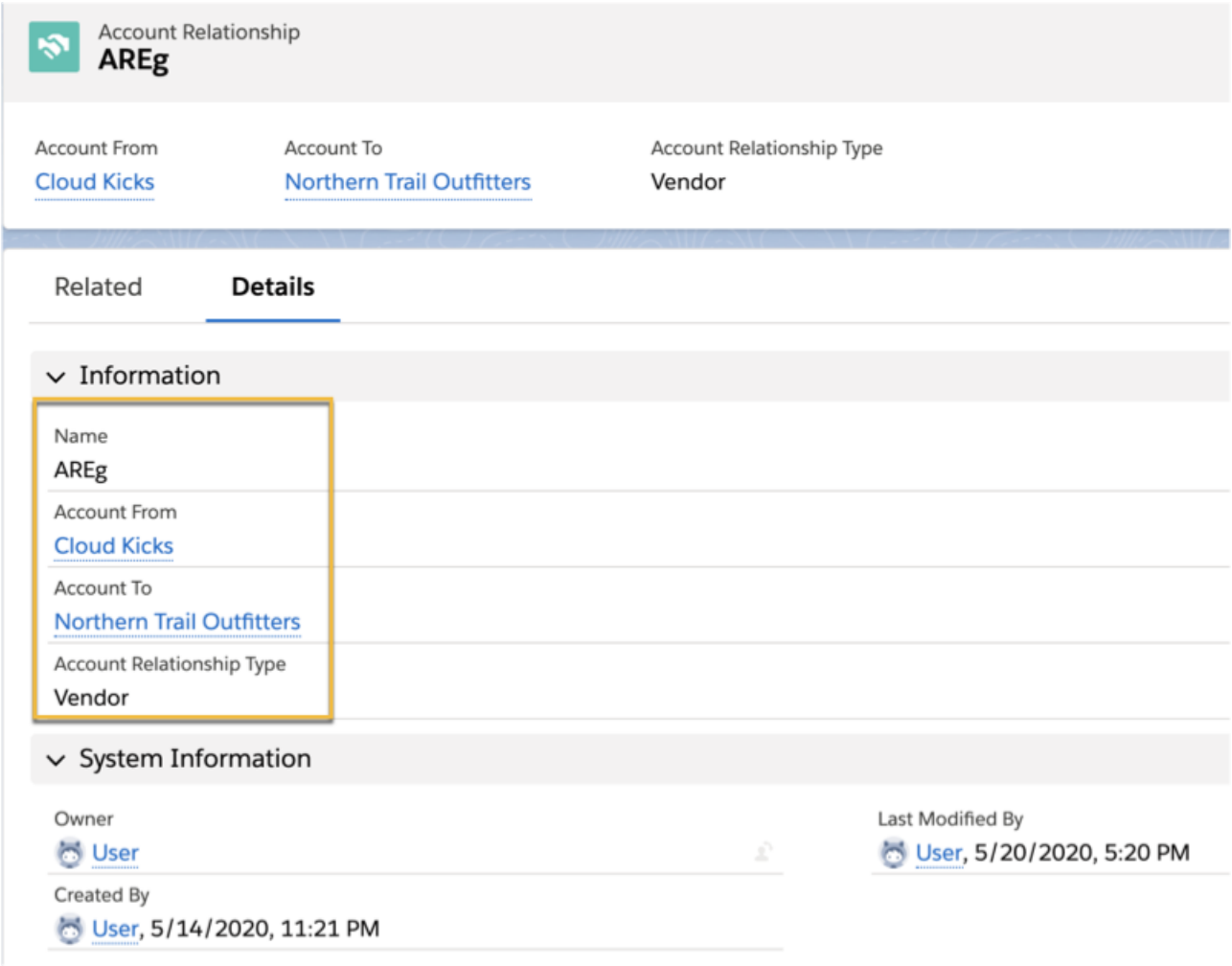
- Create and Set Up Experiences

  AND

  You must be a member of the Experience Cloud site

1. To view the accounts that are sharing data, add the Account To and Account From related lists to the Account page layout.
   a. From Setup, enter *`Account`* in the Object Manager Quick Find box.
   b. Go to **Accounts** > **Page Layouts** > **Account Page Layout**.
   c. Click **Edit** and go to the Related List tab.
   d. Drag Account To and Account From related lists to the Account page layout.
   e. Save your changes.
2. Go to a partner account, scroll to the **Account Relationship** related list, and click **New** to create an account relationship.
3. Enter the account who is sharing their data in the Account To field. Enter the account that is gaining access to the data in the Account From field. The Account Relationship Type value must match the Account Relationship Type value in the account relationship data sharing rule.

Example: If Northern Trail Outfitters wants to share their leads with Cloud Kicks, they create this account relationship.



Learn more about account relationships in this video.

Watch a video

View Shared Account Records in Your Experience Cloud Site

Once an account relationship data sharing rule is in effect, the shared information filters into the object list view of the account gaining access (Account From).

Partner Community or Customer Community Plus licenses are required to access Account Relationships and Account Relationship Data Sharing Rules.

To display this information on your partner site:

- Go to **Experience Builder** click **Navigation Menu** > **Edit Default Navigation**. Click **Add Menu Item** and enter the name of the object you are sharing, Object Type, and enter the list view you created as the default list view.

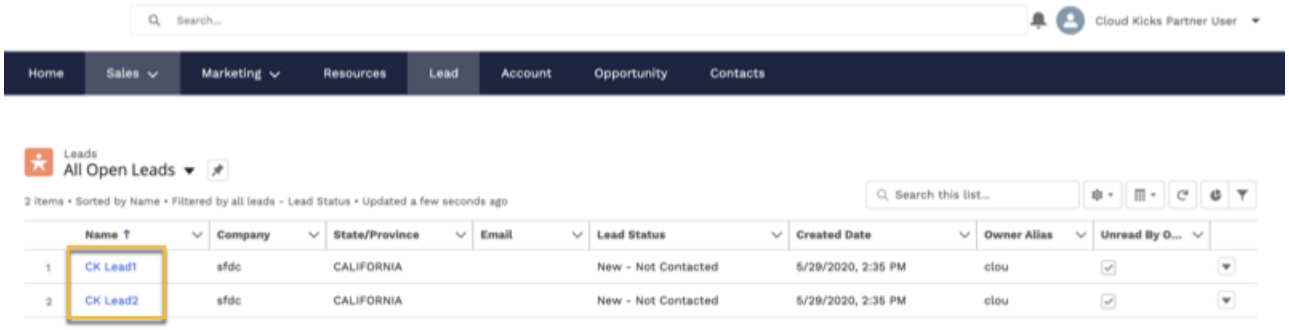
EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

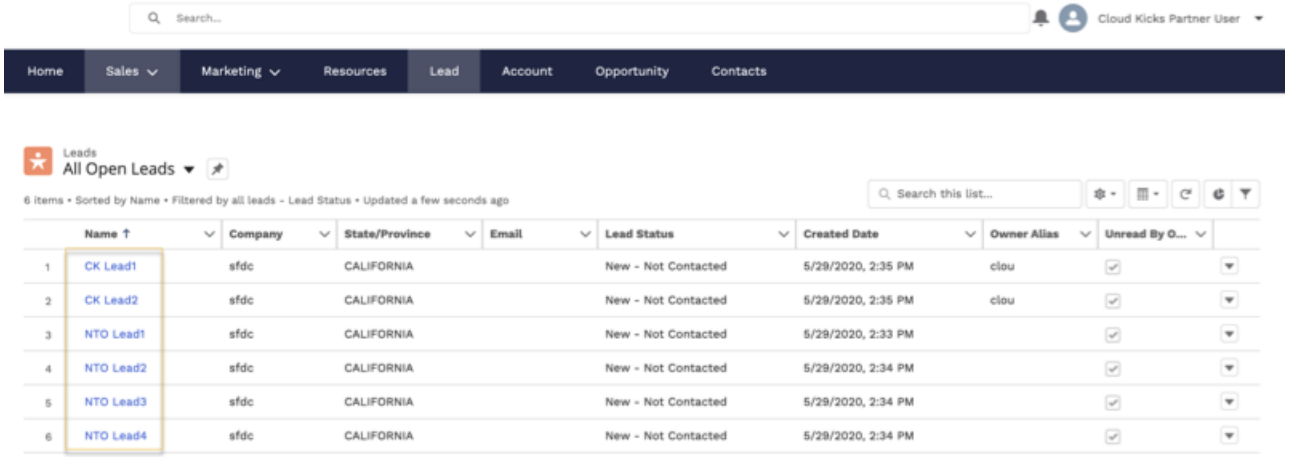
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. Create a list view for the shared object with the appropriate filters and give it a recognizable name, such as `All Open Leads`.
2. Go to **Experience Builder** click **Navigation Menu** > **Edit Default Navigation**. Click **Add Menu Item**.
3. Enter the name of the object you are sharing, Object Type, and enter the list view you created as the default list view.

Example: Before a partner account relationship was created, Cloud Kicks didn't have access to Northern Trail Outfitters leads.



Once the rule is applied, the leads that Northern Trail Outfitters shares with Cloud Kicks appear under Cloud Kicks All Leads list view.



Create Reports for Account Relationships

Create a custom report using the Account Relationship object to track your account relationships. Once you've created the report, share your information in a dashboard.

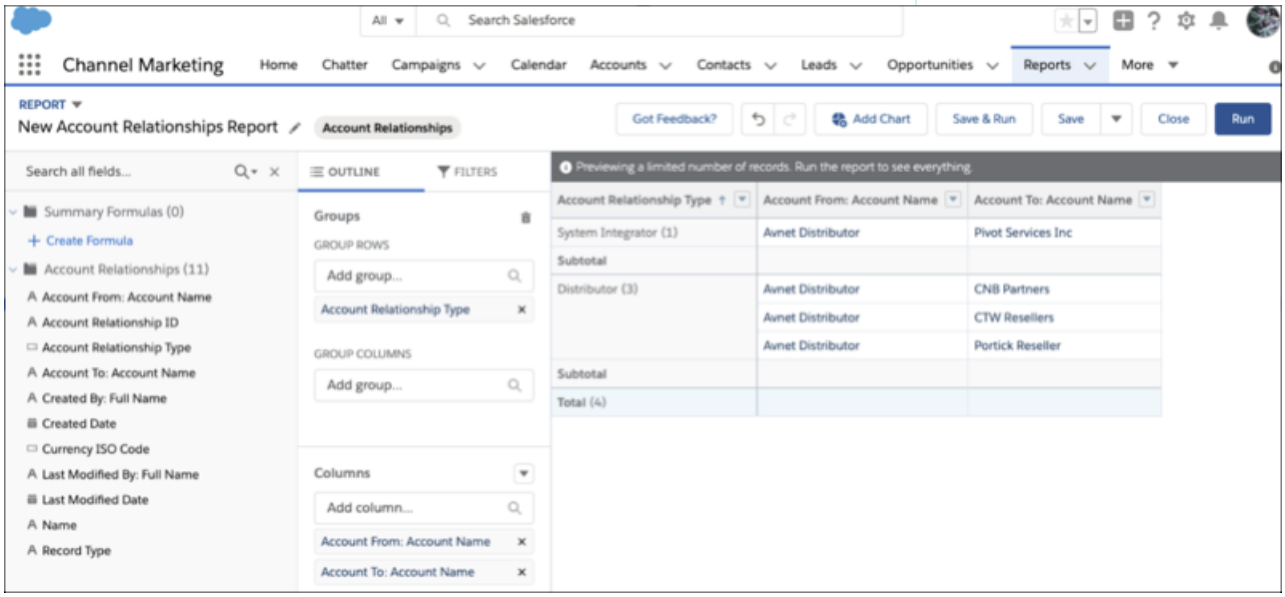
1. Create a custom report type. Select **Account Relationships** as the primary object.
2. Build your report and save it.
3. Share the report on a dashboard.

Example: Once you've created a custom report type using the Account Relationship object, you can build your report to fit your needs.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Considerations When Using Account Relationships and Data Sharing Rules

There are a few important things to keep in mind when you use account relationships or account relationship data sharing rules.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Sharing Rules follow our standard sharing rule procedures and aren't the same as account relationship data sharing rules. Sharing rules allow you to provide visibility to objects. Account relationship data sharing rules share specific object records with an external account if an account relationship is created. Deferred sharing rules don't affect account relationship data sharing rules.
- Account Relationship Types are dynamic picklist values. If the value you need isn't available, go to **Setup**, open the Object Manager tab, and enter `Account Relationship` in the quick find box. Click **Account Relationship** > **Fields & Relationships** > **Account Relationship Type** and select **New** under AccountRelationshipType Picklist Values. You can also customize an existing value. You can't replace, delete, or deactivate an Account Relationship Type picklist value used in an account relationship or account relationship data sharing rule.
- After an account relationship is saved, only its name can be updated. To make further changes, delete the account relationship and create a new one.

- Only one sharing rule can contain the same Account Relationship Type and Object Type field values. For example, you can only have one sharing rule that combines the Lead.OwnerId Object Type field value and "Distributor" Account Relationship Type field value.
- An account that is part of an account relationship can't be deleted or merged.
- If sharing isn't enabled for orders, then you can't create account relationship data sharing rules for them.
- Unmanaged packages with Namespace enabled can't contain account relationship data sharing rules that include custom objects.
- Account Relationship don't share data that is owned by a queue.
- Account relationships can't share data with accounts that use account role optimization.
- Account relationships don't share data from High Volume Portal Users.

Best Practices for Account Relationships

Looking for best practices and use cases to help you get the most out of your account relationships and account relationship sharing rules? You've come to the right place.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Account relationships only share data with Partner or Customer Community Plus users. Keep the following in mind when you use account relationships to share data:

- If possible, load your data before you set up account relationship data sharing rules. Loading data after you create account relationships and account relationship data sharing rules activates the sharing rules. Performance can be affected if large quantities of data is loaded after the rules are created. If it's necessary to load data after account relationship data sharing rules have been created, load no more than 1 million records per day.
- Create the account relationship before creating account relationship data sharing rules.
- Avoid bulk Contact reparenting operations.
- Limit updates to account relationship data sharing rules that are being used by multiple account relationships. Recalculating account relationship data sharing rules for many records can take some time. If updates to active account relationship data sharing rules are necessary, space them out to avoid performance issues. Also shared data may not be immediately available after you make the updates.
- For optimal data processing, position users who own many records at the top of an external role hierarchy.
- Before you put your account relationship data sharing rules into production, test them in a Sandbox.

When you create account relationships, keep the following Salesforce limitation in mind:

- Salesforce has a recommended limit of 50 million records for custom objects.

Tip: If you're loading more than 10 million records, contact your account executive before loading. We can help monitor your progress and assist you.

Lead Distribution and Deal Registration

Experience Cloud sites provide an incredibly robust and flexible set of tools to manage both inbound and outbound leads. Use Partner Central to implement lead distribution, lead monitoring, and deal registration with a few clicks of a button.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Lead distribution is the practice of managing and maturing both inbound and outbound sales leads with channel partners who are selling on your behalf. Many companies sell their products through partners. With the lead distribution process, companies source leads and pass them to their partners for follow-up and sales. Lead distribution is also known as lead pass.

Other companies rely on their partners to source leads and register them with the company. This process is known as deal registration. The channel manager checks in the Salesforce org to make sure that the submitted lead does not create channel conflict with other partners.

Assign Leads to Partners

You can assign leads to partners or allow partners to drive their own lead queue.

Configure Lead Distribution in Partner Central

Automatically pass on leads acquired from your web site, marketing campaigns, or referral programs using lead distribution. Partner Central lets you share a common pool of leads with your channel partners on a partner site using the lead inbox.

Configure Deal Registration in Partner Central

Deal registration programs involve resellers registering deals with their vendor. Vendors in turn provide extra margins to the reseller for providing early pipeline visibility for these deals and keeping out competitors. Once a deal is registered, other resellers or your direct sales team can't compete for the registered deal.

Assign Leads to Partners

You can assign leads to partners or allow partners to drive their own lead queue.

You can:

- **Directly assign leads**: Assign each lead to an individual partner user.
- **Configure lead distribution**: Assign leads to a lead queue and allow partner users to claim leads from the queue. The native Partner Central Experience Cloud site template provides the lead inbox component that you can use to pass leads to partners. Use lead assignment rules to automatically assign leads to partner users or queues based on certain properties of those leads.

  Note: User actions in a site don't trigger assignment rules.

- **Configure deal registration**: Allow partners to submit qualified or mature leads to get ahead of competitors.

Assigning a lead to a partner user or partner lead queue is just like assigning a lead to any other user or queue. Leads assigned directly to a user or a queue that is not part of the lead pool are shown on the site's Leads page or tab. The partner user can see leads by selecting the appropriate list view. Until a partner user has reviewed a lead, it displays in bold, and is in the My Unread Leads list view.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign leads to partner users:

- Edit on leads

Configure Lead Distribution in Partner Central

Automatically pass on leads acquired from your web site, marketing campaigns, or referral programs using lead distribution. Partner Central lets you share a common pool of leads with your channel partners on a partner site using the lead inbox.

While companies can choose to configure lead distribution in multiple ways, one approach is to create a shared queue and list view of leads, and use assignment rules to automatically pass leads to partners in the lead inbox. Use Salesforce CRM capabilities such as lead page layouts, lead record types, and assignment rules to automate the process. Partner users can accept the leads they're assigned from the lead inbox in the partner site.

Configure lead distribution for your partner site for:

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Automated routing of company-sourced leads to channel partners
- Criteria-based lead assignment
- Increased likelihood of lead conversion
- Automated handling of dead or dormant leads

Configuring lead distribution for your Partner Central site involves the following steps.

Create a Lead Process for Lead Distribution

A lead process allows you to define or customize status values or stages for leads.

Create a Queue for Lead Distribution

Create a shared queue of leads and add partners to the queue. A queue is a special type of list view that you can quickly share with multiple users, groups, and roles. In fact, creating a queue automatically creates a list view in your org. Queues and their corresponding list views both have visibility settings that allow you to share contents with partner users in your Experience Cloud site.

Create Page Layouts for Lead Distribution

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on the deal registration that the company may not wish to expose to partners.

Create Lead Record Types for Lead Distribution

Create a lead record to track sales leads that you pass to partner users. Record types help you differentiate between sales leads and registered deals, assign specific page layouts for different processes, and simplify reporting for each type of record.

Create Assignment Rules for Lead Distribution

Assignment rules allow you to automatically apply criteria to sort, queue, or act on leads. For example, use assignment rules to automatically assign leads to the lead inbox queue for Partner Central.

Customize Partner Central for Lead Distribution

Partner Central comes predesigned to support lead distribution. Verify that the Lead Inbox component works with your lead queue and list view and test the lead distribution process.

Create a Lead Process for Lead Distribution

A lead process allows you to define or customize status values or stages for leads.

Create a process called Lead Distribution and define the statuses that the lead can be in. When you select status values for a process, think of all the stages a lead goes through in the process.

Tip: To use more values than the primary process record provides, customize the Lead Status picklist values for leads before you create the lead process.

1. From Setup, enter `Processes` in the Quick Find box.
2. To create a lead process, such as for lead distribution, select **Lead Processes**.
3. Select the stages best suited to the lead and your business needs.
4. Save the process.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Create a Queue for Lead Distribution

Create a shared queue of leads and add partners to the queue. A queue is a special type of list view that you can quickly share with multiple users, groups, and roles. In fact, creating a queue automatically creates a list view in your org. Queues and their corresponding list views both have visibility settings that allow you to share contents with partner users in your Experience Cloud site.

1. From Setup, enter `Queues` in the Quick Find box, then select **Queues**.
2. Create a queue to queue leads for the lead inbox. Let's call this Lead Inbox Queue or an intuitive name of your choice.
3. On the queue detail page, under Queue Members, add the partner users you want to pass leads to. You can set the visibility settings by profiles, roles, or users.
4. Save the queue, which also creates a list view by the same name.
5. Next, go to the Leads object home in your org. From the Views drop-down list, select the list view with the same name as the queue and edit the list view.

   Note: You can't edit list views in Lightning Experience.

6. In the Step 4: Restrict Visibility section, set visibility preferences. For example, to share the queue with all partners, search by and share the list view with the All Partner Users group and save.

In Partner Central sites, you can select this list view to display in the lead inbox in your site. You can create and share multiple queues and the corresponding list views with partner users. Partner users with permissions to access leads, queues, and the corresponding list views can see all lead list views and switch between them.

SEE ALSO:

Create Queues

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create and change queues:
- Customize Application

  AND

  Manage Public List Views

To change lead list view visibility:
- Read on leads

  AND

  Create and Customize List Views

To create, edit, or delete public list views:
- Manage Public List Views

Create Page Layouts for Lead Distribution

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on the deal registration that the company may not wish to expose to partners.

Create two page layouts: one for the channel manager and partner profiles in your partner site.

1. From Setup, enter `Leads` in the Quick Find box, then select **Page Layouts** under Leads.
2. Create a lead page layout for partner users by cloning the primary lead layout. Let's call this **Lead Distribution - <User Profile>**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers see more data than partner users.
4. Save the page layout.
5. Repeat for channel manager profiles.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts:
- Customize Application

Create Lead Record Types for Lead Distribution

Create a lead record to track sales leads that you pass to partner users. Record types help you differentiate between sales leads and registered deals, assign specific page layouts for different processes, and simplify reporting for each type of record.

Note: Creating a lead record type requires a lead process and a lead page layout.

Lead distribution is used for managing outbound leads that your company passes to your partners. Deal registration, on the other hand, allows partners to submit leads early on so they can get ahead of their competition. Both channel managers and partner users see both lead record types, but channel managers typically require more visibility and control over the data. Define lead page layouts with both channel managers and partner users needs in mind. You can assign page layouts to profiles for each lead record type you create.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter `Leads` in the Quick Find box, then select **Record Types** under Leads.
2. Create a record type to track leads you pass to partners for lead distribution. Let's call this **Sales Lead**.

   For deal registration, create a separate record type called **Deal Registration**.
3. Activate the record type and assign it to the appropriate partner and channel manager profiles for your site.
4. Assign page layouts for the partner and channel manager profiles.
5. Edit the picklist values for the Lead Source record type. Include values that let you track inbound leads from deal registration (from partners) separately from outbound sales leads (passed to partners).

Create Assignment Rules for Lead Distribution

Assignment rules allow you to automatically apply criteria to sort, queue, or act on leads. For example, use assignment rules to automatically assign leads to the lead inbox queue for Partner Central.

For lead distribution, use assignment rules to define the criteria by which you want to distribute your leads, such as partner tier, geography, or specialization.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: Salesforce **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter `Leads` in the Quick Find box, then select **Lead Assignment Rules**.
2. Create a lead assignment rule, let's call this All Channel Sales Leads.
3. Create rules to filter leads by record field values or user criteria and assign them to the lead inbox queue.

   You can also create rules to directly assign leads to partner users.
4. To send an email notification when a lead is assigned to the queue, select an email template.

   You can also create custom templates for partner email notifications.

Note: Assignment rules that run after, rather than during, lead creation can't include the Campaign field in their criteria.

Customize Partner Central for Lead Distribution

Partner Central comes predesigned to support lead distribution. Verify that the Lead Inbox component works with your lead queue and list view and test the lead distribution process.

1. In your Partner Central site, go to the Home page in Experience Builder.
2. Click the Lead Inbox component and select the lead list view you want to display and link to. Configure other properties in the Property Editor.
3. To save your changes, publish the site.
4. Log in as a partner to test the lead distribution process.
   - Create a few test leads that match the assignment rules for the lead queue.
   - Make sure that the leads show up in the lead inbox queue and list view.
   - Accept a lead. Accepting a lead makes the partner the owner of the lead.
   - Verify that the lead shows up in the partners list view.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Configure Deal Registration in Partner Central

Deal registration programs involve resellers registering deals with their vendor. Vendors in turn provide extra margins to the reseller for providing early pipeline visibility for these deals and keeping out competitors. Once a deal is registered, other resellers or your direct sales team can't compete for the registered deal.

Configure deal registration to:

- Automate the submission & approval process
- Increase partner competitiveness and participation
- Provide incentives to partners for leads they convert quickly
- Get early visibility into your pipeline
- Manage channel conflict
- Monitor channel revenues both within your Experience Cloud site and in Salesforce

Here's a summary of how to configure deal registration in your Partner Central site.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Create Processes for Deal Registration

A process allows you to define or customize the stages in the sales process for leads or opportunities.

Create Page Layouts for Deal Registration

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on leads that you might not want to expose only to channel managers and not partners.

Create Lead Record Types for Deal Registration

Create a lead record type to track deals submitted by partners in Experience Cloud sites. Record types help you differentiate between sales leads and registered deals, assign page layouts for each profile for deal registration, and simplify reporting by lead record type.

Create a Global Action to Let Partners Register Deals

Create a global action to allow partners to register deals from Experience Cloud sites. Partner Central comes with a Quick Create button that you can add the global action to so partners can register deals.

Customize Opportunities for Deal Registration

Create an opportunity process, page layout, and record type, similar to leads.

Create Approval Workflows for Deal Registration

Approval workflows are unique to each organization's sales needs and business processes.

Customize Partner Central for Deal Registration

Partner Central comes predesigned to support deal registration. Use the Quick Create button to share a global action to submit registered deals. The template contains lead and deal list views for partner users.

Create Processes for Deal Registration

A process allows you to define or customize the stages in the sales process for leads or opportunities.

When you select status values for a process, think of all the stages a lead or an opportunity goes through. For example, for deal registration, the Lead Status values could be New, Submitted, Approved, Rejected.

Create a process for leads. Create a separate process for opportunities.

Tip: To use more values than the primary process record provides, customize the Lead Status picklist values for leads before you create the lead process. Also, add the Deal Registration to the Lead Source picklist values.

1. From Setup, enter `Processes` in the Quick Find box.
2. To create a process for leads, select **Lead Processes**. To create a process for opportunities, select **Sales Process** under Opportunities.
3. Select the stages best suited to the lead or opportunity and your business needs.
4. Save the process.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Create Page Layouts for Deal Registration

Use page layouts to control field visibility and behavior for different types of users and sales processes. There are likely fields on leads that you might not want to expose only to channel managers and not partners.

Create two page layouts: one for the channel manager and partner profiles in your partner site.

1. From Setup, enter `Leads` in the Quick Find box, then select **Page Layouts** under Leads.
2. Create a lead page layout for partner users by cloning the primary lead layout. Let's call this **Deal Registration - <User Profile>**, or specifically, Deal Registration - Partner Users.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for.

   Tip:
   - Extend the Lead Source picklist values to indicate which leads are submitted by partners as deals.
   - Add a custom, auto-numbering field called `Deal ID` to both partner and channel manager page layouts. You can use this field value as a separate identifier for deals, in both leads and opportunities.
4. Save the page layout.
5. Repeat for channel manager profiles.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts:
- Customize Application

Create Lead Record Types for Deal Registration

Create a lead record type to track deals submitted by partners in Experience Cloud sites. Record types help you differentiate between sales leads and registered deals, assign page layouts for each profile for deal registration, and simplify reporting by lead record type.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Note: Creating a lead record type requires you to associate it with a lead process and allow you to specify page layouts to be used with different profiles. Similarly, creating an opportunity record type requires you to provide a sales process and opportunity page layouts.

1. From Setup, enter `Record Types` in the Quick Find box, then select **Record Types** under Leads. To create an opportunity record, select **Record Types** under Opportunities.
2. Create a lead record type to track registered deals called **Registered Deal**. If you're creating an opportunity record type, create one for registered deals as well.
3. Activate the record type and assign it to the appropriate partner and channel manager profiles for your site.
4. Assign page layouts for the partner and channel manager profiles.
5. If you haven't already, edit the picklist values for the Lead Source field to include a value for registered deals.

If this is the first time you're setting up a deal registration process for your company, consider converting existing leads to the generic sales lead record type. Using separate record types for standard leads versus registered deals simplifies the reporting process.

Create a Global Action to Let Partners Register Deals

Create a global action to allow partners to register deals from Experience Cloud sites. Partner Central comes with a Quick Create button that you can add the global action to so partners can register deals.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

1. From Setup, enter `Global Actions` in the Quick Find box, then select **Global Actions**.
2. Create a global action, select **Lead** as the target object, and the record type for the deal registration process.
3. Select or specify an appropriate label for the global action. This label displays in the Create button menu in your site.
4. Fill out the other details and save the global action.
5. Customize the fields in the global action layout, based on the information you want your partners to submit for each deal.

Tip: Use a Lead Source value to indicate that the lead has been captured from the Deal Registration process.

Customize Opportunities for Deal Registration

Create an opportunity process, page layout, and record type, similar to leads.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Many companies create separate sales processes for their direct and indirect sales opportunities. Some companies prefer to expose a shorter list of opportunity stage values that are less granular compared to stages used by their direct sales team.

1. Create an opportunity process.
2. Create two opportunity page layouts, one for partner users and one for channel managers.
3. Create an opportunity record type to track registered deals, different from the opportunity record type you use to track direct sales opportunities.

Tip:

- Many companies struggle with how to report on channel versus internal sales. Using separate record types to categorize opportunities by who is working on them— internal sales teams or partners—allows you to report on direct and channel sales separately.
- Make this opportunity record type the default for partner users. This ensures they see the same record type when the opportunity is converted, regardless of who does the conversion.
- Add the Deal Registration value to the Lead Source picklist values for the opportunity record type.

4. Map any custom fields on the lead record type to the opportunity record type for deal registration.

Create Approval Workflows for Deal Registration

Approval workflows are unique to each organization's sales needs and business processes.

Approval workflows should account for how you want to route submitted deals, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you to send notifications for.
- **Routing**: Screen leads by record type and submit all registered deals for approval.
- **On Submission**: Identify what field values change on the lead record on submission, for example the lead status. Decide if the lead record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted lead to be considered for deal registration. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted deal to. Typically, this is the channel manager. Decide what happens on approval.
  - Change the Lead Status to approved.
  - Convert the lead to an opportunity.
  - Send an email notification to the partner user.
  - Set a deal expiration date and save the deal approval date for reporting.
  - Extend any margins or discounts that you might offer to the partner on successful closure.
- **Rejection**: Decide what criteria disqualify a lead. Set the Lead Status to rejected. Send an email notification to inform them of the rejection. Unlock the lead record so partners can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Customize Partner Central for Deal Registration

Partner Central comes predesigned to support deal registration. Use the Quick Create button to share a global action to submit registered deals. The template contains lead and deal list views for partner users.

1. In your Partner Central site, go to the Home page in Experience Builder.
2. Click the **Quick Create** component and add another global action. By default, a New Account action is added. Click it and select the global action you created for partners to register deals.
3. To save your changes, publish the site.
4. Log in as a partner to test the deal registration process.
   - Submit a couple registered deals from the Quick Create button.
   - In a different browser, log in to see if the approval workflows are working. Approve or reject a deal.
   - Back in the site, check the lead and deal list views as partner.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Market Development Funds

Drive demand for your products and provide incentives to partner users by offering market development funds as part of your channel marketing program. Create marketing budgets, allocate marketing funds or co-op (accrued) funds to channel partners, streamline fund requests, and process fund claims using Market Development Fund (MDF) features. Channel account managers can get a full audit of MDF activity, including fund requests and claims approval.

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

With Market Development Fund features, you can:

- Create marketing budgets
- Allocate marketing funds or co-op (accrued) funds to channel partners
- Streamline fund requests
- Process fund claims

Note: Setting up Market Development Funds is easy, using Guided Setup. Click **Experience Workspaces** > **Guided Setup** > **Market Development Fund**.

The Market Development Fund reports, available in the guided setup, make it easy to understand partner adoption, funds usage, and marketing ROI. Market Development Funds is available out-of-the-box for partner sites. We created a Budget custom report type for you. If you want to view information about allocations, requests, or claims, create report types for those objects and give partners read access to them.

Create a Market Development Budget

Channel account managers can create budgets for specific vendor groups based on location, type of funds (Market Development or co-op), or by channel programs. Using custom lookup fields, they can also associate budgets with marketing campaigns.

Configure Market Development Budgets

Configure Partner Marketing Budgets so that channel account managers can access them. Set up workflows to streamline the approval process.

Create a Partner Fund Allocation

Allocate Market Development Funds (MDF) or co-op funds to channel partners from an existing budget. Allocations are associated with budgets and channel partners to track budget usage.

Configure Partner Fund Allocations

Configure partner fund allocation for your partner site to make funds available to your partner users. Channel account managers can create and update funds and track fund activity.

Create a Partner Fund Request

Partner users can request funds before marketing a vendor's product or service. Channel account managers can approve the fund request. Fund requests are associated with channel partners, allocations, and campaigns to track how allocated funds are used.

Configure Partner Fund Requests

Configure Partner Fund Requests so that partner users can request funds for marketing campaigns and channel account managers can approve or reject the requests.

Create a Partner Fund Claim

Let partner users claim money for expenses incurred on marketing activities. Claims are associated with fund requests.

Configure Partner Fund Claims

Configure Partner Fund Claims so that partner users can claim funds for reimbursement after running a marketing campaign. Channel account managers can approve or reject the claim.

Create a Market Development Budget

Channel account managers can create budgets for specific vendor groups based on location, type of funds (Market Development or co-op), or by channel programs. Using custom lookup fields, they can also associate budgets with marketing campaigns.

If you have a Partner License and have enabled Experience Cloud sites, the Market Development Fund objects are available in your org.

1. From the App Launcher, find and open **Partner Marketing Budget**.
2. Note: Field-level security can't be used to edit standard fields on partner marketing budgets.

   Click **New** and enter the name, type, amount, and start and end dates.
3. Save the budget.

Select **Ignore Validation** to bypass validation criteria and allow more flexibility to how budgets are allocated, claimed, and requested. Ignore Validation can't be reversed after it's selected for a budget.

You can update allocations, claims, and requests for this budget. The updated values must be associated with a budget that has the same validation status as this one.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create budget
- Create on budget

To update budget
- Update on budget

Configure Market Development Budgets

Configure Partner Marketing Budgets so that channel account managers can access them. Set up workflows to streamline the approval process.

Configuring partner marketing budgets for your Partner Central Experience Cloud site involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Customize Page Layouts for Partner Marketing Budgets

Page layouts control field visibility and behavior for different types of users. Channel account managers must create and update budgets. The company may not want partner users to have access to budgets.

Grant Channel Account Managers Access to Partner Marketing Budgets

Create a permission set that gives the channel account managers Create, Read, and Update permissions on Partner Marketing Budgets.

Share Partner Marketing Budgets with the Channel Account Manager

Create a sharing rule that gives channel account managers access to budgets.

Create Approval Workflows for Partner Marketing Budgets

Approval workflows are unique to each organization's marketing needs and business processes.

Customize Page Layouts for Partner Marketing Budgets

Page layouts control field visibility and behavior for different types of users. Channel account managers must create and update budgets. The company may not want partner users to have access to budgets.

Create a partner marketing budget page layout for the channel account manager (CAM).

1. From Setup, enter `Budget` in the Quick Find box, then select **Page Layouts** under Partner Marketing Budget.
2. Create a Partner Marketing Budget page layout for channel account managers by cloning the primary partner marketing budget layout. Let's call this **Marketing Budget - CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers create and update budgets.
4. Save the page layout.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts

- Customize Application

Grant Channel Account Managers Access to Partner Marketing Budgets

Create a permission set that gives the channel account managers Create, Read, and Update permissions on Partner Marketing Budgets.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

1. From Setup, enter `Permission` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information.
4. Select the channel account manager profile for the type of user that this permission set is assigned to

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Share Partner Marketing Budgets with the Channel Account Manager

Create a sharing rule that gives channel account managers access to budgets.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

Create a sharing rule that grants budget access to internal users.

1. From Setup, enter `Sharing` in the Quick Find box, then select **Sharing Settings**.
2. Click **New** under **Partner Marketing Budget** > **Sharing Settings**.
3. Enter your rule information for your channel manager.
4. Save your sharing rule.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create sharing rules
- Manage Sharing

Create Approval Workflows for Partner Marketing Budgets

Approval workflows are unique to each organization's marketing needs and business processes.

Approval workflows should account for how you want to route submitted budgets, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you wish to send notifications for.
- **Routing**: Screen budgets by record type and submit all budgets for approval.
- **On Submission**: Identify what field values change on the budget on submission, for example the budget status. Decide if the budget record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted budget to be considered for approval. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted budget to. Typically, this is an internal user. Decide what happens on approval.
  - Send an email notification to the channel account manager.
  - Set a budget expiration date and save the budget approval date for reporting.
- **Rejection**: Decide what criteria disqualify a budget. Send an email notification to inform them of the rejection. Unlock the budget record so channel account managers can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Create a Partner Fund Allocation

Allocate Market Development Funds (MDF) or co-op funds to channel partners from an existing budget. Allocations are associated with budgets and channel partners to track budget usage.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

1. From the App Launcher, find and open **Fund Allocation**.
2. Click **New** and enter the name, budget, channel partner, and amount.
3. Save the allocation.

Allocations can be updated. The budget associated with the updated allocation must have the same validation status as the original.

Note: We've created the **Total Approved Allocations** field for you. This formula field is automatically updated.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create allocations
- Create on allocations

To update allocations
- Update on allocations

Configure Partner Fund Allocations

Configure partner fund allocation for your partner site to make funds available to your partner users. Channel account managers can create and update funds and track fund activity.

Configuring partner fund allocations for your Partner Central Experience Cloud site involves the following steps.

Customize Page Layouts for Partner Fund Allocations

Page layouts control field visibility and behavior for different types of users. Channel account managers need to create and update allocations, but the company may not wish to expose some information about allocations to partner users.

Grant Channel Account Managers Access to Partner Fund Allocations

Create a permission set to grant channel account manager permissions on Partner Fund Allocations.

Share Partner Fund Allocations with the CAM

Create two sharing rules: one for the channel account manager (CAM) and one for the partner user.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Customize Page Layouts for Partner Fund Allocations

Page layouts control field visibility and behavior for different types of users. Channel account managers need to create and update allocations, but the company may not wish to expose some information about allocations to partner users.

Create a marketing fund allocation page layout for the channel account manager.

1. From Setup, enter `Allocation` in the Quick Find box, then select **Page Layouts** under Partner Fund Allocation.
2. Create a Partner Fund Allocation page layout for channel account managers by cloning the primary partner fund allocation layout. Let's call this **Marketing Fund Allocation - CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers create and update fund allocations.
4. Save the page layout.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts

- Customize Application

Grant Channel Account Managers Access to Partner Fund Allocations

Create a permission set to grant channel account manager permissions on Partner Fund Allocations.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

Create a permission set that gives the channel account managers Create, Read, and Update permissions on Partner Fund Allocations.

1. From Setup, enter `Permission` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information.
4. Select the channel account manager profile for the type of user that this permission set is assigned to

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Share Partner Fund Allocations with the CAM

Create two sharing rules: one for the channel account manager (CAM) and one for the partner user.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

Create two sharing rules to grant the appropriate access to partner fund allocations for channel account managers and partner users.

1. From Setup, enter `Sharing` in the Quick Find box, then select **Sharing Settings**.
2. Click **New** under **Partner Fund Allocations** > **Sharing Settings**.
3. Enter your rule information for your channel manager.
4. Save your sharing rule.
5. Create a sharing rule for your partner users as well.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create sharing rules
- Manage Sharing

Create a Partner Fund Request

Partner users can request funds before marketing a vendor's product or service. Channel account managers can approve the fund request. Fund requests are associated with channel partners, allocations, and campaigns to track how allocated funds are used.

If you have a Partner License and have enabled Experience Cloud sites, the Market Development Fund objects are available in your org.

1. From the App Launcher, find and open **Fund Requests**.
2. Click **New** and enter the name, channel partner, requested amount, and status.
3. Save the fund request.

Requests can be updated. The budget associated with the updated request must have the same validation status as the original.

You can create an approval workflow for partners to submit fund requests to the channel account manager. To prevent users from manually changing the status value on records they own, make sure the "Status" field on the Request object is set to Read-only.

Note: We've created the **Total Approved Fund Requests** field for you. This formula field is automatically updated.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create fund request
- Create on fund request

To update fund request
- Update on fund request

To delete fund request
- Delete on fund request

Configure Partner Fund Requests

Configure Partner Fund Requests so that partner users can request funds for marketing campaigns and channel account managers can approve or reject the requests.

Configuring market fund requests for your Partner Central Experience Cloud site involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Grant Channel Account Managers and Partner Users Access to Partner Fund Requests

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve fund requests. Create another permission set for your partner users so they can submit fund requests.

Create Approval Workflows for Partner Fund Requests

Approval workflows are unique to each organization's marketing needs and business processes.

Customize Page Layouts for Partner Fund Requests

Page layouts control field visibility and behavior for different types of users. Partner users submit fund requests and channel account managers approve them.

Grant Channel Account Managers and Partner Users Access to Partner Fund Requests

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve fund requests. Create another permission set for your partner users so they can submit fund requests.

Create two permission sets. Grant Create, Read, Update, and Delete permissions on Fund Requests to the channel manager. Grant channel partner users Create, Update, and Read on Fund Requests.

1. From Setup, enter `Permission` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Create a permission set for the channel account manager.
4. Select the channel account manager profile for the type of user that this permission set is assigned to for one of your permission sets.
5. Create a permission set for the partner user, giving them only Create, Read, and Update access to Fund Requests.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Create Approval Workflows for Partner Fund Requests

Approval workflows are unique to each organization's marketing needs and business processes.

Approval workflows should account for how you want to route submitted fund requests, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you to send notifications for.
- **Routing**: Screen fund request by record type and submit all fund requests for approval.
- **On Submission**: Identify what field values change on the field request on submission, for example the fund request status. Decide if the fund request record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted request to be considered for approval. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted fund request to. Typically, this is the channel account manager or the financial department. Decide what happens on approval.
  - Change the Fund Request Status to approved.
  - Send an email notification to the partner user.
- **Rejection**: Decide what criteria disqualify a fund request. Set the Fund Request Status to rejected. Send an email notification to inform them of the rejection. Unlock the fund request record so partner user can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Customize Page Layouts for Partner Fund Requests

Page layouts control field visibility and behavior for different types of users. Partner users submit fund requests and channel account managers approve them.

Create two partner fund request page layouts: one for the channel account manager (CAM) and one for the partner user.

1. From Setup, enter `Request` in the Quick Find box, then select **Page Layouts** under Partner Fund Request.
2. Create a Partner Fund Request page layout for channel account managers by cloning the primary partner fund request layout. Let's call this **Marketing Fund Request- CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers approve and update requests.
4. Save the page layout.
5. Create another page layout for the partner users, keeping in mind that they submit fund requests.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts
- Customize Application

Create a Partner Fund Claim

Let partner users claim money for expenses incurred on marketing activities. Claims are associated with fund requests.

If you have a Partner License and have enabled Experience Cloud sites, Market Development Fund objects are available in your org.

Tip: Create a separate permission set for the channel account manager (CAM) or financial department to manage and approve fund claims. Partner users only need Create, Update, and Read permissions to submit a fund claim.

1. From the App Launcher, find and open **Fund Claim**.
2. Click **New** and enter the name, request, amount, and status of the claim.
3. Save the claim.

Claims can be updated. The budget associated with the updated claim must have the same validation status as the original.

Tip: You can create an approval workflow for partners to submit fund claims for reimbursement by the channel account manager or financial department. To prevent users from manually changing the status value on records they own, make sure the "Status" field on the Claim object is set to Read-only.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create claims
- Create on claims

To update claims
- Update on claims

Note: We've created the **Total Approved Fund Claims** and **Total Reimbursed Fund Claims** fields for you. These formula fields are automatically updated.

Configure Partner Fund Claims

Configure Partner Fund Claims so that partner users can claim funds for reimbursement after running a marketing campaign. Channel account managers can approve or reject the claim.

Configuring market fund claims for your Partner Central Experience Cloud site involves the following steps.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Grant Channel Account Managers and Partner Users Access to Partner Fund Claims

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve and reimburse fund claims. Create another permission set for your partner users so they can submit fund claims.

Create Approval Workflows for Partner Fund Claims

Approval workflows are unique to each organization's marketing needs and business processes.

Customize Page Layouts for Partner Fund Claims

Page layouts control field visibility and behavior for different types of users. Partner users submit fund claims and channel account managers approve and reimburse them.

Grant Channel Account Managers and Partner Users Access to Partner Fund Claims

Create a permission set for your channel account manager (CAM) or financial department so they can manage and approve and reimburse fund claims. Create another permission set for your partner users so they can submit fund claims.

Create two permission sets. Grant Create, Read, Update, and Delete permissions on Fund Claims to the channel manager. Grant channel partner users Create, Update, and Read on Fund Claims.

1. From Setup, enter `Permission` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Create a permission set for the channel account manager.
4. Select the channel account manager profile for the type of user that this permission set is assigned to for one of your permission sets.
5. Create a permission set for the partner user, giving them only Create, Read, and Update access to Fund Claims.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create permission sets
- Manage Profiles and Permission Sets

To assign permission sets
- Assign Permission Sets

Create Approval Workflows for Partner Fund Claims

Approval workflows are unique to each organization's marketing needs and business processes.

Approval workflows should account for how you want to route submitted fund claims, how you want to filter and evaluate them, and what notifications you want to send out. A few guidelines for planning your approval workflows:

- **Email Templates**: Create email templates for each stage of the approval process that you to send notifications for.
- **Routing**: Screen fund claims by record type and submit all fund claims for approval.
- **On Submission**: Identify what field values change on the field claim on submission, for example the fund claim status. Decide if the fund claim record must be locked until it is approved or rejected.
- **Evaluation**: Decide what qualifies a submitted claim to be considered for approval. Determine any thresholds, filter criteria, and stages you want to filter by.
- **Approval**: Decide who to route the submitted claim to. Typically, this is the channel account manager or the financial department. Decide what happens on approval.
  - Change the Fund Claim Status to approved.
  - Send an email notification to the partner user.
- **Rejection**: Decide what criteria disqualify a fund claim. Set the Fund Claim Status to rejected. Send an email notification to inform them of the rejection. Unlock the claim record so partner user can modify and resubmit if necessary.

For detailed instructions, see the approval workflow documentation in the Salesforce Help

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create processes:
- Customize Application

Customize Page Layouts for Partner Fund Claims

Page layouts control field visibility and behavior for different types of users. Partner users submit fund claims and channel account managers approve and reimburse them.

Create two partner fund claim page layouts: one for the channel account manager (CAM) and one for the partner user.

1. From Setup, enter `Claim` in the Quick Find box, then select **Page Layouts** under Partner Fund Claim.
2. Create a partner fund claim page layout for channel account managers by cloning the primary partner fund claim layout. Let's call this **Marketing Fund Claim- CAM**.
3. Modify the page layout to add, remove, or modify the behavior of fields, action buttons, related lists, and layouts based on who the layout is for. Typically, channel managers approve and update requests.
4. Save the page layout.
5. Create another page layout for the partner users, keeping in mind that they submit fund claims, but don't approve them.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create or customize page layouts
- Customize Application

Reach More Customers with Channel Marketing

Create seamless marketing campaigns for partner user with channel marketing tools for partner sites.

SEE ALSO:

Set Up Campaign Marketplace

Guided Setup: Distributed Marketing for Experience Cloud

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Set Up Campaign Marketplace

With Campaign Marketplace, you can provide the structure and guidance necessary for partners to successfully execute campaigns. Channel marketers can create and share marketing campaigns, guidelines, and assets with partners. They can also customize the look and feel of the marketplace and highlight information that is important to partners. Partners can then choose which campaigns work best for them. This feature is available in Experience Builder sites and Lightning Bolt Solutions.

Enable your channel marketers to promote pre-approved campaigns. Let partners browse, signup for, and run campaigns in just a couple of easy steps. When a partner clicks **Sign Up** on a campaign they want to run, a child campaign record is created from the original campaign. Partners can access all assets associated with the campaign and customize it to fit their brand. You must have a Partner Community license or use Distributed Marketing to use Campaign Marketplace.

Note: We recommend that you define your campaign hierarchy before completing these steps. Think about how you can organize your campaign hierarchy to optimize reporting on campaigns. You can organize them by channel programs and levels or you can organize them by region.

1. Go to **Customize** > **Campaigns** > **Page Layouts**.
2. Create 2 channel marketing page layouts: one for the channel marketer and one for the partner profiles in your partner site.
3. Go to **Customize** > **Campaigns** > **Record Types** and create a record type called Channel Marketing.
4. Go to **Campaigns** > **Create New View** and create a campaign list view called Campaign Marketplace.
5. Create campaigns for your partner users using the Channel Marketing record type.
6. Configure your campaign marketplace in Experience Builder.

EDITIONS

Available in: Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

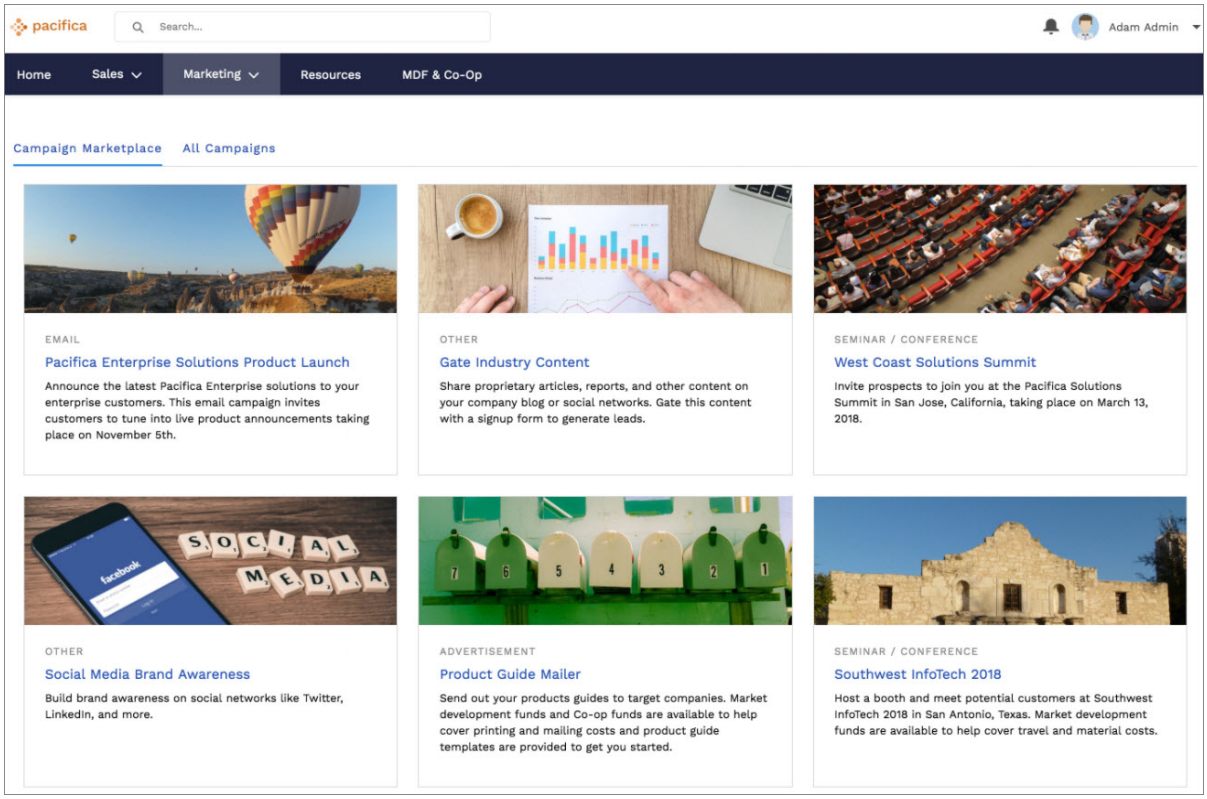
To create campaigns.
- "Create on Campaigns"

To read campaigns and use Campaign Marketplace.
- "Read on Campaigns"

To edit campaigns.
- "Edit on Campaigns"

To create or customize page layouts and record types.
- "Customize Application"

Example: Campaign Marketplace



Add filters to your list view to create different categories, such as Recommended and High ROI. Create multiple categories, and display them as tabs to make it easier for partners to search for the campaigns they need. You can also add a custom image to your campaign with the new campaign image field.

SEE ALSO:

- Best Practices for Campaign Marketplace
- Campaign Marketplace
- Guided Setup: Distributed Marketing for Experience Cloud

Best Practices for Campaign Marketplace

Looking for best practices and use cases to help you get the most out of Campaign Marketplace? You've come to the right place.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Highlighting a Custom Field

Channel managers can use Highlights to call out certain types of campaigns. Create a custom formula field for greater flexibility when choosing types of fields to highlight.

For example, you can create a custom formula text field called "Recently Added". Enter the following formula in the "Simple Formula" box:

```
IF((TODAY() - 7) < DATEVALUE(CreatedDate), "RECENTLY ADDED", "")
```

Add the “Recently Added” field to the columns in the list view you are using in your marketplace.

Under **Highlights**, select the “Recently Added” field and choose the color you want to highlight recently added campaigns.

Managing Visibility of Campaigns Using List Views

Channel managers can configure components to manage how campaigns are displayed to partners.

- Use filters to control visibility for campaigns. By default, we only show campaigns that are active and within the start and end of their date range. You can use activation or the start and end date to control visibility. Optionally add an approval process and a custom "approved" field on campaigns to control the visibility in the list view.
- Provide different types of marketplaces to partners. Add multiple marketplaces, with different list views, to different regions on a page or using the tab component.
- Hide partner-owned campaigns from the marketplace without using a trigger. You can filter the campaign list view using Owner User Type. You can also add a custom checkbox field to the campaign and set the default to "false". Make sure the field is read-only for the profiles that sign up for campaigns. You can then filter the list view by campaigns with the custom checkbox marked "true".

Copying Fields That Are Not on a Partner’s Page Layout

When a partner signs up for a campaign, fields that are not on the partner’s page layout are not copied. Use a trigger to copy fields you want to include on the child campaign when a partner signs up. These fields don’t show up in the layout, but are included in the child campaign record. We recommend using this trigger:

```
trigger onSignUpCopyFields on Campaign (before insert) {  for (Campaign childCamp :
System.Trigger.new) { // check if the campaign is being signed-up if (childCamp.parentId
!= null) { // may need to add more conditions here, depending on campaign hierarchy
and usage. // read all the campaign data that might not be on the child // sign-up/clone
doesn’t copy the fields not on the user's page layout Campaign parentCamp = [SELECT
Id, Name, Type, YourCustomFieldName__C FROM Campaign WHERE Id =: childCamp.ParentId];
YourCustomFieldName__C = parentCamp.YourCustomFieldName__C; // You can update the record
directly only before insert.
```

Note: Only fields that partners have read access to are displayed.

Signing Up for a Campaign

Partner users should default their “Actual Cost in Campaign” field to null and their “Num Sent in Campaign” field to 0 before signing up for a new campaign.

SEE ALSO:

Set Up Campaign Marketplace

Campaign Marketplace

Guided Setup: Distributed Marketing for Experience Cloud

In general, you can use the standard Distributed Marketing help and training documentation to set up, configure, and use Distributed Marketing. However, use this guide when setting up Distributed Marketing in Experience Builder instead of Lightning App Builder.

To access the Experience Builder, in Sales or Service Cloud, navigate to **Setup**. Use Quick Find to navigate to **All Communities**. Click **Builder** for the site that you're editing.

USER PERMISSIONS

To create, customize, or publish a digital experience:

- Create and Set Up Experiences AND View Setup and Configuration

Track Performance with Partner Scorecard

Channel account managers can measure partner users' performances and establish benchmarks for their channel programs using partner scorecards. You can customize partner scorecards to display any report summary results that your channel account manager or executive team wants to see. Add multiple scorecards to track more than one category. Partner scorecards are available in Lightning Bolt Solutions.

Partner scorecards are only available with Partner Community licenses. If you don't have access to scorecards, contact Salesforce Customer Support to enable Manage Scorecards in your org.

Add the "View scorecard" action to the account layout to display the scorecard directly on the account. Each scorecard displays admin-defined metrics that monitor partner performance. You can organize metrics into different categories, such as sales, marketing, and support. When you select the category you want each metric to belong to, the metrics sort into different tabs on your scorecard. Scorecards are built on top of Salesforce reports.

1. Go to **Scorecards**, and click **New**.
2. From Setup, enter `Scorecard Metric` and select **Fields**, to enter categories that you need and are not already included.
3. Go back to your scorecard and add metrics to it. Assign metrics to categories if you want to group them by KPIs.
4. Associate your scorecard with a program, level, or partner account. Once you've associated your scorecard with a program, level, or partner account, you can view the scorecard from that account. If you've organize different scorecards into tabs, you can click the tab to see the scorecard metrics associated with that category.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To manage scorecards:

- Create, Edit, and Delete on Accounts

  AND

  Create, Edit, and Delete on Reports

  AND

  Create, Edit, and Delete on Scorecards

To view scorecards:

- Read on Accounts

  AND

  Read on Reports

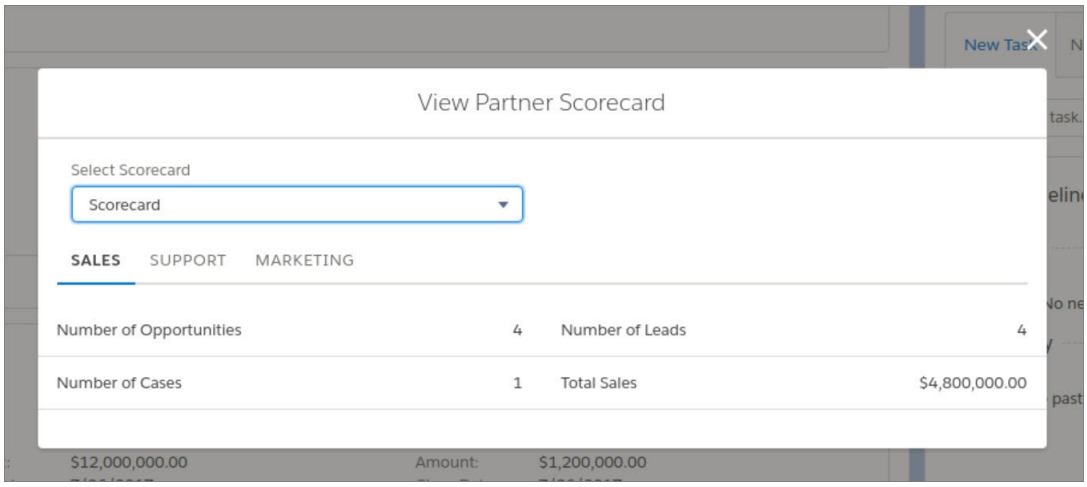
  AND

  Read on Scorecards

To view scorecard metrics:

- Run Reports

Example: Partner Scorecard for Sales



Note: Metrics are pulled from summary reports. You must have access to the reports you want to associate with scorecards. Scorecard associations are permanently deleted when an account is disabled.

See Configure Reports for Partner Scorecard for more information about setting up metrics for scorecards.

SEE ALSO:

Configure Reports for Partner Scorecard

Design the Field Layout for Reports Created from Your Custom Report Type

Build a Report

Configure Reports for Partner Scorecard

Assigning metrics to a Partner Scorecard is easy, but it's important to correctly configure the reports. Follow these tips to display accurate information in your scorecard.

Here are a few things to keep in mind regarding the reports that you associate with your partner scorecard:

- Scorecards do not support report types on Account. To display data about objects that are related to Accounts, use a report type associated with a supported object or create a custom report type that includes both Account and a supported object.
- Each Metric is pulled from a summary field of a report. For a report to work with scorecards, it can have a maximum of one summary field in addition to the row count. The summary value is what is displayed on your scorecard. Your metric must be associated with a summary report or the data does not display correctly.
- You must have read access on all reports that you want to associate and view with scorecards.
- If an account is disabled, scorecards associated that account are permanently deleted.
- Account ID fields must be available on the report. The Scorecard component dynamically filters reports to the current Partner Account.

The following table displays information about which objects Scorecards support and how to set up reports for them.

Object	Report Type	Actions to Take
Opportunity	Standard	Set Field Level Security of Partner Account to Visible for all profiles of users viewing scorecards.
Opportunity	Custom	Set Field Level Security of Partner Account to Visible for all profiles of the users viewing scorecards. Add the Partner Account ID field to the report type layout.
Lead	Standard	Set Field Level Security of Partner Account to Visible for all profiles of the users viewing scorecards.
Lead	Custom	Set Field Level Security of "Partner Account" to Visible for all profiles of the users viewing scorecards. Add the Partner Account ID field to the report type layout.
Case	Standard	No Action Necessary. Case Contact Account Id assumed to be Partner Account ID.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create, edit, and delete reports in private folders:

- Create and Customize Reports

To create, edit, and delete reports in public and private folders:

- Report Builder OR Report Builder (Lightning Experience)

Object	Report Type	Actions to Take
Case	Custom	Add the Case Contact's Account Id field to the report type layout
Partner Fund Allocation	Standard	No standard report types exist for this object.
Partner Fund Allocation	Custom	Add the Channel Partner Account ID field to the report type layout.
Partner Fund Request	Standard	No standard report types exist for this object.
Partner Fund Request	Custom	Add the Channel Partner Account ID field to the report type layout.
Custom Object	Standard	Add custom lookup field on Accounts. API name must be Scorecard_Account. Must use "(Custom Object) with Account" as report type.
Custom Object	Custom	Add custom lookup field on Accounts. API name must be Scorecard_Account. Add the Account ID field to the custom object layout.
Any Standard Object with an Account field and no Partner Account field	Standard	Scorecards do not support this type of report with default fields. Add a custom Lookup Relationship field on Accounts. The API name must be Scorecard_Account. Use "(Custom Object) with Account" as the report type.
Any Standard Object with an Account field and no Partner Account field	Custom	Scorecards do not support this type of report with default fields, unless a supported object is included in the report type. Otherwise, add a custom Lookup Relationship field on Accounts. The API name must be Scorecard_Account. Add Account Id to the report type layout.
Any other standard object	Standard	Scorecards do not support this type of report with default fields, unless a supported object is included in the report type. Otherwise, add a custom Lookup Relationship field on Accounts. The API name must be Scorecard_Account. Use "(Custom Object) with Account" as the report type.
Any other standard object	Custom	Add a supported object to the report type, or add a custom lookup relationship field on Accounts. API name must be

Object	Report Type	Actions to Take
		Scorecard_Account. Add the Account ID field to the report type layout for the custom entity

SEE ALSO:

Design the Field Layout for Reports Created from Your Custom Report Type

Enabling More Features for Partner Relationship Management

Enable more features for channel managers and sales partners. Channel managers can monitor channel business from the Channel Management Console, and access predesigned reports and dashboards for following partner activity. Channel managers can also train partners with the resources and content that drives growth for your business using Partner Enablement and In-App Guidance. Partners benefit from a slew of sales features that help them sell more efficiently. Considering enabling Einstein Lead Scoring, Einstein Opportunity Scoring, Contact Intelligence View, Lead Intelligence View, and Pipeline Inspection for partners. Plus, everyone can stay in touch easily using the PRM for Slack app.

Available for channel managers in Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, **Developer** Editions with Sales Cloud or Service Cloud. You must have at least one PRM add-on license.
Available for partners in supported Experience Cloud sites, accessed through Lightning Experience in **Enterprise**, **Performance**, **Unlimited**, **Developer** Editions with Sales Cloud or Service Cloud. A PRM add-on license is required for each partner user.

SEE ALSO:

Managing Channels

Partner Relationship Management Analytics

Enabling and Guiding Your Partners

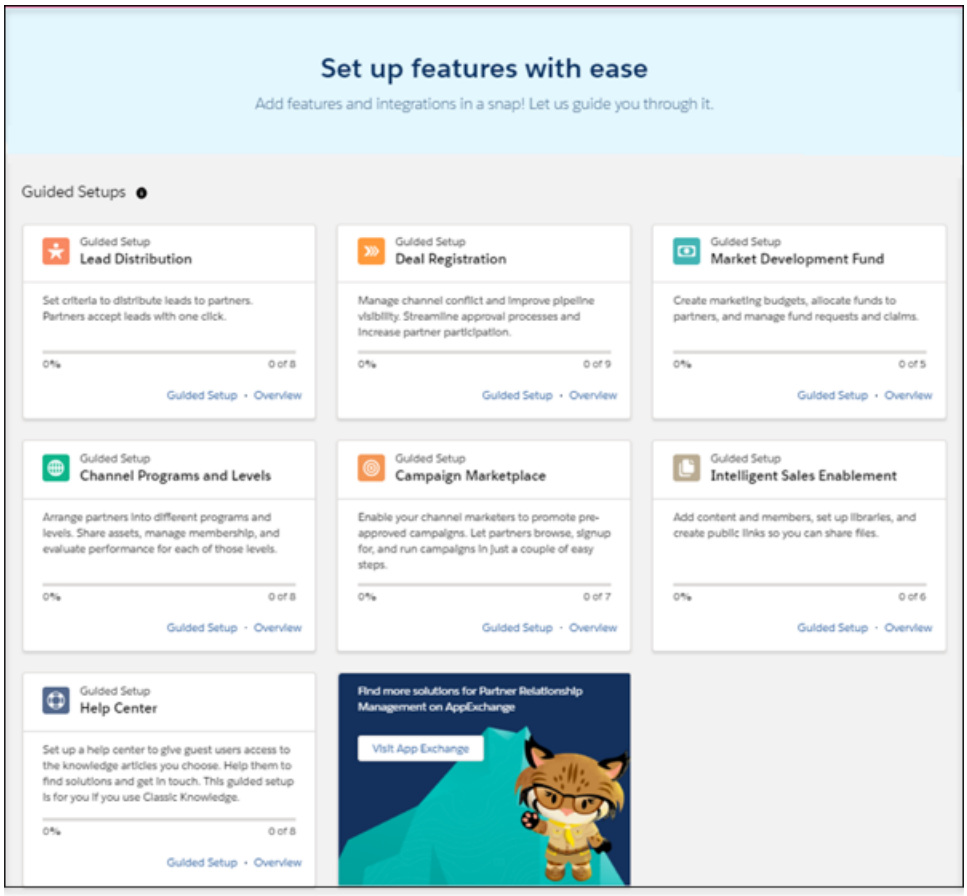
Staying Productive as a Partner

Collaborating With Partners Using PRM for Slack

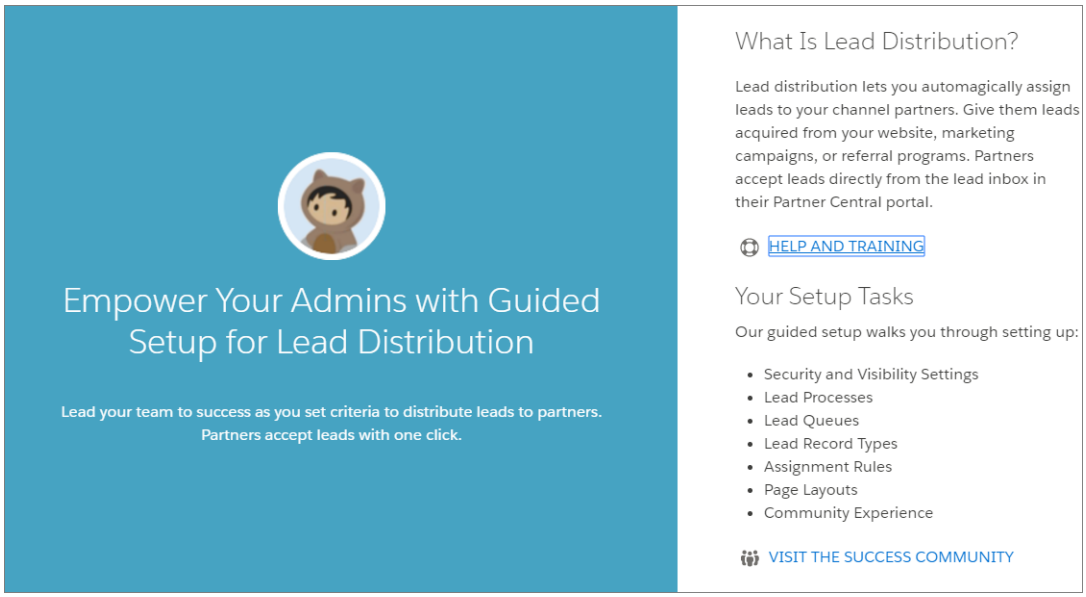
Configure Features with Guided Setup

Guided setup walks you through setting up visibility, processes, workflows, record types, layouts, and assignment rules for Salesforce features. From start to finish, guided setup leads you through each step with easy-to-follow directions and navigable links to settings pages.

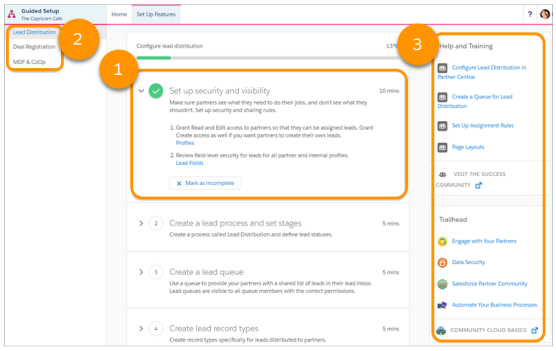
As long as you have a Partner license, you can access Guided Setup from Experience Workspaces. Click the Guided Setup tile, and select which feature you want to set up.



Click **Overview** to get a description of the feature and the setup tasks.



Click **Guided Setup** to begin setting up the feature.



1. Each setup task has been organized into a separate step. Navigable links take you to the right setup pages for completing tasks. After you complete the step, you can mark that task as complete and move on to the next.
2. Not able to finish one of the setups? Or do you want to hit pause on a setup and move on to the next one? Not a problem. You can easily switch between setups from the upper left corner of the Guided Setup page. Any completed steps remain marked until you come back to them, so it's easy to find your place again.
3. Need a bit more information about a process or step? Want to learn more? Salesforce Help, a link to the Trailblazer community, and related Trails are easily accessible on the right side of the screen.

Configure Guided Setup Reports

Additional configuration is required once you've installed your Guided Setup reports.

Once you've installed reports from the Guided Setup, filter values must be added to some reports. Check the filters on your reports to ensure that they are set correctly.

1. From the App Launcher, find and open **Reports**.
2. Click **All Folders** and select the report folder.
3. Select the report you want to customize and click **Edit**.
4. Make any necessary changes and save.

If you want to remove any of the reports or folders from your organization, you must manually delete them.

Tip: Don't forget to also delete the custom report type for any reports that you decide to remove from your org.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To delete reports in My Personal Custom Reports folder
- Create and Customize Reports

To delete reports in public folders
- Manage Public Reports

Lead Distribution Reports

These reports are provided in the **Lead Distribution Reports** folder.

Report Name	Description	Additional Customization
Unassigned Leads	Number of unassigned partner leads.	Replace lead owner ID filter with the queue record ID.

Report Name	Description	Additional Customization
Unassigned Leads by Age	Displays unassigned leads by age.	• Replace the lead owner ID filter with the queue record ID • Add the Lead Age formula field: ROUND(NOW()-CreatedDate, 0)
Lead Creation Trend	Number of partner leads created.	Replace the lead owner ID filter with the queue record ID
Leads by Partner	Number of leads owned by partner.	Tip: Add an age filter to Leads
Leads by Stage	Displays partner leads by stage.	N/A
Leads by Source	Displays partner leads by channel.	N/A
Leads by Region	Displays partner leads by region.	N/A
Leads with No Activity	Displays partner leads with no activity by timeframe.	N/A

Deal Registration Reports

These reports are provided in the **Deal Registration Reports** folder.

Report Name	Description	Additional Customization
Number of Approved Deals by Month	Number of approved deals for current fiscal year by month.	Update the lead source and lead status filters with the correct filter values
Approved Deals by Value	Total value of approved deals.	Update lead source and lead status filters with the correct filter values
Approved to Converted Ratio	Ratio of deals approved to deals converted for the current fiscal year by partner.	N/A
Closed Deals by Partner	Displays the value closed deal registered by partners.	N/A
Deals Registered by Age	Displays registered deals by age.	Add Age custom field
Deal Registration Trend	Displays deal registration over time.	Update lead source and lead status filters with the correct filter values
Deals Expiring Soon	Displays registered deals that expire in the next 30 days.	• Update lead source filter with the correct filter value

Report Name	Description	Additional Customization
		• Add Expiration date field and a filter (f.i.: Next 7 days)
Deals Pending Approval	Number of deals pending approval.	N/A
Rejected Deal	Number of deals that have been rejected.	Update lead source filter value
Converted Deals with No Activity	Number of deals registered with no partner activity in the last 14 days.	Update lead source filter value
Top Active Deals	Most valuable converted deals that have not yet been closed.	Update lead source filter value

Market Development Fund Reports

These reports are provided in the **Market Development Fund Reports** folder.

Report Name	Description	Additional Customization
Total Budget	Amount of total marketing budget.	N/A
Total Budget Allocated	Total budget allocated to partners.	N/A
Fund Requests Approved/Rejected	Total approved and rejected fund requests.	N/A
Fund Claims Approved/Rejected	Total approved and rejected claims.	N/A
Total Funds Paid	Total paid claims.	N/A
Budget Remaining	Amount of budget available.	N/A
Funds Remaining	Amount of allocated funds available.	N/A
Fund Requests in Draft	Number of fund requests in draft status.	N/A
Fund Requests Approved/Rejected	Displays fund requests by approved or rejected status.	N/A
Fund Request Submit Trend	Number of fund requests submitted.	N/A
Fund Requests By Activity Type	Number of approved fund requests by activity.	N/A
Fund Requests By Activity Type (value)	Number of approved fund requests by activity type (value).	N/A
Fund Claims in Draft	Number of fund claims in draft status.	N/A
Total Funds Claimed	Displays fund claims that have been approved.	N/A
Funds Used vs. Allocated By Fund Type	Displays funds used vs. funds allocated by type.	N/A
Funds Used vs. Allocated By Budget	Displays funds used vs. funds allocated by budget.	N/A

Report Name	Description	Additional Customization
Funds Used By Partners	Displays requested funds vs. allocated funds by partner.	N/A

Manage Customer Relationships with Experience Cloud

Give your customers a private and secure place to access and update their account information with the Customer Account Portal solution from Experience Cloud. Improve customer relationships and decrease service costs by allowing customers to see and pay invoices. They can also update their account information and search your knowledge base for answers to their most frequently asked questions.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Customer Account Portal is designed with account management in mind, so you can:

- Give access to customers to create and update vital information in any Salesforce record, including custom objects. As a result, reduce call center calls for easily resolved issues, like updating a phone number or address.
- Integrate and expose data and processes from third-party systems, like ERP and ecommerce, via Salesforce Connect.
- Show customers information that matters the most in their member profile, and let them update their accounts on the fly.
- Use Salesforce Knowledge to give customers answers to their most pressing questions about your product and brand.

Customer Account Portal has the same flexibility and extensibility that you're accustomed to with other Lightning sites, so you can:

- Build custom pages and use custom branding.
- Expose more CRM objects and data that suit your business needs.
- Use audience targeting by geolocation, and create personalized content for customers by their geographical location.

Example: Here are a few industry examples of how a company can use Customer Account Portal to enhance customer relationships.

- A utilities company allows customers to check their bills and pay them online.
- An insurance company lets clients file claims online.
- A university makes it easy for students to sign up for classes online.

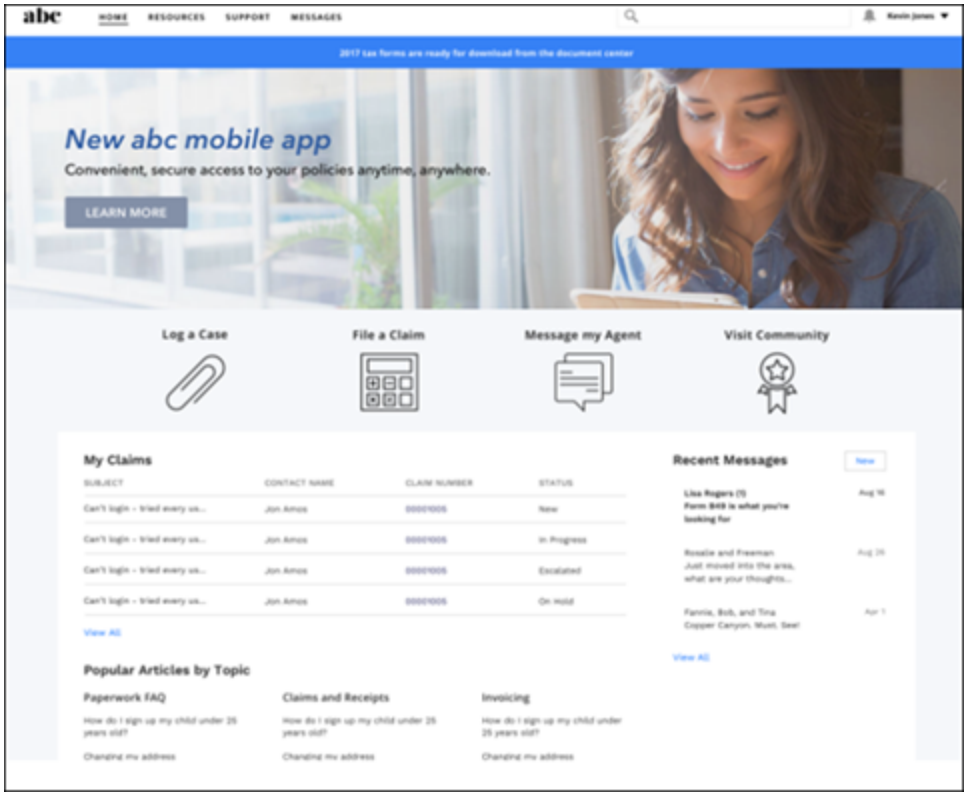
Build a Portal with the Customer Account Portal Solution

Set up a custom space where your customers can take care of their needs on their own, and reduce support calls to your company. Admins can set up Customer Account Portal with a few clicks.

USER PERMISSIONS

To create, customize, or publish an experience:

- Create and Set Up Experiences AND View Setup and Configuration



The Customer Account Portal comes with a variety of components out-of-the-box to make your company's portal a personalized point of access to information, processes, and experts:

- Use the Tile Menu on page 341 for an intuitive and visually stunning navigation experience.
- Configure the Member Profile on page 304 component to give customers all their account information and settings in one convenient place.
- Give access to your company's knowledge base to answer your customers' most frequently asked questions

Get started with this handy list of setup tasks to create your own customer account portal.

Create a Customer Account Portal—Setup Tasks

Review this high-level list of tasks and considerations for prepping and setting up your portal.

Planning	• What's Your Customer Account Portal Strategy? • Extend Salesforce to Customers with the Correct Licenses • Experience Builder Site Limitations • Communities and Community Users in Your Salesforce Org	Prep Your Salesforce Org for a Customer Portal	• Create Experience Cloud Site Users • Super User Access • Delegated Administration

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Set Up a Customer Account Portal	• Update Org-Wide Settings • Create an Experience Cloud Site • Add Salesforce CRM Data to LWR or Aura Sites	Advanced Features	• Community Moderation • Configure Dashboards to Monitor Your Site • Create Pages and Groups Targeted at Specific Audiences
Site Design	• Customize Your Experience Builder Site • Customize Experience Builder Site Pages and Components • Customize Site Navigation • Which Components Can I Use with Customer Account Portal? • Custom Theme Layouts	Reporting	• Experience Cloud site reports • Custom Reports • Report Management for Partners • AppExchange Reporting Packages for Experience Cloud Sites • Google Analytics™

What's Your Customer Account Portal Strategy?

The type of customer account portal you create depends on your business needs and what you want to accomplish. For example, an insurance company has a different strategy from a clothing retailer.

To get the most out of your Customer Account Portal implementation, ask yourself some questions.

- How many Customer Community licenses do I need? Do I invest in Customer Community licenses or Customer Community Plus licenses?
- What level of data visibility and privacy do I need for each object that I'm exposing to my customers?
- Which objects do I grant permissions to in my customer profiles?
- Do I want to allow my customers to self-register?

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

SEE ALSO:

Experience Cloud User Licenses

Extend Salesforce to Customers with the Correct Licenses

Buy customer licenses to enable customer-specific functionality in your org. Customer licenses are required to give access to the Customer Account Portal and set up customer users.

When you buy customer licenses, the following functionality is enabled in your org.

- The default Customer Community profile. You can clone it to create custom customer profiles or extend data access via permissions sets.
- The **Enable as Customer User** button on contacts.
- Access to delegated admin, reports and dashboards, and advanced sharing for customer users.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Check out Experience Cloud Sites and Users in Your Salesforce Org, a quick video about how Salesforce Experiences live in an org, the differences between licenses, and how Salesforce accounts and site users are associated with one another.

Experience Cloud and Marketing Cloud Integration with Journey Builder

With the Marketing Cloud Journey Builder, create personalized journeys for your site based on triggering events or geared for specific audiences. Greet new users with rich content emails, send reminders to users who need profile pics, or schedule follow-up emails for users who log a case. To use this feature, you must have both Experience Cloud and Marketing Cloud licenses.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note: This feature passes member information, including email addresses, from the Experience Cloud to the Marketing Cloud.

Trigger a personalized journey with events, or choose a specific audience.

Examples of events include:

- User joins a site
- Case creation
- User buys a product (depending on configuration)
- New Chatter group membership
- New Chatter post creation
- Chatter question and answer activity
- Create or update any custom object and most standard objects

Examples of audiences include:

- All users of the site
- Users who own a certain product (depending on configuration)
- Users with the highest number of reputation points
- Users who belong to the same Chatter group
- Users who haven't contributed in the last number of days

The two clouds integrate through Marketing Cloud Connect (available on AppExchange). When it's set up, you're ready to go. The process and email creation is all handled in Journey Builder. The See Also links guide you to those steps.

A few things to do and consider before you get started:

- Make sure that you have both Marketing Cloud and at least one site set up.
- Install the Marketing Cloud Connect package.
- Decide whether to use contact or user data.

Note: Adding users to a community is slower when triggering journeys. If you're adding lots of new users, like more than 1,000, at once, we suggest letting Journey Builder run overnight.

Experience Cloud Journey Data Model

When you create an Experience Cloud journey, you choose whether to add user or contact data. To avoid unintentionally sending emails to people who have opted out, you must stay consistent. There are also some event trigger and tracking limitations.

Email Preferences

The Unsubscribe link at the bottom of a Marketing Cloud email opts the person out of all further emails from that instance of Marketing Cloud. If you want users to be able to unsubscribe from site emails without unsubscribing from other brand or company emails, some setup is required.

Triggering Journeys Based on Events

You can trigger journeys based on an event that happens in the site, like when members join.

Triggering Journeys Based on Audiences

You can select a set of users—an audience—and put them into a journey. Your audience can be specific and include, say, a user who purchased a certain product and posted within the last 30 days.

Determine If an Object Can Trigger Journeys

Before you create an event-based journey, check that the object you want to use works. This test helps you identify available objects.

Sync an Object to the Marketing Cloud

To create an audience-based Journey, sync object data to the Marketing Cloud.

Experience Cloud Objects for Creating Member Journeys

Most, but not all, Experience Cloud objects can be used for creating journeys. This list includes the available objects along with a description, their eligibility status, API object, and use cases (as appropriate).

SEE ALSO:

Connect the Clouds

Journey Builder

Get Started With Journey Builder

Experience Cloud Journey Data Model

When you create an Experience Cloud journey, you choose whether to add user or contact data. To avoid unintentionally sending emails to people who have opted out, you must stay consistent. There are also some event trigger and tracking limitations.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Every external site member has both an associated user object and a contact object. Internal site users, including employee site users, typically have only the user object. The email preferences for the user and contact records aren't linked. A person who opts out of a contact record journey still gets email from user record journeys. A best practice is to choose one data type and stick to it.

A couple of other points to consider when picking the data model:

- Some events can trigger only user-based journeys. When you create a journey for a given event, the application shows you whether you can add user, contact, or either record to the journey. For many common community objects, only the user record is available. If you plan to standardize on contacts, use audience-based journeys instead as they can use either the user or contact records.
- Emails sent by journeys that are based on contact records are logged on the contact objects in Salesforce. Logging isn't always the case for journeys based on user records. If tracking is important, go with contacts.

SEE ALSO:

Triggering Journeys Based on Audiences

Triggering Journeys Based on Events

Email Preferences

The Unsubscribe link at the bottom of a Marketing Cloud email opts the person out of all further emails from that instance of Marketing Cloud. If you want users to be able to unsubscribe from site emails without unsubscribing from other brand or company emails, some setup is required.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note: Email preferences aren't automatically synced between Experience Cloud and Marketing Cloud without customization. Consider discussing implementing a custom subscription center with your integrator or Salesforce services.

The controls for system-generated emails from a site, like comment notifications, are managed within the site by users, not within Marketing Cloud.

Triggering Journeys Based on Events

You can trigger journeys based on an event that happens in the site, like when members join.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

For an event to trigger a journey, the object that the event happens to must be workflow-enabled. Most standard objects in Salesforce (such accounts, leads, case, and opportunity), all custom objects, and many community-specific objects are workflow enabled. Some site-specific objects, however, aren't.

Note: As a best practice, create sample journeys to make sure that the objects you want to use can trigger a journey and the data is accessible.

SEE ALSO:

- Experience Cloud Objects for Creating Member Journeys
- Determine If an Object Can Trigger Journeys
- The Salesforce Data Event
- Salesforce Experience Cloud

Triggering Journeys Based on Audiences

You can select a set of users—an audience—and put them into a journey. Your audience can be specific and include, say, a user who purchased a certain product and posted within the last 30 days.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

To define the audience, you select the users using either SQL in Automation Studio or Audience Builder. Make sure that Marketing Cloud can access the data tables. In core Salesforce, the tables must be replicated and synced to Marketing Cloud as a Synchronized Data Source within Contact Builder. This process assisted by the Marketing Cloud Connect package, but it's not automatic. You must choose which tables you want to sync and the object must be replicable.

Note: After object data is synced into Marketing Cloud, you can use the data to make decisions at junction points in a journey. Such junctions are known as decision splits.

SEE ALSO:

Sync an Object to the Marketing Cloud

Automation Studio

Audience Builder

Configure a Decision Split

Interact with Synchronized Data Sources

Determine If an Object Can Trigger Journeys

Before you create an event-based journey, check that the object you want to use works. This test helps you identify available objects.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

1. In Marketing Cloud, create a journey.
2. Drag the **Salesforce Data Event** tile onto the canvas.
3. To configure the event, click the icon.
4. Select **Salesforce Data**.
5. In **Select an Object**, look for the object you're interested in. If you don't see an object, it can't be used to trigger a journey.

Sync an Object to the Marketing Cloud

To create an audience-based Journey, sync object data to the Marketing Cloud.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

1. In Marketing Cloud, go to **Audience Builder** > **Contact Builder**.
2. Click **Data Sources**.
3. Click the Synchronized tab.
4. Select the data source.
5. Click **Set Up Object**.
6. Look in the **Synchronize Entity** dialog box with the list of objects that can sync. If you don't see the object, it can't be synced.
7. Click **Synchronize** for the entity that contains the data you want to bring into Contact Builder.
8. Select the checkboxes next to the fields you want to synchronize and click **Next**.
9. Using the **Record Collection** buttons, choose whether to bring in all records or begin at a certain date.
10. From the **Poll Schedule** dropdown, choose how often you wish to synchronize data.
11. Click **Save & Synchronize**.

Experience Cloud Objects for Creating Member Journeys

Most, but not all, Experience Cloud objects can be used for creating journeys. This list includes the available objects along with a description, their eligibility status, API object, and use cases (as appropriate).

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

A quick note about object status:

- If you want to create an event-based journey, the object must be workflow-enabled.
- To create an audience-based journey, the object must be replicable.

Object	Description	Status	API	Example Use Case
Sites and Membership				
Network	A site and its settings	• Not Workflow-enabled • Not Replicable	Network	
NetworkMember	Individual user memberships	• Workflow-enabled • Replicable	NetworkMember	Triggers when a new member joins the community
NetworkMemberGroup	List of profiles and permission sets added to a site (not related to Chatter groups)	• Not Workflow-enabled • Not Replicable	NetworkMemberGroup	
Chatter Groups				
CollaborationGroup	A Chatter group	• Workflow-enabled • Not Replicable	CollaborationGroup	
CollaborationGroupMember	Member of a Chatter group	• Workflow-enabled • Replicable	CollaborationGroupMember	Triggers when a user joins a Chatter Group in the Community
CollaborationGroupFeed	A single item on a Chatter group feed	• Not Workflow-enabled • Replicable	CollaborationGroupFeed	
Feeds				
FeedItem	Entry in the feed	• Workflow-enabled • Replicable	FeedItem	Triggers when user asks a question or makes another type of feed post
FeedComment	Comment added to a feed by a user	• Not Workflow-enabled	FeedComment	

		• Replicable		
Topics				
Topic	A topic	• Workflow-enabled • Replicable	Topic	
TopicAssignment	Relationship between a topic and an entity	• Workflow-enabled • Replicable	TopicAssignment	Triggers when a user posts a question on a specific topic, or adds a topic to any FeedItem
EntitySubscription	Subscription for following a record or another user	• Not Workflow-enabled • Replicable	EntitySubscription	Triggers when a user follows a topic, user, or record
Cases				
Case	Service case	• Workflow-enabled • Replicable	Case	Triggers when a user opens or updates a case

Secure Your Experience Cloud Site

You can help keep your Experience Cloud site more secure by enabling clickjack protection, authenticating users, encrypting data, and protecting against malicious resources and vulnerabilities in components using CSP and Lightning Locker. These options allow you to maintain the security of your site while still using the external sources you need. In addition, you can use various settings and permissions to protect your data and your customers' data, and publicly share the site with guest users.

Share CRM Data in an Experience Cloud Site

Sharing CRM data in an Experience Cloud site can seem like a daunting task. You need to consider the various layers of sharing data in an internal Salesforce org, and then add the extra security layers included in a portal or community implementation. Here's a cheat sheet of all the resources you need when setting up data sharing for your Experience Cloud site.

Enable Clickjack Protection in Experience Cloud Sites

Clickjacking is a type of attack that tricks users into clicking something, such as a button or link, because they perceive it to be safe. By creating hidden iframes pointing to your Experience Cloud site pages, hackers can entice users to click an element that appears to be on a different web page. But instead of the visible element handling the click, the click is hijacked and some element of the invisible site iframe on top receives it. Clickjacking can potentially lead to data intrusion, unauthorized emails, changed credentials, or other malicious site-specific results. With clickjack protection, however, you can secure your site by controlling whether browsers allow frames pointing to your pages.

Authenticate Experience Cloud Site Users

You have several options for authenticating customers and employees in your Experience Cloud site. Customers are users with Community, Customer Portal, External Identity, or partner portal licenses. By default, they can log in with the username and password that Salesforce assigns them for the Experience Cloud site. Your Salesforce org's employees are users with full Salesforce licensing capabilities. These users follow the employee login flow using their Salesforce username and password. Beyond these default settings, you can configure SAML, third-party authentication providers, or OAuth to authenticate and authorize all users accessing your site. You can also configure self-registration to use Login Discovery, which makes it easier for users to authenticate.

Encrypt Experience Cloud Site Data

You can add a measure of security to your Experience Cloud sites by encrypting files, attachments, and supported fields.

CSP and Lightning Locker in Experience Builder Sites

Experience Builder sites use Content Security Policy (CSP) and Lightning Locker to secure your site from malicious attacks and custom code vulnerabilities. CSP is a W3C standard that controls the source of content that can be loaded on your site's pages and helps protect against cross-site scripting (XSS) attacks. Lightning Locker is a Salesforce architectural layer that allows third-party Lightning components and custom code to run safely on the same page in the browser. With different levels of security, you can optimize your site security choices and tolerance for risk.

Experience Cloud Cookies

Experience Cloud uses cookies to improve functionality and accelerate processing times. By saving a user's settings, cookies can enhance the user's experience and the performance of the Experience Cloud site.

Show Nicknames Instead of Full Names in an Experience Cloud Site

Enabling nickname display in your Experience Cloud site allows more privacy and protects member identities. This protection is especially helpful in a public site where unregistered visitors can access member profiles.

Securely Share Your Experience Cloud Sites with Guest Users

Experience Cloud sites help you connect with customers and partners. When building your site, you can use various settings and permissions to protect your data and your customers' data, and publicly share the site with guest users. Keeping your data secure is a joint effort between you and Salesforce.

Share CRM Data in an Experience Cloud Site

Sharing CRM data in an Experience Cloud site can seem like a daunting task. You need to consider the various layers of sharing data in an internal Salesforce org, and then add the extra security layers included in a portal or community implementation. Here's a cheat sheet of all the resources you need when setting up data sharing for your Experience Cloud site.

Before implementing your site, familiarize yourself with how Experience Cloud sites coexist in a Salesforce org. Check out this video information:

- Experience Cloud Sites and Users in Your Salesforce Org

Warning: In Salesforce orgs created before February 8, 2024, enabling digital experiences automatically extends access to external members. Records previously accessible to Roles and Subordinates are available to Roles, Internal and Portal Subordinates. Opening up access to the site and portal subordinates could expose your org's data to external users. To secure your sites, use the Convert External User Access Wizard to help ensure that no records or folders are shared with external users. For more information, see Use the Convert External User Access Wizard.

In orgs created on February 8, 2024 or later, access is secure by default. Records shared with the Roles and Internal Subordinates group through sharing rules or other mechanisms remain accessible only to internal users.

Another important concept is that the type of license your users have affects the types of sharing available to them. Based on the licenses used to access an Experience Cloud site, users have standard or simple sharing capabilities.

Standard sharing refers to all the sharing mechanisms available to internal Salesforce org users, plus various sharing mechanisms that come with Experience Cloud licenses (sharing sets, share groups, super user access). Standard sharing is available to Customer Community Plus and Partner Community licenses.

Simple sharing means that users don't have access to roles and sharing using the role hierarchy, and is normally employed in sites with a high volume of users. Simple sharing is available to Customer Community license holders. For more information about what's included in the various licenses, check out Experience Cloud User Licenses.

Resources for Sharing and Security
Org-Wide Defaults
Salesforce Org Resources • **Video** – Who Sees What: Organization Wide Defaults • **Salesforce Help** – Organization-Wide Sharing Defaults • **Trailhead** – Module: Data Security **Experience Cloud Resources** • **Video** – Who Sees What in Communities: External Org-Wide Defaults • **Salesforce Help** – External Organization-Wide Defaults Overview • **Trailhead** – Share CRM Data with Your Partners
Account Roles and Role Hierarchies
Salesforce Org Resources • **Video** – Who Sees What: Record Access via Roles • **Salesforce Help** – User Role Hierarchy • **Trailhead** – Module: Data Security **Experience Cloud Resources** • **Video** – Who Sees What in Communities: Accounts and Role Hierarchies • **Salesforce Help**

Resources for Sharing and Security

- Create Community Users
- Set the Default Number of Community Roles
- Sharing Data with Partner Users

- **Trailhead**
  - Share CRM Data with Your Partners

Sharing Rules

Salesforce Org Resources

- **Video**
  - Who Sees What: Record Access via Sharing Rules
- **Salesforce Help**
  - Sharing Rules
- **Trailhead**
  - Module: Data Security

Experience Cloud Resources

- **Video**
  - Who Sees What in Communities: Sharing Rules
- **Trailhead**
  - Share CRM Data with Your Partners

Sharing for Experience Cloud Sites

Resources

- **Video**
  - Who Sees What in Communities: Community-Specific Sharing
- **Salesforce Help**
  - Sharing Set Overview
  - Use Sharing Sets in Communities
  - Share Groups
  - Super User Access
- **Trailhead**
  - Share CRM Data with Your Partners

Enable Clickjack Protection in Experience Cloud Sites

Clickjacking is a type of attack that tricks users into clicking something, such as a button or link, because they perceive it to be safe. By creating hidden iframes pointing to your Experience Cloud site pages, hackers can entice users to click an element that appears to be on a different web page. But instead of the visible element handling the click, the click is hijacked and some element of the invisible site iframe on top receives it. Clickjacking can potentially lead to data intrusion, unauthorized emails, changed credentials, or other malicious site-specific results. With clickjack protection, however, you can secure your site by controlling whether browsers allow frames pointing to your pages.

Note: To configure clickjack protection for Site.com sites, see Enable Clickjack Protection in Site.com.

You can set clickjack protection for your Experience Cloud site pages to one of these levels.

- **Allow framing by any page (no protection)**: The least secure level. All external domains can frame your site pages.
- **Allow framing of site or community pages on external domains (good protection)**: Only trusted external domains can frame your site pages. You specify the domains that you trust in the Trusted Domains for Inline Frames list. The trusted domains list isn't available for enhanced LWR sites.
- **Allow framing by the same origin only (recommended)**: The default level for Experience Cloud sites. Allows framing of site pages by pages with the same domain name and protocol security.
- **Don't allow framing by any page (most protection)**: The most secure level. However, for Salesforce Tabs + Visualforce sites and for Experience Builder sites, this option prevents pages in the Administration section of Experience Workspaces from opening. To avoid this issue, use the default setting instead.

Tip: The location for enabling clickjack protection differs depending on whether your site is an Experience Builder site or a Salesforce Tabs + Visualforce site. If your site has a mixture of both Experience Builder and Visualforce pages, enable clickjack protection in both locations.

Enable Clickjack Protection for Experience Builder Sites

1. In Experience Builder, select **Settings** > **Security & Privacy**.
2. Under Clickjack Protection Level, select a clickjack protection level.
3. If you chose to allow framing of your site pages on your external domains, specify the domains that you trust to frame your page. For each domain, click **Add Trusted Domain** in the Trusted Domains for Inline Framing section. Then enter the domain that can frame your site pages. You can add up to 100 external domains.

   Note: Added domains take effect only when **Allow framing of site or community pages on external domains (good protection)** is selected. The trusted domains list isn't available for enhanced LWR sites.

Enable Clickjack Protection for Salesforce Tabs + Visualforce Sites

1. To access the Site Details page, use one of these methods.
   a. In Experience Workspaces, select **Administration** > **Pages** > **Go to Force.com**.
   b. From Salesforce Setup, enter `Sites and Domains` in the Quick Find box, select **Sites**, and select the site from the Sites list.
2. Click **Edit** on the Site Details page.
3. Select your preferred level of clickjack protection and save your changes.
4. If you chose to allow framing of your site pages on your external domains, specify the domains that you trust to frame your page. For each domain, click **Add Trusted Domain** in the Trusted Domains for Inline Frames section. Then enter the domain that you want to allow iframes on. You can add up to 512 external domains.

Tip: Added domains take effect only when **Allow framing of site pages on external domains (good protection)** is selected.

Note: Internet Explorer supports clickjack protection through the legacy X-Frame-Options HTTP Header only. This header supports `sameorigin`, `deny` (none), `allowall`, and `allow-from` *`uri`*. In particular, `allow-from` *`uri`* supports only one URI.

To support a list for IE users, the framing site must identify itself to the community domain by passing in a query parameter in the `iframe` tag. For example, if you add `https://example.com` as a trusted external domain, then the page on `https://example.com` must make its iframe as follows:

```
<iframe
src="https://MyDomainName.my.site.com?_iframeDomain=https://example.com"></iframe>
```

You can also set the trusted external domain in the `iframeDomain` cookie. This method allows iframes if the `_iframeDomain` URL variable isn't saved when navigating between pages in IE.

```
Cookie iframeDomainCookie = ApexPages.currentPage().getCookies().get('iframeDomain');

if (iframeDomainCookie == null) {
    iframeDomainCookie = new Cookie('iframeDomain','www.example.com');

    // Set the new cookie for the page
    ApexPages.currentPage().setCookies(new Cookie[]{iframeDomainCookie});
}
```

Authenticate Experience Cloud Site Users

You have several options for authenticating customers and employees in your Experience Cloud site. Customers are users with Community, Customer Portal, External Identity, or partner portal licenses. By default, they can log in with the username and password that Salesforce assigns them for the Experience Cloud site. Your Salesforce org's employees are users with full Salesforce licensing capabilities. These users follow the employee login flow using their Salesforce username and password. Beyond these default settings, you can configure SAML, third-party authentication providers, or OAuth to authenticate and authorize all users accessing your site. You can also configure self-registration to use Login Discovery, which makes it easier for users to authenticate.

Note:

- Session cookies are set at the domain level. When you log in as a different user during the same browser session, the new session cookies replace existing session cookies for that domain. As a result, the original user is logged out of the session.
- The following authentication options also work with custom HTTPS web addresses.

SAML for Experience Cloud Sites

If your Salesforce org already uses SAML single sign-on (SSO) to simplify and standardize your user authentication, you can extend this capability to your Experience Cloud sites.

Authentication Provider SSO with Salesforce as the Relying Party

With authentication providers, your users can log in to your Salesforce org or Experience Cloud site with single sign-on (SSO) using credentials from a third party. Authentication providers also give your users access to protected third-party data. Salesforce offers several ways to configure authentication providers, such as with OpenID Connect or with a custom OAuth 2.0 configuration. Which protocol you can use depends on the third party.

Authorize Apps with OAuth

OAuth is an open protocol that authorizes a client application to access data from a protected resource through the exchange of tokens. OAuth tokens are essentially permissions given to a client application.

SEE ALSO:

Customize Login, Self-Registration, and Password Management for Your Experience Cloud Site

SAML for Experience Cloud Sites

If your Salesforce org already uses SAML single sign-on (SSO) to simplify and standardize your user authentication, you can extend this capability to your Experience Cloud sites.

When implementing SAML SSO for Experience Cloud sites, the key is to use the site URL associated with login for the SSO flow. Also, make sure that the site URL in the SAML assertion POST includes `/login`. For more information, see SAML Single Sign-On with Salesforce as the Service Provider.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Configure SAML SSO Between Salesforce Orgs or Experience Cloud Sites

If your company deploys more than one Salesforce org or Experience Cloud site, set up SAML single sign-on (SSO) so users can easily move between them. In this SSO configuration, a single org or site acting as the identity provider authenticates users for one or more orgs or sites in the service provider role. Users can log in to all orgs or sites with a single set of credentials.

Customize SAML Start, Login, Logout, and Error Pages

When you configure SAML single sign-on (SSO) into Salesforce, you define URLs for the pages users see throughout the SSO flow. Your identity provider can provide the URLs for the start, login, and logout pages. Or you can provide your own URLs for these pages. You can also specify a custom error page.

Integrate Service Providers as Connected Apps with SAML 2.0

To integrate a service provider with your Salesforce org, you can use a connected app that implements SAML 2.0 for user authentication. Salesforce supports SAML single sign-on (SSO) when the service provider or the identity provider initiates the flow. To use this option, configure a connected app with SAML 2.0 enabled for your service provider. Define your Salesforce org as the SAML identity provider.

SEE ALSO:

Example SAML Assertions

FAQs for Single Sign-On

Configure SAML SSO Between Salesforce Orgs or Experience Cloud Sites

If your company deploys more than one Salesforce org or Experience Cloud site, set up SAML single sign-on (SSO) so users can easily move between them. In this SSO configuration, a single org or site acting as the identity provider authenticates users for one or more orgs or sites in the service provider role. Users can log in to all orgs or sites with a single set of credentials.

Configuring SSO between an org and a site is largely the same as configuring SSO across orgs, with a few small differences in endpoint URLs that point to sites.

SSO across multiple service providers uses hub-and-spoke architecture. The identity provider is the authentication hub at the center. The identity provider validates credentials and asserts the user's identity to the spokes—the orgs or sites that are the service providers.

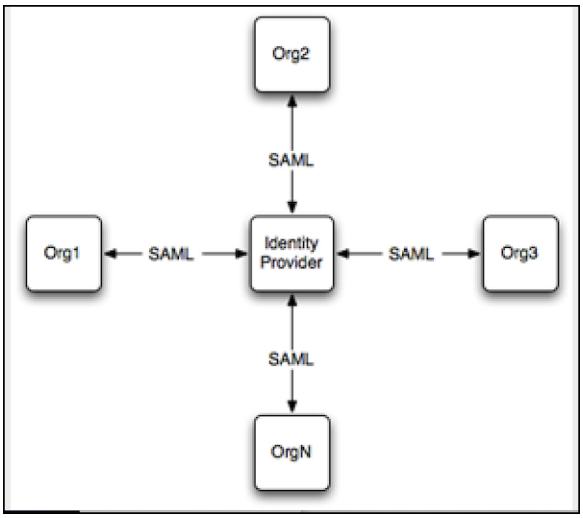
EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Federated Authentication is available in: **All** Editions

Delegated Authentication is available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Authentication Providers are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Salesforce supports identity provider-initiated and service provider-initiated logins. For more information, see SAML Login Flows.

To configure SSO between multiple Salesforce service providers, follow these high-level steps.

1. .Set up a Salesforce identity provider.
2. .Set up one or more Salesforce service providers.
3. .In the identity provider, integrate your service providers as connected apps.
4. .Test the SSO connection.

Set Up Your Salesforce Identity Provider

Configure an org or site as an identity provider to act as your authentication hub. To enable a site as an identity provider, complete these steps in the org where the site is set up.

1. From Setup, in the Quick Find box, enter `Identity Provider`, and select **Identity Provider**. Click **Enable Identity Provider**.
2. Select a certificate that the identity provider and service provider can use to trust each other. Salesforce automatically creates a self-signed certificate when you enable your org as an identity provider. To create your own certificate, select **Create a new certificate**.
3. Save your certificate. If you changed your certificate, click **OK** to accept the warning message.
4. On the Identity Provider page, click **Download Certificate**. Use it when you set up your service provider.
5. Get SAML metadata to share with the service provider. Use this metadata when you configure SAML settings in the service provider. This step is different for orgs and sites.

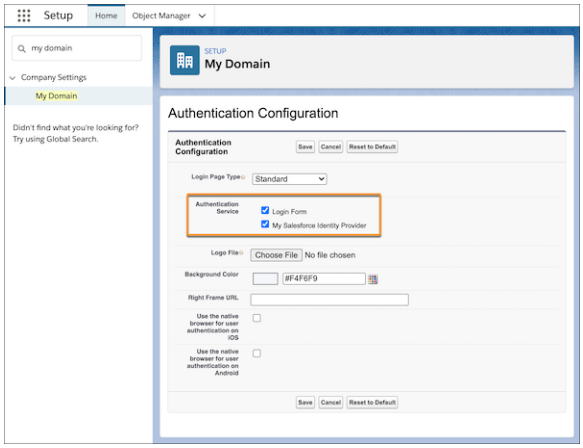
- If your identity provider is an org, click **Download Metadata** to get the metadata in an XML file. To get a URL that references an XML metadata file, copy the Salesforce Identity URL listed under SAML Metadata Discovery Endpoints.
- If your identity provider is a site, copy the Experience Cloud Site Identity URL under SAML Metadata Discovery Endpoints.

Set Up Your Salesforce Service Providers

Configure your service provider orgs or sites—the spokes that rely on your authentication hub. Complete these steps in the service provider org or the org where your service provider site is enabled.

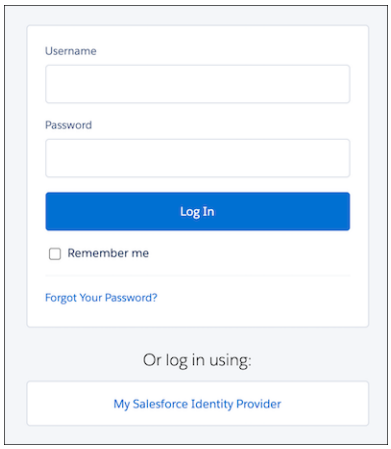
1. From Setup, in the Quick Find box, enter `Single Sign-On Settings`, then select **Single Sign-On Settings**.
2. Click **Edit**. To see SAML SSO settings, select **SAML Enabled**. Save the change.
3. Under SAML Single Sign-On Settings, click the appropriate button to create a configuration.
   a. If you downloaded an XML metadata file from the identity provider, click **New from Metadata File**. Upload the metadata file that you saved and click **Create**. This option uses the metadata from the XML file to complete SSO settings.
   b. If you copied the Salesforce Identity URL or the Experience Cloud Site Identity URL from the identity provider, click **New from Metadata URL**. Paste the URL and click **Create**. This option reads the XML file at the Salesforce Identity URL and uses it to complete SSO settings.

   The metadata options fill in the required SAML settings, including the Issuer, Entity ID, and Identity Provider Login URL fields.
4. For Identity Provider Certificate, upload the certificate you downloaded earlier from the identity provider.
5. For SAML Identity Type, select **Assertion contains the Federation ID from the User object**.
6. Save your settings. Then, from the Single Sign-On Settings pages, copy and save the Entity ID. You share this value with the identity provider when you create a connected app.
7. From the same page, get the SAML login endpoint to share with the identity provider. This step is different for orgs and sites.
   a. To configure your org as a service provider, copy the Login URL under Your Organization.
   b. To configure your site as a service provider, click the dropdown arrow next to For Communities. Your site's SAML endpoints appear. Copy the Login URL for your site.
8. In the service provider, add the identity provider as an authentication service.
   a. From Setup, in the Quick Find box, enter `My Domain`, then select **My Domain**.
   b. Under Authentication Configuration, click **Edit**.
   c. Select the authentication service for your identity provider.



To prevent users from logging in directly to the service provider, deselect **Login Form**. When users go to the service provider Login URL, they're redirected to the identity provider to log in.

To give users the option to log in directly to the service provider, select **Login Form** and your identity provider. With both of these options selected, your identity provider appears as a login option on the service provider's login page. Users can decide whether to log in to the service provider directly or log in with SSO.



9. To define your other orgs as service providers, repeat these steps. Use the SAML metadata from your identity provider to complete SSO settings for your service providers.

Integrate Service Providers as Connected Apps

To define the service provider to the identity provider, create a connected app in the identity provider.

1. In the identity provider, from Setup, in the Quick Find box, enter `App`, then select **App Manager**. Click **New Connected App**.
2. Complete the connected app's basic information.
3. Under Web App settings, select **Enable SAML**. Remember the Entity ID and Login URL values that you saved when you configured your service provider? You need them now to complete the connected app settings.
   a. For **Entity ID**, paste the Entity ID from the service provider.
   b. For the **ACS URL**, paste the Login URL for the org or site.
   c. For **Subject Type**, select `Federation ID`.
4. Save the settings.
5. To give your users access to this service provider, click **Manage** on the connected apps page. Select **Manage Profiles** or **Manage Permission Sets** and add the profiles or permission sets you want to access the service provider. For more information on profiles and permission sets, see Manage Data Access and Manage Other Access Settings for a Connected App.
6. Each service provider needs its own connected app in the identity provider. To define your other service providers, repeat these steps.

Test the SSO Connection

Map a test user from the identity provider to the service provider and confirm that the test user can log in with SSO.

1. In the identity provider, create a test user.
   a. From Setup, in the Quick Find box, enter `Users`, then select **Users**.
   b. Click **New User**.

c. Complete the test user's basic information and assign the user a profile that can access the service provider.

d. Under Single Sign On Information, enter a unique Federation ID. The Federation ID can be any value. For more information on identifying and mapping users, see Map Salesforce Users to the SAML Service Provider.

e. Save the settings.

2. In the service provider, create the same test user. To bind the users together, use the same Federation ID that you entered for the test user in the identity provider.
3. In an incognito browser, enter the My Domain URL for the identity provider.
4. Log in to the identity provider as the test user.
5. In a new incognito browser tab, enter the My Domain URL for the service provider.

If SSO is successful, you're redirected to the identity provider. Because you're already authenticated, you're then redirected back to the service provider and logged in.

Customize SAML Start, Login, Logout, and Error Pages

When you configure SAML single sign-on (SSO) into Salesforce, you define URLs for the pages users see throughout the SSO flow. Your identity provider can provide the URLs for the start, login, and logout pages. Or you can provide your own URLs for these pages. You can also specify a custom error page.

You can customize these pages for SAML SSO using external identity providers.

- Identity Provider Login Page—In service provider-initiated SSO, the page where the user is sent for login after trying to access the service provider. The URL for this page must support service provider-initiated SSO and be able to receive SAML requests. Define the URL using the `ssoStartPage` parameter, or enter a URL in `Identity Provider Login URL`. If you specify a login page, we recommend that you also specify a logout page.

  You can use the `RelayState` parameter to control where users are directed after successful login.

- Note: If you use the `RelayState` parameter, maintain its state to send back to the service provider, as recommended in the SAML 2.0 specification. For example, if your identity provider modifies the `RelayState`, such as with URL-decoding, the identity provider must echo back the original `RelayState` to the service provider. Re-encode the relay state before returning it.

- Custom Logout Page—The page the user is redirected to when they click the Logout button or when the user's session expires. To control where the user is redirected, specify a URL for the logout page in `Custom Logout URL`.

  The default logout page is `https://MyDomainName.my.salesforce.com`.

  Or if you configure single logout, specify a logout page in `Identity Provider Single Logout URL`.

- Custom Error Page (optional)— The page the user is redirected to if a SAML login error occurs. Specify an error page in `Custom Error URL`. The error page must be publicly accessible, like a public site Visualforce page. The URL can be absolute or relative.

You can set these values when setting up SSO. Here's the order of precedence.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Federated Authentication is available in: **All** Editions

Delegated Authentication is available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, **Developer**, and **Database.com** Editions

Authentication Providers are available in: **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view the settings:
- View Setup and Configuration

To edit the settings:
- Customize Application

  AND

  Modify All Data

1. Session cookie. If you already logged in to Salesforce and a cookie still exists, SSO uses the login and logout pages specified by the session cookie.
2. Values passed in from the identity provider.
3. Values specified on the Single Sign-On Settings Setup page.

If you decide not to specify these values on the Single-Sign-On Settings Setup page, share them with your identity provider. The identity provider uses these values in either the login URL or the SAML assertion.

- `ssoStartPage`–The page that the user is redirected to when trying to log in. This value is the SAML identity provider's login page. The user is directed to this page when requesting a protected resource in Salesforce without an active session.
- `startURL`–The URL to direct the user to when SSO completes successfully. The URL can be absolute, for example, *`https://yourInstance.salesforce.com/001/o`*. Or it can be relative, for example, *`/001/o`*.

  You can also use the `RelayState` parameter to control where users are redirected after a successful login. If you use the `RelayState` parameter, make sure that you maintain its state to send back to the service provider, as recommended in the SAML 2.0 specification. For example, if your identity provider modifies the relay state, such as with URL-decoding, the identity provider must echo back the relay state to the service provider. Reencode the relay state before returning it.
- `logoutURL`–The URL where you want the user to be directed when they click the **Logout** button in Salesforce. The default is `https://salesforce.com`.

Here's an example of an `<AttributeStatement>` that contains both the `ssoStartPage` and `logoutURL`:

```
<saml:AttributeStatement>
   <saml:Attribute Name="ssoStartPage"
NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:unspecified">
      <saml:AttributeValue xmlns:xs="http://www.w3.org/2001/XMLSchema"
           xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:anyType">
              http://www.customer.org
      </saml:AttributeValue>
   </saml:Attribute>

   <saml:Attribute Name="logoutURL"
NameFormat="urn:oasis:names:tc:SAML:2.0:attrname-format:uri">
      <saml:AttributeValue xmlns:xs="http://www.w3.org/2001/XMLSchema"
           xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:type="xs:string">
              https://www.salesforce.com
      </saml:AttributeValue>
   </saml:Attribute>
</saml:AttributeStatement>
```

Integrate Service Providers as Connected Apps with SAML 2.0

USER PERMISSIONS	
To read, create, update, or delete connected apps:	Customize Application AND either Modify All Data OR Manage Connected Apps
To update all fields except Profiles, Permission Sets, and Service Provider SAML Attributes:	Customize Application AND either Modify All Data OR Manage Connected Apps
To update Profiles, Permission Sets, and Service Provider SAML Attributes:	Customize Application AND Modify All Data AND Manage Profiles and Permission Sets
To rotate the consumer key and consumer secret:	Allow consumer key and secret rotation
To install and uninstall connected apps:	Customize Application AND either Modify All Data OR Manage Connected Apps
To install and uninstall packaged connected apps:	Download AppExchange Packages AND Customize Application AND either Modify All Data OR Manage Connected Apps

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Connected Apps can be created in: **Group**, **Essentials**, **Professional**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Connected Apps can be installed in: All editions

To integrate a service provider with your Salesforce org, you can use a connected app that implements SAML 2.0 for user authentication. Salesforce supports SAML single sign-on (SSO) when the service provider or the identity provider initiates the flow. To use this option, configure a connected app with SAML 2.0 enabled for your service provider. Define your Salesforce org as the SAML identity provider.

For example, you build a custom Your Benefits web app that implements SAML 2.0 for user authentication. You want your users to be able to log in to this app with their Salesforce credentials. To set up this SSO flow, configure the Your Benefits web app as a connected app. Define your Salesforce org as the SAML identity provider for the connected app. Your users can now log in to the Your Benefits web app with their Salesforce credentials.

1. Complete the prerequisites listed in Prerequisites for Defining Service Providers.
2. To direct users to a specific location after they authenticated, enter your app's start URL.

   The Start URL can be an absolute URL, such as `https://MyDomainName.my.salesforce.com/001/o`, or it can be the link for the application name, such as `https://customer.goodApp.com` for GoodApp. Specifying a Start URL makes the application available in the app menu and in App Launcher.

   If the connected app that you're creating is a canvas app, skip this field. The Canvas App URL field contains the URL that gets called for the connected app.
3. Create your connected app, and complete its basic information.
4. In the Web App Settings section, select **Enable SAML**, and enter this information, which is available from your service provider.
   a. **Entity Id**—The globally unique ID of the service provider. If you're accessing multiple apps from your service provider, define the service provider. Then use the `RelayState` parameter to append the URL values to direct the user to the correct app after signing in.
   b. **ACS URL**—(Assertion Consumer Service) The service provider's endpoint that receives SAML assertions.
   c. **Subject Type**—Specifies which field defines the user's identity for the app. Options include the user's username, federation ID, 15-character user ID, a custom attribute, or an algorithmically calculated persistent ID. A custom attribute can be any custom

field added to the User object in the org, as long as it's one of these data types: Email, Text, URL, or Formula (with Text Return Type). After you select **Custom Attribute** for the subject type, Salesforce displays a Custom Attribute field with a list of the available User object custom fields in the org.

d. **Name ID Format**—Specifies the format attribute sent in SAML messages. The default selection is **Unspecified**. Depending on your SAML service provider, you can set this format to email address, persistent, or transient. If you set this format to email address, your identity provider describes org users and Experience cloud users differently in SAML messages. For org users, SAML messages include only the user's email address. This sample shows the SAML message sent when an org user logs in, with the `Name ID Format` set to email address.

```
<saml:Subject>
      <saml:NameID
Format="urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress">sandy@salesforce.com</saml:NameID>

      <saml:SubjectConfirmation Method="urn:oasis:names:tc:SAML:2.0:cm:bearer">
        <saml:SubjectConfirmationData NotOnOrAfter="2021-02-04T20:24:41.098Z"
Recipient="https://playground-test.salesforce.com?so=00DR00000000R6N"/>
      </saml:SubjectConfirmation>
</saml:Subject>
```

For Experience Cloud users, SAML messages append the org ID to the user's email address. This sample shows the SAML message sent when an Experience Cloud user logs in, with the `Name ID Format` set to email address.

```
<saml:Subject>
      <saml:NameID
Format="urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress">00DR00000008fLq@sandy@play-test.com</saml:NameID>

      <saml:SubjectConfirmation Method="urn:oasis:names:tc:SAML:2.0:cm:bearer">
        <saml:SubjectConfirmationData NotOnOrAfter="2021-02-04T20:17:12.647Z"
Recipient="https://playground-test.salesforce.com?so=00DR00000000R6N"/>
      </saml:SubjectConfirmation>
</saml:Subject>
```

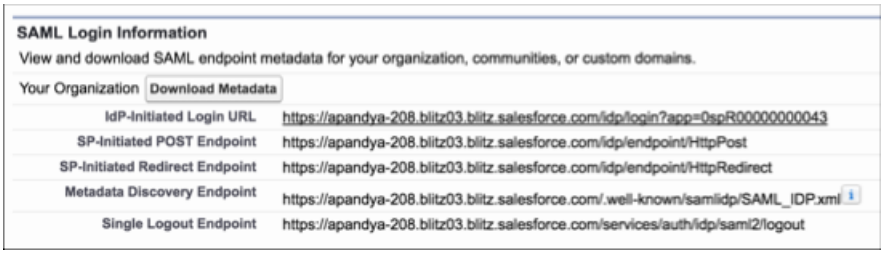
If your service provider accepts only the email address and not the org ID, create a custom attribute for email address. For more information, see Add Custom Attributes to a Connected App.

e. **Issuer**—By default, your org's My Domain is the standard issuer for your identity provider. If your SAML service provider requires a different value, specify it here.

5. To automatically log users out of the connected app service provider when they log out of Salesforce, select **Enable Single Logout**. Then take these steps.

   a. Enter the single logout endpoint of the service provider. Salesforce sends logout requests to this URL when users log out of Salesforce. The single logout URL must be an absolute URL starting with `https://`.

   b. Provide your service provider with the Salesforce IdP SLO endpoint. The endpoint is listed in your SAML Login Information as the Single Logout Endpoint. It's also listed in the SAML Metadata file as the Discovery Endpoint. The format for the endpoint is *`https://MyDomainName.my.salesforce.com/services/auth/idp/saml2/logout`*, where *`MyDomainName`* is your org's My Domain name.



c. Select the HTTP binding type for single logout provided by your service provider.

6. If your service provider requires a unique certificate to validate SAML requests from Salesforce, upload the certificate from your system. Otherwise, leave this setting as Default IdP Certificate.

   The certificate size is limited to 4 KB.

7. If the service provider gave you a security certificate, select **Verify Request Signatures**. Browse your system for the certificate and upload it. The certificate is only necessary if you plan to initiate logging in to Salesforce from the service provider and the service provider signs its SAML requests.

   Important: If you upload a certificate, all SAML requests must be signed. If no certificate is uploaded, all SAML requests are accepted.

8. Optionally, select **Encrypt SAML Response** to browse your system for the certificate and upload it. Select an encryption method for encrypting the assertion. Valid encryption algorithm values are AES–128 (128–bit key), AES–256 (256–bit key), and Triple-DES (Triple Data Encryption Algorithm).

9. For **Signing Algorithm for SAML Messages**, select SHA1 or SHA256 to secure SAML messages sent from your Salesforce org. As the identity provider, Salesforce applies the selected algorithm to its SAML requests and responses. The selected signing algorithm is applied to single sign-on and single logout messages from your org to the service provider.

10. After you configure all settings for your connected app, save your work.

Authentication Provider SSO with Salesforce as the Relying Party

With authentication providers, your users can log in to your Salesforce org or Experience Cloud site with single sign-on (SSO) using credentials from a third party. Authentication providers also give your users access to protected third-party data. Salesforce offers several ways to configure authentication providers, such as with OpenID Connect or with a custom OAuth 2.0 configuration. Which protocol you can use depends on the third party.

You have several ways to configure an authentication provider.

- Predefined authentication providers
- Salesforce-managed authentication providers
- OpenID Connect authentication providers
- Custom authentication providers

After you configure an authentication provider in Salesforce, you can add it to your Salesforce login page or your Experience Cloud login page.

EDITIONS

Available in: Lightning Experience and Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view the settings:
- View Setup and Configuration

To edit the settings:
- Customize Application

  AND

  Manage Auth. Providers

Single Sign-On Authentication and Authorization Flow

Most authentication providers serve a dual purpose. In addition to authenticating users for SSO, they provide access to user data. With access to this third-party data, you can enrich your users' Salesforce profiles with additional information after they log in with SSO.

For example, when a user logs in to Salesforce using their Facebook credentials, they can authorize access to their Facebook data. Facebook then sends Salesforce an access token, which you can use to access Facebook profile data in order to populate the user's Salesforce user profile.

Authorize Apps with OAuth

OAuth is an open protocol that authorizes a client application to access data from a protected resource through the exchange of tokens. OAuth tokens are essentially permissions given to a client application.

The resource server can validate the tokens and allow the client application access to the defined protected resources. In Salesforce, you can use OAuth authorization to approve a client application's access to your org's protected resources.

Important: You can't use OAuth independently to authenticate a user's identity. Instead, use OpenID Connect as an authentication service in addition to OAuth authorization.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **All** Editions

Encrypt Experience Cloud Site Data

You can add a measure of security to your Experience Cloud sites by encrypting files, attachments, and supported fields.

Note: Beginning with Spring '17, Shield Platform Encryption no longer masks encrypted data in the presentation layer. This change can affect some users' ability to work with encrypted data. If you have data you don't want specific users to see, revisit their field-level security settings, organization-wide sharing defaults, and object permissions.

Keep the following things in mind:

- You can encrypt data in Experience Cloud sites, but not in legacy portals.
- If you're using Classic Encryption, data in encrypted custom fields is still masked.

- Your site's specific settings for personally identifiable information (PII) apply regardless of whether data is encrypted.
- Data encryption doesn't change anything about the site user experience. However, encrypting the Account Name field affects how users' roles are displayed to admins. Normally, a site user's role name is displayed as a combination of their account name and the name of their user profile. When you encrypt the Account Name field, the account ID is displayed instead of the account name.

  For example, when the Account Name field isn't encrypted, a user belonging to the Acme account with the Customer User profile would have a role called `Acme Customer User`. When Account Name is encrypted, the role is displayed as something like `001D000000IRt53 Customer User`.

SEE ALSO:

Which Standard Fields Can I Encrypt?

Strengthen Your Data's Security with Shield Platform Encryption

CSP and Lightning Locker in Experience Builder Sites

Experience Builder sites use Content Security Policy (CSP) and Lightning Locker to secure your site from malicious attacks and custom code vulnerabilities. CSP is a W3C standard that controls the source of content that can be loaded on your site's pages and helps protect against cross-site scripting (XSS) attacks. Lightning Locker is a Salesforce architectural layer that allows third-party Lightning components and custom code to run safely on the same page in the browser. With different levels of security, you can optimize your site security choices and tolerance for risk.

Note: By default, sites created before the Spring '19 (February 2019) release use the Allow Inline Scripts and Script Access to Any Third-party Host setting. In Spring '22 (February 2022), that option is being removed for those sites. We strongly recommend updating your script security level and testing your site before that option expires.

For new sites created after the Spring '19 release, Strict CSP is the default CSP setting.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

What Is CSP?

CSP is a list of rules that define the Content-Security-Policy HTTP header that's sent to the browser when someone visits your site. Web browsers use these rules to block requests to unknown servers for different kinds of resources such as scripts, images, and other data. Strict CSP makes your site the most secure against these kinds of attacks by preventing requests to other servers, unless explicitly allowed.

CSP determines what is part of your site and what isn't. One of the most important aspects of CSP is how it defines the boundaries of your site. Anything not loaded through your site's domain name, such as a logo hosted on a separate company site, is considered a third-party host. This approach to CSP follows the same-origin policy that browsers already enforce. You can access third-party hosted materials, but you must choose a security level for your site first. Then, allow the hosts as appropriate.

What Is Lightning Locker?

Lightning Locker is a Salesforce architectural layer that enhances the security of the third-party Lightning components in your site and custom code in your `head` markup. These third-party components and custom code can contain security vulnerabilities that enable the exfiltration of data and potentially malicious actions using that data.

Lightning Locker controls whether third-party components and custom code from different namespaces can share data or interfere with each other. If third-party components or custom code deals with sensitive data, communication between these resources is a special concern. For example, without Lightning Locker, a third-party component could include JavaScript that captures secure data that a customer enters in another component, and then send that data to their own servers. Lightning Locker ensures that third-party

components and custom code that interacts with resources in other namespace can run safely even when together on the same page in the browser.

Lightning Locker:

- Uses containers to isolate all third-party components that belong to one namespace from third-party components in a different namespace.
- Enforces coding best practices by only allowing access to supported APIs and eliminating access to non-published frameworks.
- Turns on native security features in the browser.

By default, Lightning Locker is turned on for your site. Depending on your security level, you can choose to turn off Lightning Locker for all third-party components and custom code.

Security Levels

You can choose from these security levels.

Security Level	Description
Strict CSP: Block Access to Inline Scripts and All Hosts	Default setting for sites created in Spring '19 (February 2019) and later. Provides maximum security. • Blocks the execution of all inline scripts and all requests for remote JavaScript files. • Allows the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. • Lightning Locker is turned on.
Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts	Provides moderate security. • Allows inline scripts to run in your site. • Allows the loading of remote JavaScript files and the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. • Allows you to turn off Lightning Locker.
Allow Inline Scripts and Script Access to Any Third-party Host	Provides no added security, but enables your site to work as currently designed. • Blocks nothing. • Allows access to all third-party hosts without the need to explicitly allow those hosts. • Lightning Locker is turned on and can't be disabled. Note: This option is only visible for sites created before Spring '19. In Spring '22 (February 2022), this option is being removed.

CSP and Lightning Locker Design Considerations

Whether you're an administrator, content manager, or developer, be aware of the impact of the different security levels on your Experience Builder site. This impact can be far-ranging and unexpected.

Where to Allowlist Third-Party Hosts for Experience Builder Sites

Regardless of your security level, you must allowlist all non-script resources such as images, style sheets, and fonts that are hosted outside your Experience Builder site. And if you use the Relaxed CSP security level and reference external JavaScript files in your site, you must allowlist these remote hosts.

Select a Security Level in Experience Builder Sites

Choose a security level to control whether scripts can be executed from your Experience Builder site and whether third-party components and custom code can share data.

SEE ALSO:

Experience Cloud Developer Guide: Enable Third-Party Components to Run When Lightning Locker Is Off

Lightning Web Components Dev Guide: Security with Lightning Locker

Lightning Aura Components Developer Guide: Developing Secure Code

Static Resources

CSP and Lightning Locker Design Considerations

Whether you're an administrator, content manager, or developer, be aware of the impact of the different security levels on your Experience Builder site. This impact can be far-ranging and unexpected.

Tip: For extra error guidance when developing your Experience Builder site, we recommend using Google Chrome. After you set the CSP security level for your site, test it in other browsers to make sure that your customers have a good experience.

In addition to error messages and feedback, you can use the Developer Console to help identify any directive issues or CSP violations.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

What Does the Strict CSP Level Affect?

Strict CSP is the default, maximum security level for Experience Builder sites. This level of security can impact many aspects of your site, especially resources that make calls to external sources, such as:

- Rich Content Editor
- HTML Editor
- Third-party components
- Custom components
- `head` markup
- CMS Connect content

In addition, Strict CSP mitigates the risk of cross-site scripting (XSS) and other content injection attacks by disallowing inline scripts.

Note: We recommend that you update your third-party libraries to modern versions that don't depend on the `unsafe-inline` keyword.

Impact	Description	Example	Recommendation
Blocks inline scripts	All inline scripts, including inline `<script>` elements and inline event handlers, are blocked from running on your site. Common services such as Google Tag Manager can't work properly when these scripts are blocked.	You include an inline script in the `head` markup to write messages to the console log for testing purposes, for example, `<script>console.log('blocked');</script>`. Because all inline scripts are blocked, messages aren't written to the log.	Replace inline scripts in your site and instead use a static resource that's uploaded as a relative URL, or avoid inline scripts entirely.
Blocks remote JavaScript resources	All requests for remote JavaScript files are blocked from executing.	You want to use the popular D3.js library to create a scatterplot. But because all remote JavaScript files are blocked, nothing is drawn.	Upload all JavaScript libraries to your org as static resources, and then add the static resource to your component. After the library is loaded from the static resource, you can use it as normal..
Blocks non-script remote resources unless allowlisted	All requests for non-script resources to external servers are prevented, unless you explicitly allow those servers.	You decide to host your company logo on an external server and reference it in a component. However, the image isn't shown.	Host your resources through Salesforce using component functionality, such as the Rich Content Editor. Or you can host the asset as a static resource and refer to it with a relative URL.
Isolates third-party components and custom code because Lightning Locker is always on	Prevents third-party components and custom code from different namespaces from interacting and accessing each other's DOM. These resources can only access supported APIs. If you inadvertently allow a malicious domain, isolated resources are unable to send any data other than their own to that domain.	You have a third-party component that uses a login form to read a password and send it to a service for validation. Other third-party components on the same page are prevented from reading the password and potentially doing something malicious with it.	Follow best practices for using third-party components in your site and custom code in your `head` markup. If you have trouble getting third-party components or custom code to work with Lightning Locker, see Resolve Lightning Locker Conflicts in Experience Builder in the *Experience Cloud Developer Guide*.

What Does the Relaxed CSP Level Affect?

To use resources from third parties such as Google, you can choose the Relaxed CSP level. But make sure that you understand the ramifications of a less secure, relaxed CSP environment on your site.

In this state, you can optionally disable Lightning Locker when custom functionality doesn't work properly. But we strongly advise against turning off Lightning Locker. For information on Lightning Locker workarounds, see Resolve Lightning Locker Conflicts in Experience Builder in the *Experience Cloud Developer Guide*.

Impact	Description	Example
Allows inline scripts	All inline scripts are allowed to run in your site, including scripts that use `eval()`. These scripts are allowed because many common services such as Google Tag	You include in your `head` markup an inline script to log every user action on a page for marketing-related analysis. Because inline scripts are allowed, analytics are logged successfully.

Impact	Description	Example
	Manager require them to work properly. However, inline scripts are a common source of XSS attacks.	
Allows remote JavaScript and non-script resources when allowlisted	All requests to external servers for JavaScript files and non-script resources are allowed when you identify the servers. Client-side code can also make requests to your site.	You use a script that pulls in your company's blog posts. For the content to show, allow the script for the site using the Trusted Sites for Scripts area in Experience Builder, and allow the non-script content host in Trusted URLs in Setup.
Isolates third-party components and custom code when Lightning Locker is on	Third-party components and custom code from different namespaces are prevented from interacting and accessing each other's DOM. These resources can only access supported APIs. If you inadvertently allow a malicious domain, isolated resources are unable to send data to that domain.	By mistake, you use a malicious component on the same page that you're exposing internal Salesforce records through a Salesforce out-of-the-box component. Because the components are isolated, the malicious component is unable to access those records.
Allows third-party components and custom code to communicate when Lightning Locker is off	Third-party components and custom code from different namespaces can interact and access each other's DOM. These resources can also use unpublished frameworks. And resources in an open browser tab are exposed, permitting third-party components and custom code to access and edit them. Partners and developers of managed packages on AppExchange must choose whether they want their components to be available when Lightning Locker is turned off in the relaxed CSP environment.	You want to use third-party components that automatically inject additional third-party JavaScript into the page, including the site's`head` markup.

SEE ALSO:

Experience Cloud Developer Guide: Using the Developer Console

Lightning Web Components Dev Guide: Determine Whether a JavaScript Library Is Locker Compliant

Lightning Aura Components Developer Guide: eval() Function is Limited by Lightning Locker

Lightning Web Components Dev Guide: Use Third-Party JavaScript Libraries

Lightning Aura Components Developer Guide: Using External JavaScript Libraries

Experience Cloud Developer Guide: Enable Third-Party Components to Run When Lightning Locker Is Off

Where to Allowlist Third-Party Hosts for Experience Builder Sites

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Regardless of your security level, you must allowlist all non-script resources such as images, style sheets, and fonts that are hosted outside your Experience Builder site. And if you use the Relaxed CSP security level and reference external JavaScript files in your site, you must allowlist these remote hosts.

You allowlist hosts differently depending on the resource type. Non-script resources from external hosts, such as a logo or style sheet stored on a corporate site, can be shared with Lightning Experience across your org and are allowlisted in Setup. Script resources from external hosts such as JavaScript are instead specific to each site and are allowlisted in Experience Builder. Allow only external sites that you trust.

These sites are allowed automatically.

- All Salesforce-hosted data and files when referenced in your site.
- Google Analytics required sites when you add your tracking ID to the Google Analytics setting in Experience Builder. These addresses include `https://www.google-analytics.com`, `https://stats.g.doubleclick.net`, and `https://www.googletagmanager.com/gtag/js`. Some configurations of the Google Analytics integration require more domains to be allowlisted manually. See the Google Analytics directives from Google.
- Addresses that can be referenced by image tags in Chatter feed comments with video and the Rich Content Editor's video insertion functionality. These addresses include `https://img.youtube.com`, `https://i.ytimg.com`, and `https://i.vimeocdn.com`, and addresses that can be referenced by frame tags, such as `https://img.youtube.com`, `https://player.vimeo.com`, and `https://play.vidyard.com`.

Tip: Allowlist scripts or images used by external hosts that you already allowed so that those resources are displayed.

Where to Allow Hosts of Non-Script Resources

Non-script resources hosted outside your site use a `src` attribute defined by `https://any.otherdomain.com` or `wss://any.otherdomain.com`. Common non-script resources include:

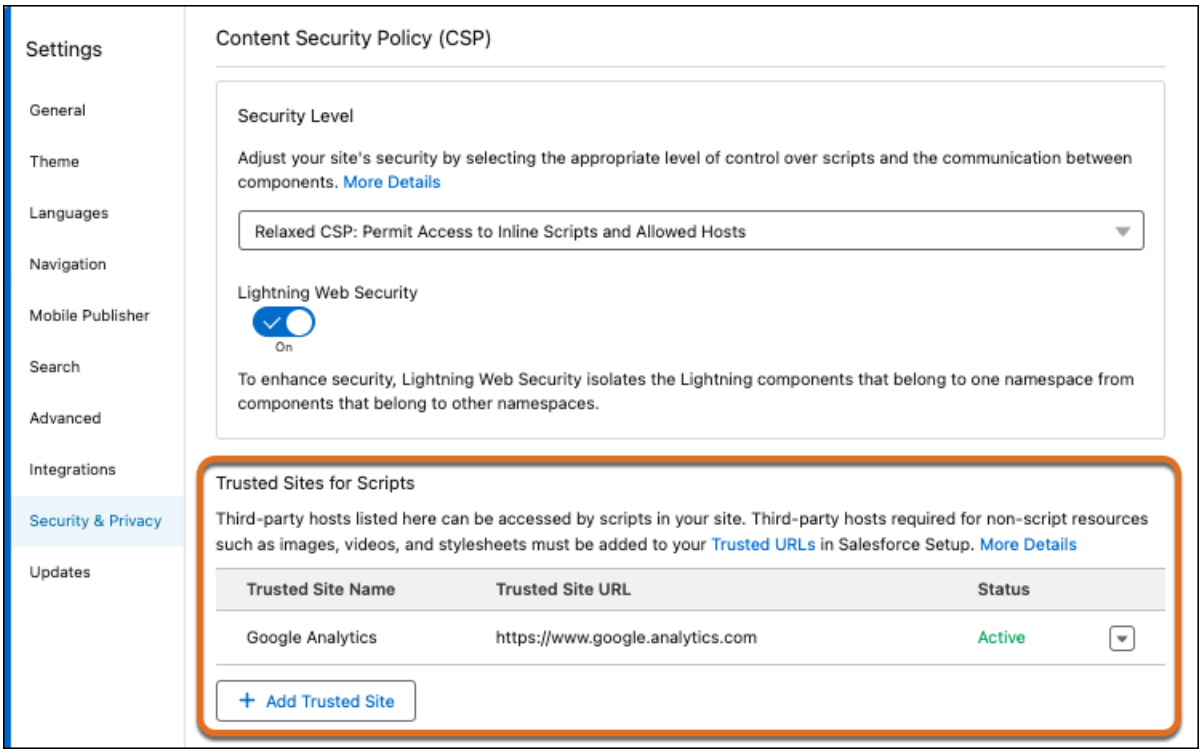
- Images
- Style sheets
- Fonts
- Media (audio and video)
- URLs using script interfaces
- Resources contained in frame elements
- Third-party APIs
- WebSocket connection

For these non-script resources, you allow hosts via Content Security Policy (CSP) directives in Trusted URLs in Setup. The resources are then available for all your Experience Builder sites. See Manage Trusted URLs.

Where to Allow Hosts of Script Resources

For remote script resources such as JavaScript, you allowlist hosts in Experience Builder from Settings and then Security & Privacy.

After you select the Relaxed CSP security level, you can add hosts in the Trusted Sites for Scripts area that appears. To use remote resources in your other Experience Builder sites, you must allowlist each resource separately per site.



From the Trusted Sites for Scripts section, you can edit or delete a site in the allowlist. You can also activate or deactivate trusted sites, which makes it easy to test or maintain your site without deleting sites from the site configuration. And if you change to Strict CSP, these allowed sites remain, which permits you to switch security levels easily.

SEE ALSO:

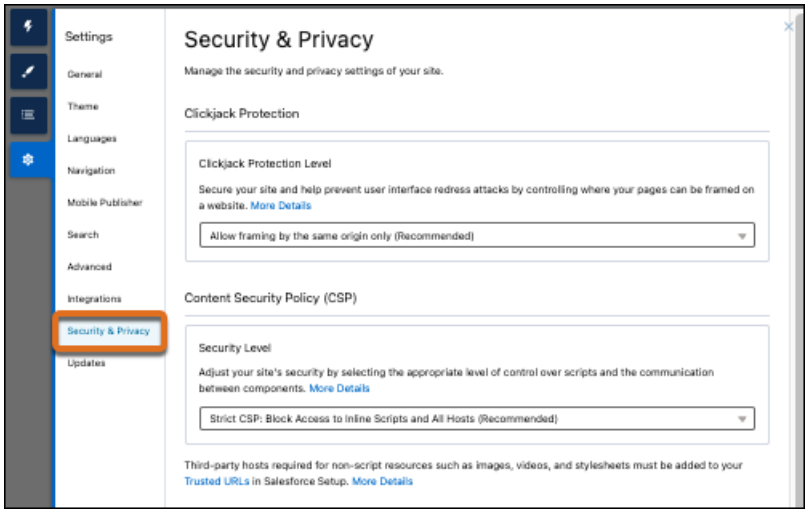
Track Site Users with Your Google Analytics Tracking ID

Select a Security Level in Experience Builder Sites

Choose a security level to control whether scripts can be executed from your Experience Builder site and whether third-party components and custom code can share data.

Selecting a security level depends on your needs and tolerance for risk. We recommend running Strict CSP for optimum security. You can easily switch between levels to test how different security levels affect your customers' experience.

1. In Experience Builder, open **Settings** > **Security & Privacy**.



2. Select a security level.

Security Level	Description
Strict CSP: Block Access to Inline Scripts and All Hosts	Default setting for sites created in Spring '19 (February 2019) and later. Provides maximum security. • Blocks the execution of all inline scripts and all requests for remote JavaScript files. • Allows the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. • Lightning Locker is turned on.
Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts	Provides moderate security. • Allows inline scripts to run in your site. • Allows the loading of remote JavaScript files and the display of non-script resources, such as images, from third-party hosts that are explicitly allowed. • Allows you to turn off Lightning Locker.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

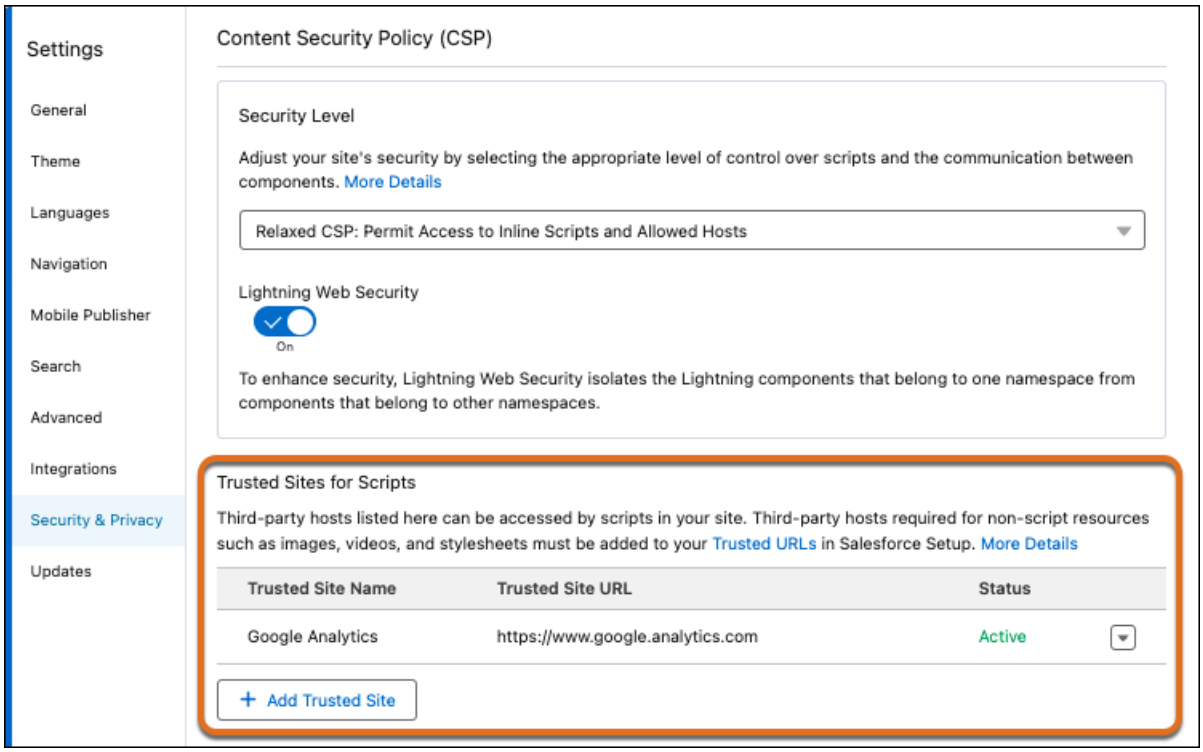
- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Security Level	Description
Allow Inline Scripts and Script Access to Any Third-party Host	Provides no added security, but enables your site to work as currently designed. • Blocks nothing. • Allows access to all third-party hosts without the need to explicitly allow those hosts. • Lightning Locker is turned on and can't be disabled. Note: This option is only visible for sites created before Spring '19. In Spring '22 (February 2022), this option is being removed.

3. If you use non-script resources hosted outside Salesforce, such as images or style sheets, add the hosts to Trusted URLs in Setup. See Manage Trusted URLs.
   Hosts allowed in Trusted URLs are available to Lightning Experience, Experience Builder sites, or both, depending on the context you apply. If available to Experience Builder sites, that host is allowed for all sites in your Salesforce org.
4. If you use script resources hosted outside Salesforce, select **Relaxed CSP: Permit Access to Inline Scripts and Allowed Hosts**, and allow the third-party hosts in the Trusted Sites for Scripts area that appears.



   a. Click **Add Trusted Site**.
   b. Enter a friendly name and the resource URL.

For added security, include the entire URL path to the resource folder—for example, `https://www.example.com/logos/`. Use the syntax `https://site_url/resource_folder/`, and ensure that the URL ends in `/`. If you add the URL for the whole domain rather than a specific resource folder, you extend trust to all resources on that domain, which can introduce a security vulnerability.

c. Click **Add Site**.

Note:

- Allowed external sites are specific to each Experience Builder site.
- You can activate or deactivate a trusted site for easy testing and maintenance, without having to remove it from your site configuration.

5. Optionally, if you selected **Relaxed CSP**, you can turn off Lightning Locker.

   For example, sometimes it's necessary to turn off Lightning Locker to use custom components that automatically inject additional third-party JavaScript into the page, including the site's `head` markup.

   Warning: Turning off Lightning Locker can potentially cause security flaws in your site and prevent third-party Aura components from being available at design time and rendering at runtime. Disable Lightning Locker only as a last resort. See Enable Third-Party Components to Run When Lightning Locker Is Off and Resolve Lightning Locker Conflicts in Experience Builder in the *Experience Cloud Developer Guide*.

6. Publish your site.

Experience Cloud Cookies

Experience Cloud uses cookies to improve functionality and accelerate processing times. By saving a user's settings, cookies can enhance the user's experience and the performance of the Experience Cloud site.

Salesforce doesn't currently provide functionality for end-user cookie consent management. The platform is compatible with many existing third-party solutions. We recommend that you work with your internal IT teams or consult your implementation partners to identify the right solution for your organization's needs.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** Editions

Cookies are divided into required, functional, and marketing. Functional cookies include preferences and statistics.

- **Required:** Strictly necessary to browse the website and to use its features.
- **Functional: Preferences:** Used by the website to remember choices made previously. Language settings are an example of a preference type cookie.
- **Functional: Statistics:** Used to collect information about how a website is used, including links clicked and which pages users visited.
- **Marketing:** Used to track online activity for a more personalized experience, including relevant advertisement.

Note:

- Experience Cloud can run without the use of functional cookies; however, site functionality can be reduced. The impact on functionality depends on the purpose of the blocked cookie.
- Experience Cloud cookies are limited to LWR and Aura sites.
- Experience Cloud doesn't use any marketing cookies.
- Any cookie with an `LSKEY-c$` prefix is the same as the original cookie, but it is set if the site has Locker Service enabled. It must be a separate cookie since Locker Service restricts how cookies are read on the client side.

This table describes the Experience Cloud cookies collected by Salesforce.

Table 4: Cookies for All Users (Authenticated and Unauthenticated)

Cookie Name	Duration	Cookie Type	Description
`__Secure-has-sid`	Session	Required	Detects a user's login state in LWR Experience on the client side. Set during login to LWR Experience. Never set this cookie to HttpOnly.
`_ga`	2 Years	Functional: Statistics	A third-party cookie that's used if the site admin chooses to track site users with a Google Analytics tracking ID.
`{UserId}_KMPage`	1 Day	Functional: Preferences	In Salesforce Classic, used to read the last user selection for 'Find in View', 'Article Language', {DataCategory}, and 'Validation Status' in Article Management.
`{UserId}_KnowledgePageDispatcher`	Session	Functional: Preferences	In Salesforce Classic, used to remember the user selection to determine whether to show 'Articles' or 'My Drafts' view in Knowledge.
`{UserId}_KnowledgePageFilter{DataCategory}`	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for the data category filter in Knowledge.
`{UserId}_KnowledgePageFilterArticleArticleType`	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for the article type filter for 'Articles' view in Knowledge.
`{UserId}_KnowledgePageFilterArticlePublishStatus`	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for the publish status filter for 'Articles' view in Knowledge.
`{UserId}_KnowledgePageFilterArticleValidationStatus`	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for the validation status filter for 'Articles' view in Knowledge.
`{UserId}_KnowledgePageFilterLanguage`	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for the language filter in Knowledge.
`{UserId}_KnowledgePageFilterMDraftArticleType`	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for the article type filter for 'My Drafts' view in Knowledge.

Cookie Name	Duration	Cookie Type	Description
{UserId}_KnowledgePageFilterMyDraftPublishStatus	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for publish status filter for 'My Drafts' view in Knowledge.
{UserId}_KnowledgePageFilterMyDraftValidationStatus	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for the validation status filter for 'My Drafts' view in Knowledge.
{UserId}_KnowledgePageSortFieldArticle	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for 'Sort by' for the 'Articles' view in Knowledge.
{UserId}_KnowledgePageSortFieldMyDraft	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for 'Sort by' for 'My Drafts' view in Knowledge.
{UserId}_springKMAnyoneDraftArticlesList	1 Day	Required	In Salesforce Classic, used to configure layout properties for the Draft Articles view in Article Management.
{UserId}_springKMArchivedArticlesList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Archived Articles' in Article Management.
{UserId}_springKMMyDraftArticlesList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Draft Articles' assigned to 'Me' in Article Management.
{UserId}_springKMMyDraftTranslationsList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Draft Translations' in Article Management.
{UserId}_springKMPublishedArticlesList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Published Articles' in Article Management.
{UserId}_springKMPublishedTranslationsList	1 Day	Required	In Salesforce Classic, used to configure layout properties for 'Published Translations' in Article Management.
`<namespace>_sid`	Session	Required	Identifies a Live Agent session. Stores a unique pseudonymous ID for a

Cookie Name	Duration	Cookie Type	Description
			specific browser session over chat service.
`<userId>expid_[site prefix]`	30 Days	Functional: Statistics	Used to render pages based on specified brand.
`52609e00b7ee307e`	Session	Required	Browser Fingerprint cookie. Used to detect session security problems.
`79eb100099b9a8bf`	Session	Required	Browser Fingerprint trigger cookie. Used to detect session security problems.
`activeView`	Session	Functional: Preferences	In Salesforce Classic, used to remember the last user selection for 'Articles' or 'Translations' tab in Article Management.
`AgentConsoleFE`	Session	Functional: Preferences	In Salesforce Classic, used to remember the page style of the Agent Console.
`AgentConsoleS`	Session	Functional: Preferences	In Salesforce Classic, used to remember the page style of the Agent Console.
`AgentConsoleY`	Session	Functional: Preferences	In Salesforce Classic, used to remember the page style of the Agent Console.
`AgentConsoleX`	Session	Functional: Preferences	In Salesforce Classic, used to remember the page style of the Agent Console.
`alohaEpt`	90 Seconds	Functional: Statistics	Used to calculate the `ExperiencePageTime` on Salesforce Classic pages.
`apex__EmailAddress`	1 Year	Required	Caches contact IDs associated with email addresses.
`auraBrokenDefGraph`	1 Week	Functional: Statistics	Used to track when a Lightning page has malformed HTML.
`autocomplete`	60 Days	Functional: Preferences	Determines if the login page remembers the user's username.
`BAYEAX_BROWSER`	Expired on Creation	Required	Identify a unique browser subscribed to CometD streaming channels.
`BrowserId`	1 Year	Required	Used for security protections.
`BrowserId_sec`	1 Year	Required	Used for security protections.

Cookie Name	Duration	Cookie Type	Description
calViewState	Session	Functional: Statistics	Sets the inline calendar date state in Salesforce Classic (current week selected).
caPanelState	Session	Functional: Preferences	Saves the open, closed, and height percent states of the calendar panel.
clientSrc	Session	Required	Used for security protections.
communityId	Session	Required	Cookie set to tie the ideas to a specific Experience Cloud site.
CookieConsent	1 Year	Required	Used to apply end-user cookie consent preferences. Stores a Boolean for whether user has consented to the cookie policy options offered by the site. Without this cookie, customers would not be able collect consent from their end users.
CookieConsentPolicy	1 Year	Required	Used to apply end-user cookie consent preferences set by our client-side utility.
cookieSettingVerified	Session	Required	Used to create a popup message telling users that cookies are required.
cordovaVersion	Session	Required	Used for internal diagnostics with mobile applications.
cqcid	1 Year	Functional: Statistics	Used to track a guest shopper's browsing activity.
csssid	Session	Required	Used to establish a request context in the correct tenant org.
csssid_Client	Session	Required	Enables user switching.
devOverrideCsrfToken	Session	Required	CSRF Token.
dialpadShown	Session	Required	Used in essential Open CTI functionality to determine the dial pad focus.
disco	Session	Required	Tracks the last user login and active session for bypassing login (For example, OAuth immediate flow).
FedAuth	Session	Required	For the SharePoint connector, used to authenticate to the top-level site in SharePoint.

Cookie Name	Duration	Cookie Type	Description
force-proxy-stream	3 Hours	Required	Ensures that client requests hit the same proxy hosts and are more likely to retrieve content from cache.
force-stream	180 Minutes	Required	Used to redirect server requests for sticky sessions.
gTalkCollapsed	1 Year	Required	Controls whether the sidebar in Salesforce Classic is open or not for a user.
guest_uuid_essential_<15-char SiteID>	1 Year	Required	Provides a unique ID for guest users in Experience Cloud sites. Expires one year after the user's last visit to the site.
hideDevelopmentTools	Session	Functional: Preferences	Used to determine whether to show the developer tools.
hideFilesWarningModal	50 Years	Functional: Preferences	Stores the user acknowledgment that a public link to a Salesforce file is on email send. The warning window isn't continually shown after the user acknowledges this action.
hideIdentityDialog	1 Year	Functional: Preferences	Hides the dialog box that informs that the current user is logged out when switching to another user.
idccsrf	Session	Required	Tracks CrossSiteRequestForgery validation for certain SSO flows.
ideaToggle	Session	Functional: Preferences	Show the 'Ideas' list view or the 'Feed' list view.
inst	Session	Required	Used to redirect requests to an instance when bookmarks and hardcoded URLs send requests to a different instance. This type of redirect can happen after an org migration, a split, or after any URL update.
iotcontextsplashdisable	10 Years	Functional: Preferences	For the IoT product, stores user preference of whether to show Context Splash popup.
language	Session	Required	Identifies the language for custom components, surveys, and flows, which support multiple languages. Without this cookie, translations for

Cookie Name	Duration	Cookie Type	Description
			custom features can appear incorrectly.
`lastActivePage`	Session	Required	Used in essential Open CTI functionality, such as determining if CTI should screen pop the current call object.
`lastCallObjectId`	Session	Required	Used in essential Open CTI functionality, such as determining if CTI should screen pop the current call object.
`lastlist`	Session	Required	Used to store the cookie name for the last list URL.
`liveagent_invite_rejected_`	Session	Functional: Statistics	Instructs Live Agent not to reissue an invitation on the same domain. Deletion of this cookie degrades customer experience as they can get repeated invitations.
`liveagent_sid`	Session	Required	Identifies a Live Agent session. Stores a unique pseudonymous ID for a specific browser session over chat service.
`lloopch_loid`	1 Year	Required	Determines whether to send the user to a specific portal login or an app login.
`login`	60 Days	Functional: Preferences	If the user's session has expired, used to fetch the username and populate it on the main login page when using the process builder app.
`logouturl`	Session	Functional: Preferences	Stores the last logged in org for redirecting requests. Used for logging whether the cookie is present in site and community guest-user requests.
`oid`	1 Year	Required	Stores the last logged in org for redirecting requests. Used for logging whether the cookie is present in site and community guest-user requests.
`oinfo`	3 Months	Functional: Statistics	Tracks the last logged in org.
`pctrk`	1 Year	Required	Used to track unique page visitors in Experiences.

Cookie Name	Duration	Cookie Type	Description
`pc-unit`	1 Year	Functional: Preferences	Sets a preference for displaying platform cache units to either MB or KB.
`PicassoLanguage`	Session	Required	Used to store a user's language selection for this Experience Builder site. The site doesn't load without this cookie if the user changes the site's language.
`PicassoViewMode`	Session	Functional: Preferences	Stores a user's view mode selection for this Experience Builder site.
`PreferredLanguage<18-char SiteID>` for example, `PreferredLanguage0DMxx0000004C93CAE`	1 Year	Functional: Preferences	Used to store the user language preference for language detection and localized user experience in LWR sites. Used to store the user language preference for language detection and localized user experience in LWR sites.
`promptTestMod`	30 Days	Required	Stores whether test mode is in effect. This cookie is read-only.
`redirectionWarning`	1 Year	Functional: Preferences	Enables the customer to store URLs that are exempt from setting a redirect warning interstitial page on an allowlist.
`renderCtx`	Session	Required	Used to store site parameters in the session for reuse across requests by a single client for functionality and performance reasons. Metadata required for fetching site pages and components based on `pageId`, `schema`, `viewType`, `brandingSet`, `formFactor`, and audience targeting.
`RRetURL`	Session	Required	Used with 'Log in As' to restore the original state.
`RRetURL2`	Session	Required	The return URL to redirect to when logging out of a session.
`RSID`	Session	Required	Session ID and login-as session ID. In this case the cookies are copied to the response and cause the target URL to rebuild appropriately in a proxy situation. The cookies aren't created, examined, or modified.

Cookie Name	Duration	Cookie Type	Description
schgtclose	0	Functional: Statistics	Deprecated feature, not used.
sfdc_lv2	1 Year	Required	Stores identity confirmation details for Experience Cloud users. If the cookie isn't set or it expires, users must repeat the identity confirmation process the next time that they log in. Identity confirmation requires a verification method such as SMS, an authenticator app, or a security key.
sfdc-stream	3 hours	Required	Used to maintain a sticky (persistent) session on the salesforce.com domain. Makes sure that subsequent streaming requests are forwarded to the same server instance where the streaming subscription request was originally handled.
showNewBuilderWarningMessage	100 years	Functional: Preferences	Used to show or hide a warning message for the new dashboard builder.
sid	Session	Required	SessionID.
sid_Client	Session	Required	Used to detect and prevent session tampering.
sidebarPinned	10 Years	Required	Controls the state of the Salesforce Classic sidebar.
sitePreview	Session	Required	Stores the authentication code for previewing the site. Preview mode doesn’t load without this cookie.
ssostartpage	1 Year	Required	Identifies the Identity Provider (IdP) location for SSO; certain service provider initiated SSO requests can fail without this cookie.
SUCSP	Session	Required	Used when the user identity that an administrator is assuming (via Log in to Experience as User) is a Customer Success Portal (CSP) user.
SUPRM	Session	Required	Used when the user identity that an administrator is assuming (via Log in to Experience as) is a Partner Relationship Management (PRM) portal user.

Cookie Name	Duration	Cookie Type	Description
`t`	Expired on Creation	Functional: Statistics	Used to avoid duplicate access checks.
`useStandbyUrl`	Not Set	Required	Controls how quickly to set the standby URL when loading the softphone.
`waveUserPrefFinderLeftNav`	100 Years	Functional: Preferences	Preference for left navigation UI in CRM Analytics.
`waveUserPrefFinderListView`	100 Years	Functional: Preferences	Preference for displaying list views in CRM Analytics.
`webact`	1 Year	Functional: Statistics	Used to collect metrics per page view for personalization.
`WelcomePanel`	1 Day	Functional: Preferences	Stores Experience Cloud preferences.

Show Nicknames Instead of Full Names in an Experience Cloud Site

Enabling nickname display in your Experience Cloud site allows more privacy and protects member identities. This protection is especially helpful in a public site where unregistered visitors can access member profiles.

All users have nicknames by default, which they can modify by going to *Your Name* > **Settings** in their user profile.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Select **Show nicknames**, then click **Save**.

Nicknames appear in place of first and last names in almost all locations in the Experience Cloud site. For example, they appear in feeds, list views, groups, search results, recommendations, private messages, and on user profiles and files. The Salesforce mobile app and any sites activated using Experience Builder templates show nicknames as well.

When your users make API calls from a site with nicknames enabled, you can hide the first and last name fields in SOAP API for Experience Cloud site users. Enable the **Hide first and last name fields in the SOAP API for site users, when making API calls from within a site with nicknames enabled** setting in **Setup** > **Digital Experiences** > **Settings**.

A few restrictions to keep in mind about nickname display:

- Records and user lookups on records show full names. Keep in mind, though, that you can control record and user visibility with sharing rules.
- Mobile notifications in the Salesforce mobile app show full names. You can turn off mobile notifications in the app to avoid this display.
- Searches by first, last, and full names aren't restricted and return matches, but the search results display only nicknames. Global search auto-complete recommendations show any first, last, and full names that the user has searched by or accessed via a record or another location. The recent items list also shows first, last, and full under the same conditions.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To enable nickname display:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Note: Contact Salesforce Support if you'd like Experience Cloud site users to see nicknames in notifications shown in a site. Some notification types don't support nicknames, and always show first and last names instead.

SEE ALSO:

Configure Settings in Your Administration Workspace

Securely Share Your Experience Cloud Sites with Guest Users

Experience Cloud sites help you connect with customers and partners. When building your site, you can use various settings and permissions to protect your data and your customers' data, and publicly share the site with guest users. Keeping your data secure is a joint effort between you and Salesforce.

Get a printable version of the security guide here.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

Guest User Security Policies and Timelines

To improve data security for orgs with guest users, Salesforce made some security improvements. Use this topic as a starting point to understand all the security improvements and updates, including timelines for enforcement and how to prepare for the changes.

Guest User Setup Checklist

Setting up guest users in your Experience Cloud site requires a number of different settings and configurations. Use this high-level checklist to help you keep track of all the tasks and considerations.

Give Secure Access to Unauthenticated Users with the Guest User Profile

Use a guest user profile to control public access to data, content, and objects in your site that don't require authentication. For example, you can create a customer support community where existing and potential customers can view public discussions, known issues, and solutions posted by other members or support without logging in.

Assign Records Created by Guest Users to a Default User in the Org

To increase the security of your Salesforce data, guest users are no longer automatically the owner of records they create. Instead, when a guest user creates a record, the record is assigned to a default active user in the org, who becomes the owner.

Secure Data Accessible by Guest Users

Protect your data by securing the data created by unauthenticated guest users prior to Salesforce's enforcement of the guest user security policies in the Winter '21 and Spring '21 releases.

SEO Best Practices and Considerations for Guest Users

To configure your site for search engine optimization (SEO), Salesforce uses the guest user profile to identify the public pages and objects available for indexing. A search engine is considered a guest, or unauthenticated, user. For Experience Builder sites, Salesforce automatically generates a sitemap with a list of the publicly accessible content. For sites built with Salesforce Tabs +Visualforce, you're responsible for creating the sitemap and indicating which pages are included.

Control Public Access to Your Experience Builder Sites

Set the public access level to your Experience Builder site, and set page-specific access to your site pages.

Object-Specific Security Best Practices for Guest Users

After you configure the guest user profile and the site guest user record, keep object-specific best practices in mind for guest user access.

Test Guest User Access in Your Experience Cloud Site

After you've implemented the recommended security settings, take your Experience Cloud site on a test drive to see what guest users see.

Control Which Users Experience Cloud Site Users Can See

With user sharing, you decide whether all users in an Experience Cloud site are visible to each other.

Guest User Security Policies and Timelines

To improve data security for orgs with guest users, Salesforce made some security improvements. Use this topic as a starting point to understand all the security improvements and updates, including timelines for enforcement and how to prepare for the changes.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

The Salesforce security policy encompasses all public sites created in a Salesforce org, including Lightning Platform, Site.com, or Experience Cloud. When this policy is fully enforced, any public-facing site must follow these rules.

- Securing access to records by guest users
  - Guest user external org-wide defaults are always set to private.
  - Guest users can't have more than read access to data.
  - Guest users can't be members of public groups or queues.
    - Guest users that were added to public groups or queues before this policy was enabled aren't removed automatically. You must remove these guest users manually.
  - Guest users can't access records via manual sharing.
  - Guest users can only get access to records through guest user sharing rules, a special type of criteria-based sharing rule.
    - The maximum access granted to guest users via sharing rules is read.
  - Guest users can't have the update or delete permissions on objects. Guest users can only update or delete records in System Mode.
  - Guest users can't have View All or Modify All access on objects.
- Assigning new records created by guest users to a default owner in your org
  - Guest users can't be the owner for newly created records.
  - Guest users can't be given ownership of existing records.
  - Ownership of records created by guest users must be transferred to a default owner, who is an active user in your org.
- Viewing other members of a publicly available site
  - Guest users can't be assigned the View All Users permission.
  - Your org can assess member visibility on a site by site basis.

Timelines for Enforcing Public Site Security Policies

Settings have been enabled every release since Summer '20. Check to see what release your org is running on Salesforce Status.

Details of the Summer '23 Updates

During the Summer '23 release, Salesforce enforces the Restrict Emails Sent from the Guest User release update. Salesforce blocks any emails sent from an unverified email address in the guest user record. Orgs with a verified organization-wide email address aren't affected by this release update, since the "sent from" email address defaults to the org's verified email address. To avoid disruptions to emails sent from the guest user record, create a verified email address for your org. The email address must have the **Allow All Profiles to Use**

this From Address option enabled. If you don't want to enable the **Allow All Profiles to Use this From Address** option, simply update the guest user record email field with your org's verified organization-wide email address.

Details of the Winter '23 Updates

During the Winter '23 release, Salesforce enforces the Remove Guest User Assignments from Permission Sets Associated with Permission Set Licenses with Restricted Object Permissions release update. Salesforce removes guest user assignments from permission sets and permission set groups associated with permission set licenses that contain the View All, Modify All, edit, and delete standard object permissions. If you're affected, Salesforce Customer Support will contact you directly about the process and timeframe for enforcing this update in your org.

Details of the Spring '22 Updates

Salesforce removed the setting **Enforce secure record access for guests accessing products**. The setting was intended for use in testing guest user sharing rules on the Product2 object during Winter '22. For guest users, org-wide defaults are set to Private for the Product2 object, and this access level can't be changed. To grant guest users access to product records, you must create guest user sharing rules.

Starting in Spring '22, Salesforce began taking steps to secure permission set license assignments for guest users. You can no longer assign guest users permission sets or permission set groups associated with permission set licenses that contain the View All, Modify All, edit, and delete standard object permissions. In Winter '23, Salesforce is removing guest user assignments from permission sets and permission set groups associated with permission set licenses that contain these restricted object permissions. The only object permissions allowed for guest users are read and create. To help you prepare, Salesforce introduced the Remove Guest User Assignments from Permission Sets Associated with Permission Set Licenses with Restricted Object Permissions release update in Spring '22.

Note: This update originally was called Remove Permission Set Licenses with View All, Modify All, Edit, and Delete Object Permissions from Guest Users. We changed the update to remove guest user assignments of permission sets and permission set groups that are associated with permission set licenses that contain the restricted permissions. This removal of permission set and permission set group assignments is instead of removing assignments of the permission set licenses themselves. Permission set license assignments aren't removed automatically from guest users, but we encourage you to remove them yourself as a security best practice.

For more information on permission sets vs permission set licenses, see Permission Set Licenses in Salesforce Help.

Details of the Winter '22 Updates

Salesforce added the setting **Enforce secure record access for guests accessing products** to use in testing guest user sharing rules for the Product2 object during Winter '22. Turn the setting on or off in **Setup** > **Product**.

The setting will be removed with the Spring '22 release. The **Secure guest user record access** setting will also be applied to products in Spring '22. For guest users, org-wide defaults are set to Private for the Product2 object, and this access level can't be changed. To grant guest users access to product records, you must create guest user sharing rules.

Details of the Winter '21 Updates

In the Winter '21 release, Salesforce enabled the following three settings. These settings can't be disabled.

- Setting name: **Secure guest user record access**
  - To access this setting, from Setup enter `Sharing Settings` in the Quick Find box.
  - Select **Sharing Settings**.
- Setting name: **Assign new records created by guest users to the default owner**

  - To access this setting, from Setup enter `Digital Experiences` in the Quick Find box.
  - Select **Digital Experiences** > **Settings**.
- Setting name: **Assign new records created by the Salesforce Sites guest users to a default owner in the org**
  - To access this setting, from Setup enter `Sites` in the Quick Find box.
  - Select **Sites and Domains** > **Sites**.

Details of the Spring ’21 Updates

The following guest user object permissions are removed with the Spring ’21 release.

- Edit
- Delete
- Modify All
- View All

The preceding permissions are turned off for custom objects and the following standard objects: Order, Survey Response, ProfileSkillUser, and ProfileSkillEndorsement.

Important: With the Spring ’21 release, Salesforce is removing the View All, Modify All, edit, and delete permissions for guest users in all orgs.

If a permission set or permission set group is assigned to the guest user and grants Modify All, View All, edit, or delete, to custom objects, or Order, Contract, Survey Response, ProfileSkillUser, and ProfileSkillEndorsement, then the guest user is removed from the permission set or permission set group. If any other permissions were granted using the same permission set or permission set group, the guest user can’t access them. If you have permission sets or permissions set groups that have Modify All, View All, edit, or delete permissions on objects, and other permissions, we recommend that you clone the permissions sets and remove Modify All, View All, edit, or delete permissions. You can then reassign the cloned permission sets and permission set groups to guest users. With the Spring '21 release, you can no longer assign Modify All, View All, edit, or delete permissions to guest users, even with a permission set or permission set group.

These obsolete permissions, with no app logic tied to them, were also removed from guest user profiles:

- Enable UI Tier Architecture
- Remove People from Direct Messages
- View Topics
- Send Non-Commercial Email
- Share internal Knowledge articles externally
- Hide the Seen By List
- Enable RecordVisibility API
- Assign Topics
- Verify Answers to Chatter Questions
- Close Conversation Threads
- Edit Topics
- Create Topics
- Delete Topics
- Merge Topics
- Allow user to access privacy data

- Modify Data Classification
- Use Any API Client
- Can Approve Feed Post and Comment

Moreover, the following changes were enforced:

- The View All Users permission was disabled for all guest users with the Summer '20 release. Use the site-specific Let guest users see other members of this site setting instead. The permission is removed from all guest users permanently with the Winter '21 release.

Potential Impact to Your Org with the Spring '21 Release

The enforcements of the public site security policies affect all customer orgs with Salesforce public sites built on Lightning Platform, Site.com, Lightning Platform, or Experience Cloud.

With the enforcement of the new security policy, your guest users' access to your public sites may change. Potential impact includes the following scenarios:

- Guest users may lose access to data.
- Guest users can no longer update or delete records.
- Guest users can no longer complete forms using Flows.
- Guest users may lose visibility to other users of the public site.
- Guest users can no longer upload files.
- The `apex:inputField` and other similar standard markup components, may no longer render for guest users on custom Visualforce pages or Lightning components.
- The `lightning:outputField` doesn't render correctly for guest users if they no longer have edit permissions.

Guest User Setup Checklist

Setting up guest users in your Experience Cloud site requires a number of different settings and configurations. Use this high-level checklist to help you keep track of all the tasks and considerations.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Complete Your Initial Setup

- [ ] Configure guest user access for your Experience Cloud sites and pages.
- [ ] Review best practices for configuring the guest user profile.
- [ ] Configure the guest user profile.
- [ ] Create guest user sharing rules to grant record access.
- [ ] Review site user visibility best practices for guest users. Then, configure guest user visibility.
- [ ] Assign records created by guest users to a default user.
- [ ] Optimize SEO for guest users.
- [ ] Set up web-to-case for guest users.
- [ ] Test guest user access to your Experience Cloud site.

Manage an Existing Setup

- [ ] Review guest user object, record, and field access for sites.

- [ ] Get a detailed report of guest user record visibility using an AppExchange package.
- [ ] Reassign records owned by guest users.
- [ ] Remove guest users from queues and public groups.
- [ ] Remove records shared with guest users through manual sharing or Apex managed sharing.

Respond to Incidents

If you think that guest users have access to records and data that they shouldn't have, deactivate the site and guest users.

- [ ] Deactivate your site.
- [ ] Deactivate guest users by deselecting **Guest users can see and interact with the site without logging in**.

Give Secure Access to Unauthenticated Users with the Guest User Profile

Use a guest user profile to control public access to data, content, and objects in your site that don't require authentication. For example, you can create a customer support community where existing and potential customers can view public discussions, known issues, and solutions posted by other members or support without logging in.

When you create an Experience Cloud site, Salesforce creates a profile, a user record, and sharing mechanisms that are available only to guest users, regardless of whether the site is configured for public access. Each public community, portal, or site uses this guest user profile and record to let unauthenticated users browse the site. All guest visitors to a public site share the same guest user record (one per site) and have the same access level.

For instance, let's say you have three communities or portals set up in your Salesforce org. Each community or portal has its own guest user profile and guest user record.

Here's how it works.

- Community—> Guest User Profile 1 —> Community Site Guest User
- Portal—> Guest User Profile 2 —> Portal Site Guest User
- Site—> Guest User Profile 3 —> Site Guest User

A guest user has access to certain pages in your community, portal, or site as long as the site is active in your org. For example, guest users can always see login and login error pages in your site.

Sharing data with guest users should be a careful and considerate process. Salesforce defaults are the most restrictive they can be for guest users, and it's up to you to decide to share data with guests or not. To secure your site for guest users, consider all the use cases and implications and implement security controls that you think are appropriate for the sensitivity of your data.

See the different Salesforce user types in action in this video.

Watch a video

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To enable public access to content on a public site:

- Create and Set Up Experiences

  AND

  Is a member of the site

Secure Guest Users' Sharing Settings and Record Access

Secure the access that unauthenticated guest users have to your org's data.

Review Guest User Object, Record, and Field Access for Sites

When you allow public access to your Experience Cloud sites, make sure that unauthenticated guest users are able to access only the data that you want them to access. Use the Guest User Sharing Rule Access Report page in Setup to quickly see what objects, records, and fields are accessible to your guest users using guest user sharing rules. Experience Cloud sites are used in many ways. While the Guest User Sharing Rule Access Report page evaluates your configuration and flags potentially misconfigured sharing rules, only you know your site's business needs. Carefully decide which records and fields are accessible to your guest users.

Configure the Guest User Profile

Before publishing your Experience Cloud site with public access enabled, configure the guest user profile so that your customers can view and interact with your site without logging in.

Configure the Site Guest User Record

Each time an Experience Cloud site is created, Salesforce creates a guest user profile and a site guest user record. The site guest user record is the only user record associated with the guest user profile.

SEE ALSO:

Configure Settings in Your Administration Workspace

Apex Developer Guide: Methods Available to Experience Cloud Guest Users

Secure Guest Users' Sharing Settings and Record Access

Secure the access that unauthenticated guest users have to your org's data.

Important: Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

Important: The Secure guest user record access setting is enabled in all Salesforce orgs with Experience Cloud sites and can't be disabled. The timelines for the rollout and enforcement of this setting are published in Guest User Security Policies and Timelines.

1. From Setup, enter `Sharing Settings` in the Quick Find box.
2. Select **Sharing Settings**.
3. Select **Secure guest user record access**.
   When this setting is enabled, guest users:
   - Have org-wide defaults set to Private for all objects, including objects not listed on the Sharing Settings page. This access level can't be changed. Child objects with a master-detail relationship that rely on a parent's sharing settings have an org-wide default of Controlled by Parent. The parent object's Private org-wide default is inherited by the child object, making it Private too.
   - Can't be added to queues or public groups.
     - Guest users that were added to queues or public groups before this setting was enabled aren't removed automatically. You must remove these guest users manually.
   - Can't be given access to records through manual sharing or Apex managed sharing.
   - Can be granted Read Only access to records only through guest user sharing rules. Guest user sharing rules are a special type of criteria-based sharing rule and count toward the limit of 50 criteria-based sharing rules per object.

     Warning: The guest user sharing rule type grants access to guest users without login credentials. By creating a guest user sharing rule, you're allowing immediate and unlimited access to all records matching the sharing rule's criteria to

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To edit guest user sharing settings:
- Manage Sharing

anyone. To secure your Salesforce data and give your guest users access to what they need, consider all the use cases and implications of creating this type of sharing rule. Implement security controls that you think are appropriate for the sensitivity of your data. Salesforce is not responsible for any exposure of your data to unauthenticated users based on this change from default settings.

SEE ALSO:

Create Guest User Sharing Rules

Review Guest User Object, Record, and Field Access for Sites

When you allow public access to your Experience Cloud sites, make sure that unauthenticated guest users are able to access only the data that you want them to access. Use the Guest User Sharing Rule Access Report page in Setup to quickly see what objects, records, and fields are accessible to your guest users using guest user sharing rules. Experience Cloud sites are used in many ways. While the Guest User Sharing Rule Access Report page evaluates your configuration and flags potentially misconfigured sharing rules, only you know your site's business needs. Carefully decide which records and fields are accessible to your guest users.

Review all rows in the report, and then validate the intent of sharing the object with the guest user. We strongly recommend that you test any access changes in a sandbox environment before implementing them in production.

Keep these considerations in mind when using the Guest User Sharing Rule Access Report.

- If an object returns more than 10,000 results, the results are an approximation and can skew lower. Converted leads may also be counted incorrectly as leads, rather than an account, an opportunity, and contacts.
- The number of fields identified as having personal information are based on individual fields, not aggregate fields. For example, a name field is counted twice, for both first and last name.
- The report is missing the following object counts: Solution, EmailMessage, Contact, CaseComment, Task, Note, Pricebook2, Partner, CollaborationGroup, AccountContactRelation. Use the Guest User Sharing rules you've created for these objects to check whether any of their records are viewable by guest users.
- The Guest User Sharing Rule Access Report is available for LWR and Aura sites.
- The Network object always shows in the report, as it houses the site.
- Please be patient. Depending on the number of objects being reviewed, the page can take a few minutes to load.

1. From Setup, in the Quick Find box, enter `Guest User Sharing Rule Access Report`, and then select **Guest User Sharing Rule Access Report**.
2. Select a site from the dropdown, and review the report to see if any of your data is at risk of being accessible through the guest user record. Repeat this step for each site in your org.
3. If you want to change object-level access, you can do so in the guest user record, profile, permission set, or permission set group. You can access the guest user profile through **Digital Experiences** > **[Your Site's Name] Builder** > **Settings** > **General** > **[Your Site's Name] Profile**.
4. If access to records is granted through guest user sharing rules, review the rules' criteria, and make any changes you need to.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR and Aura sites

USER PERMISSIONS

To access Guest User Sharing Rule Access Report:
- Manage Users

  AND

  Customize Application

To access Experience Builder:
- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To edit object and field permissions in profiles:
- Manage Profiles and Permission Sets

  AND

  Customize Application

5. After changing access levels, refresh the page and check to ensure the tool reflects the access levels you have set.
6. Test your access changes in a sandbox before changing them in production.

Configure the Guest User Profile

Before publishing your Experience Cloud site with public access enabled, configure the guest user profile so that your customers can view and interact with your site without logging in.

For Experience Builder sites, access the guest user profile from Experience Builder.

1. In Salesforce Setup, enter `digital experiences` in the Quick Find box and select **All Sites**.
2. Next to the site that you want to access, click **Builder**.
3. In Experience Builder, click and select **General**.
4. Under Guest User Profile, click the profile name.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To edit app and system permissions in profiles:

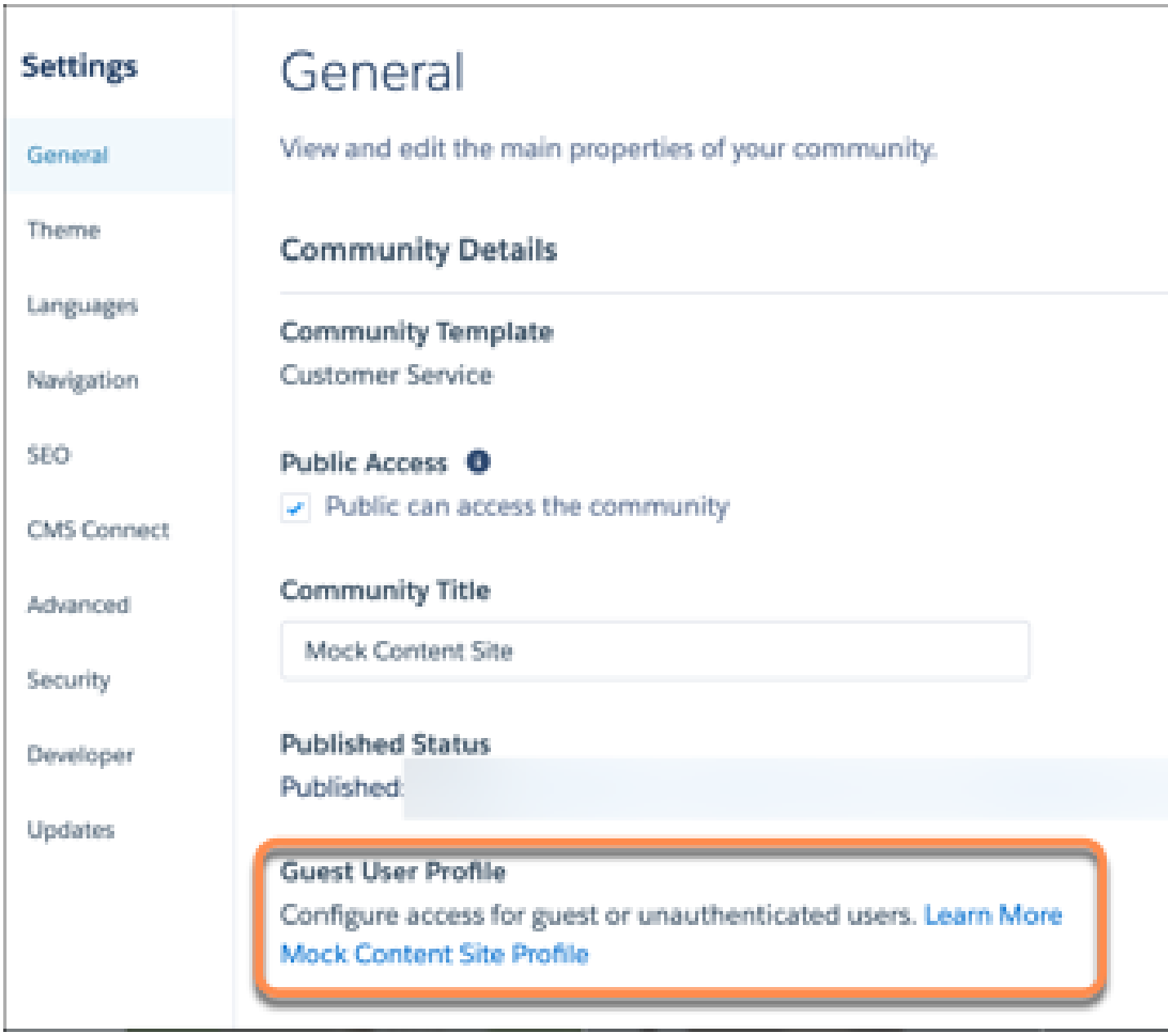
- Manage Profiles and Permission Sets

To edit object and field permissions in profiles:

- Manage Profiles and Permission Sets

  AND

  Customize Application



5. Click **Edit**.
6. Scroll to the Standard Object Permissions section, and change the object permissions to meet your business needs.
7. Create a sharing rule for each object you want to share with your users.
8. Click **Save**.

For Salesforce Tabs + Visualforce sites, access the guest user profile from Experience Workspaces.

1. In Salesforce Setup, enter `digital experiences` in the Quick Find box and select **All Sites**.
2. Next to the site that you want to access, click **Workspaces**.
3. Select **Administration** > **Pages** > **Go to Force.com**.
4. Click **Public Access Settings** and change the access levels based on your needs.

Best Practices and Considerations When Configuring the Guest User Profile
When configuring the guest user profile, keep these best practices and considerations in mind.

Best Practices and Considerations When Configuring the Guest User Profile

When configuring the guest user profile, keep these best practices and considerations in mind.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

General Best Practices and Considerations

- The guest user profile is specific to the particular Experience Cloud site. Check the guest user profile for each site to ensure data security.
- As long as the Experience Cloud site is active, guest users can access a subset of its pages, such as login and error pages.
- Use the Authenticated and Guest User Access Report and Monitoring AppExchange package to understand if records are being shared with guest users.

  Note: The Authenticated and Guest User Access Report and Monitoring is an AppExchange package isn't owned by Salesforce or supported by Salesforce Customer Support. Contact the package owner for any troubleshooting issues.

Sharing Settings

The **Secure guest user record access** setting limits the visibility and access that guest users have to your org's data.

Note: This setting is enabled by default and can't be disabled. The timelines for the rollout and enforcement of this setting are published in Guest User Security Policies and Timelines.

When this setting is enabled, guest users:

- Have org-wide defaults set to Private for all objects. This access level can't be changed.
- Can't be added to queues or public groups.
- Can't be given access to records through manual sharing or Apex managed sharing.
- Can be granted Read Only access to records only through guest user sharing rules. Guest user sharing rules are a special type of criteria-based sharing rule and count towards the limit of 50 criteria-based sharing rules per object.

  Warning: The guest user sharing rule type grants access to guest users without login credentials. By creating a guest user sharing rule, you're allowing immediate and unlimited access to all records matching the sharing rule's criteria to anyone. To secure your Salesforce data and give your guest users access to what they need, consider all the use cases and implications of creating this type of sharing rule. Implement security controls that you think are appropriate for the sensitivity of your data. Salesforce is not responsible for any exposure of your data to unauthenticated users based on this change from default settings.

Object Settings

- Review all default object permissions in the guest user profile, and then apply the most restrictive permissions for the guest user. For almost all objects, we recommend that the guest user has no access. If your business case calls for object data to be exposed to the guest user, set a maximum Read permission where possible.
- Review the permission set licenses, permission sets, and permission set groups assigned to guest users. Make sure that the permission set licenses don't entitle guest users to permissions not required for their business needs. Verify that guest users aren't granted unnecessary permissions via permission sets or permission set groups. In Winter '23, Salesforce is removing guest user assignments from permission sets and permission set groups associated with permission set licenses that contain View All, Modify All, edit, and

delete standard object permissions. The only object permissions allowed for guest users are read and create. For more information, see Guest User Security Policies and Timelines.

- Enable the **Assign new records created by guest users to the default owner** setting so that guest users are no longer automatically the owner of records they create.
- Never assign the View All or Modify All permission to guest users.
- Never assign update or delete permissions to guest users.

System Permissions

- Review all system permissions, and then deselect the permissions that aren't necessary for your use case.
- Disable the View All Users permission if you don't want guest users to see other users of the site. The View All Users permission is of by default on guest user profiles in orgs created in Winter '20 and later.

  Note: When you deselect View All Users, guest users no longer have access to user or topic feeds in a site.

- Disable the Run Flows permission if guest users aren't using flows. If guest users need flow access, disable the pause option on flows that guest users are accessing.

API Usage

The API Enabled permission in system permissions lets external applications or connectors use the API to authenticate or access Salesforce data. An example of API usage is the Salesforce mobile app.

- Check if the API Enabled permission is enabled for the guest user profile.
- Salesforce strongly recommends that you disable the API Enabled permission unless guest users explicitly need API access.
- Disable the permission in a sandbox first to see how guest user access is affected.

Visualforce Page and Apex

- Review all Visualforce and Apex pages that guest users can access. Remove pages that you don't want guest users to access.
- The following Salesforce-provided Visualforce pages are added by default to the guest user profile to provide common services, such as authentication flows or site maintenance.
  - BandwidthExceeded
  - CommunitiesLanding
  - CommunitiesLogin
  - CommunitiesSelfReg
  - CommunitiesSelfRegConfirm
  - CommunitiesTemplate
  - Exception
  - FileNotFound
  - ForgotPassword
  - ForgotPasswordConfirm
  - InMaintenance
  - SiteLogin
  - SiteRegister
  - SiteRegisterConfirm

  - UnderConstruction
- If your site doesn't offer self-registration, remove these self-registration pages from your guest profile:
  - CommunitiesSelfReg
  - CommunitiesSelfRegConfirm
  - SiteRegister
  - SiteRegisterConfirm
- Remove all other Visualforce pages unless they support specific business processes (ISV app, custom app).
- Restrict Apex classes for guest users. Allow Apex class access only for REST or SOAP API use. Apex classes that serve as Visualforce controllers don't need explicit access.
- In Apex class and subclass code, look for record updates or queries that don't check field-level security or object permissions or are in "without sharing" classes. Keep Apex and subclass code that runs without sharing or bypasses field-level security and object permissions to a minimum.
- If a guest user can execute an `@AuraEnabled` method in an Apex controller used by a Lightning component, always use the "with sharing" keyword.
- Add guest user profile access to any `@AuraEnabled` Apex class used by an Experience Cloud site.

Data Category Settings

- If Classic Knowledge is implemented in your org, check data category settings to ensure that guest users can access all the Salesforce Knowledge categories that you want them to.

Field-Level Security

- Review the field-level security of objects that guest users can access to ensure that they have access to the correct fields.
- Remove field-level access to fields that you don't want guest users to see.

Event Sync

If you use Einstein Activity Capture or Lightning Sync to sync events, follow the best practices to ensure that guest users don't have access to event data.

- Don't invite guest users to events.
- Don't use the same email address for a guest user and a non-guest user. Doing so could result in the guest user being added to events.
- Turn off the Access Activities permission on the Guest User profile unless access is necessary for your use case.
- If a guest user owns an event, delete or reassign the event.
- If a guest user is an invitee on an event, remove them from the organizer's event record. Or, if the event isn't part of a series, use the API to delete the relevant EventRelation record. If the event is part of a series, use the API to delete the guest user from the `UndecidedEventIniteeIds`, `AcceptedEventInviteeIds`, or `AcceptedEventInviteeIds` field on the Event object.
- If events sync from Salesforce to the connected account or in both directions, keep in mind that changes made to Salesforce events can trigger notifications to be sent to all attendees.

Configure the Site Guest User Record

Each time an Experience Cloud site is created, Salesforce creates a guest user profile and a site guest user record. The site guest user record is the only user record associated with the guest user profile.

1. In the guest user profile, click **Assigned Users**.
2. In the Full Name column, click the site guest user record link.
3. Make your changes, and click **Save**.

Best Practices and Considerations When Working with the Site Guest User Record

Keep these best practices and considerations in mind when configuring the site guest user record.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To access Experience Workspaces or Experience Builder:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To edit app and system permissions in profiles:

- Manage Profiles and Permission Sets

To edit object and field permissions in profiles:

- Manage Profiles and Permission Sets

  AND

  Customize Application

Best Practices and Considerations When Working with the Site Guest User Record

Keep these best practices and considerations in mind when configuring the site guest user record.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

General Best Practices and Considerations

- Enforce authentication where possible, and lock down access to the site guest user.

Email Field

- The best practice is for an organization to have a verified Organization-Wide Email Address, and use that email address in the guest user record. Salesforce blocks any email sent from an unverified email address. The email address on the guest user record might be used in features like custom flows, which can send notifications and reminders to users.

Record Ownership

- The site guest user must never own records.
- When a guest user creates a record, such as a case via web-to-case or a record created via a flow, the site guest user is the record owner. If the record owner isn't changed, anyone who has guest access to your Experience Cloud site can see the record. Enable the **Reassign new records created by guest users to the default owner** setting so that guest users are no longer automatically the owner of records they create.
- In some use cases, you might need to give Read access to guest users to newly created records (such as ideas created by guest users in a site). We recommend that you create a guest user sharing rule to grant record access.

Sharing Settings

The **Secure guest user record access** setting limits visibility and access that guest users have to your org's data.

Note: This setting is enabled by default and can't be disabled. The timelines for the rollout and enforcement of this setting are published in Guest User Security Policies and Timelines.

When this setting is enabled, guest users:

- Use private org-wide defaults for all objects. This access level can't be changed.
- Can't be added to queues or public groups.
- Can't be given access to records through manual sharing or Apex managed sharing.
- Can be granted Read Only access to records only through guest user sharing rules. Guest user sharing rules are a special type of criteria-based sharing rule and count towards the limit of 50 criteria-based sharing rules per object.

  Warning: The guest user sharing rule type grants access to guest users without login credentials. By creating a guest user sharing rule, you're allowing immediate and unlimited access to all records matching the sharing rule's criteria to anyone. To secure your Salesforce data and give your guest users access to what they need, consider all the use cases and implications of creating this type of sharing rule. Implement security controls that you think are appropriate for the sensitivity of your data. Salesforce is not responsible for any exposure of your data to unauthenticated users based on this change from default settings.

Assign Records Created by Guest Users to a Default User in the Org

To increase the security of your Salesforce data, guest users are no longer automatically the owner of records they create. Instead, when a guest user creates a record, the record is assigned to a default active user in the org, who becomes the owner.

Select a default owner in your org.

1. From Setup, enter `Digital Experiences` in the `Quick Find` box, then select **All Sites**.
2. Click **Workspaces** for the community you'd like to access.
3. Click **Administration** > **Preferences**.
4. Select a default user in the record ownership lookup.
5. Click **Save**.

Note: In orgs created in Summer '20 and beyond, guest users can't be assigned as owners of previously created records in the org. If you don't select an owner for records created by guest users, the owner of the community is automatically selected as the owner.

Best Practices and Considerations for Using the Guest Record Default Owner

Keep these best practices and considerations in mind when assigning a default owner to records created by guest users in Experience Cloud sites.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** editions

USER PERMISSIONS

To assign a default owner to records created by guest users in an Experience Cloud site:

- Create and Set Up Experiences
- AND is a member of the site

Best Practices and Considerations for Using the Guest Record Default Owner

Keep these best practices and considerations in mind when assigning a default owner to records created by guest users in Experience Cloud sites.

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

General Best Practices and Considerations

- Any active user in an org (excepting guest users) can be assigned as the default owner of records created by guest users. However, only users with at least read access to the records can actually access them. Ensure that the user chosen as the default owner has at least read access on the records created by guest users.
- While the new default guest user field is helpful in assigning a record owner to records created by guest users, using the field as the sole way to assign users is not considered a best practice. Set up assignment rules, processes, or triggers to correctly assign records to different users or queues based on object or criteria.
- Make sure that you have more than one person being assigned as the owner of records created by guest users. One person owning all records created by guests leads to performance issues, and causes errors if the user is no longer active in the org.
- When possible, create and assign queues as owners of records created by guest users.
- Setting the default owner for records created by guests is an option in Experience Cloud sites.
- Check all out-of-the-box flows that impact guest users, such as the Contact Us page and assignment rules, and ensure that they are working as expected.
- Reassign records in your org that are owned by the guest user site user. Use Data Loader to migrate existing records owned by guest users to a new designated user in the org.
- Avoid using Apex future methods to insert `ContentVersion` for guest users.

`OwnerID` vs. `CreatedByID` Fields

- Any existing conditions in rules and processes (such as assignment rules, processes, criteria-based sharing rules, flows, and list views) that are based on `OwnerId` equaling the guest user ID must be updated to `CreatedByID`. Remove any rules or processes that rely on the guest user ID as the owner.
- Review internal processes and ensure that employees and teams still have access to guest user records.

Apex Without Sharing

While using Apex without sharing is an option, use it rarely and with extreme caution.

- Any Apex code that creates and updates a record (in a single transaction) as a guest must run without sharing, also known as system mode. In such cases, when Apex code runs without sharing, the guest user should only update records they've just created, and no other record in Salesforce.

  Note: See Create Custom Component for Guest User Flows for an example of a component code for flows that uses an Apex class without sharing.

- You may have a multi-step flow for guest users that creates a record and then updates the record. To allow the guest user to run the flow, save the flow with the **System Context Without Sharing—Access All Data** option.
- Custom implementations that create a record and view or update it later must use an encrypted key to identify and access the record (usually an encrypted record ID), Apex without sharing, and extra checks in the Apex class (for the subsequent VIEW or UPDATE process) to limit record exposure. Limit the scope of key encryption, and narrow down the records that can be updated to specific use cases. Always check to make sure that the record is created by the guest user.

Behavior Change After Record Creation

- If your implementation is using the out-of-the-box behavior for record creation, guest users who create a record see a toast message and are redirected to the page they were using before record creation. If you'd like to create a different experience for guest users, use flows in System Mode to redirect guest users to a different custom screen after they create a record.
- Your custom implementation may allow a guest user to create a record, after which the guest user automatically sees the record detail page of the just-created record. However, the guest user loses access to the just-created record, since the record owner is assigned to a different user in the org. In this case, consider changing your implementation so the guest user is taken to a different part of your site after creating a record.
- Guest users may have the option of associating a newly created record to a parent record via a lookup (for example, creating a contact and associating it to an account).If guest users create a new parent record via a lookup, they see an error in the org (because upon creation, the guest user loses access to the parent record). To avoid error messages, you can:
  - Ensure that your org has a parent record shared with guest users via a sharing rule, so the newly created record can be associated with it. The parent record should not contain any sensitive data; or
  - Remove the create object permission for guest users.

Secure Data Accessible by Guest Users

Protect your data by securing the data created by unauthenticated guest users prior to Salesforce's enforcement of the guest user security policies in the Winter '21 and Spring '21 releases.

Secure records that were created by or shared with guest users before the enforcement of the guest user security policies in the Winter '21 and Spring '21 releases. This data includes records created before Winter '21 that are:

- Owned by guest users

EDITIONS

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- Shared to queues or public groups that a guest user is a member of
- Shared with a guest user manually or using Apex-managed sharing

After the enforcement of the new security policy in Winter '21, guest users could no longer own records, be added to queues or public groups, or have records shared with them using manual- or Apex-managed sharing. However, the security policy didn't work retroactively: If guest users had access to records before Winter '21, they continue to have access until you secure the records.

Discover Which Records Are Available to Guest Users

Use Authenticated and Guest User Access Report and Monitoring, available for free on AppExchange to see which objects and permissions users can access from your public sites. The report shows you the total number of records per object that users can access. The report also categorizes records owned by users, records shared with manual or Apex sharing, and queue or public group membership information.

Reassign Records Owned by Guest Users

After the enforcement of the security policies introduced in Winter '21, any record created by guest users is assigned to a default internal owner. However, guest users still own records they created before Winter '21.

Remove Guest Site Users from Queues and Public Groups

Queues and public groups created before the Winter '21 enforcement of guest user security policies can still have guest site users as members. Guest users being part of a queue or public group is a concern because any record shared with the public group is visible to the guest user, which can be anyone on the internet. Also, it's possible that other members in the group aren't aware of the guest user's access to their records.

Remove Records Shared Manually or via Apex Managed Sharing

With the Guest User Access Report, you can find records that were shared with guest users manually or via Apex sharing before the Winter '21 enforcement of the guest user security policy. You can then delete the records manually or by using DataLoader.

Discover Which Records Are Available to Guest Users

Use Authenticated and Guest User Access Report and Monitoring, available for free on AppExchange to see which objects and permissions users can access from your public sites. The report shows you the total number of records per object that users can access. The report also categorizes records owned by users, records shared with manual or Apex sharing, and queue or public group membership information.

Here's an example of a report.

Object Name	Is Custom?	Is Exposing Data?	Total Number of Records with Access To	Total Number of Records Owned	Total Number of Records due to Manual and/or Apex Sharing	Total Number of Records due to Non-Guest Sharing Rules	Total Number of Records due to Guest Sharing Rules	Profile Read Access?	Profile Create Access?	Profile Edit Access?	Profile Delete Access?	Profile View All Access?	Profile Modify All Access?
account	false	no risk	0	0	0	0	0	potential risk	no risk	no risk	no risk	no risk	no risk
contact	false	no risk	0	0	0	0	0	potential risk	no risk	no risk	no risk	no risk	no risk
custom_object_1__c	true	potential risk - Help me secure this	3	0	1	1	0	potential risk	no risk	no risk	no risk	no risk	no risk
custom_object_2__c	true	potential risk - Help me secure this	3	N/A	N/A	N/A	N/A	potential risk	no risk	no risk	no risk	no risk	no risk
custom_object_3__c	true	no risk	0	0	0	0	0	potential risk	no risk	no risk	no risk	no risk	no risk
custom_object_4__c	true	potential risk - Help me secure this	1	0	0	0	0	potential risk	no risk	no risk	no risk	potential risk	no risk
user	false	potential risk - Help me secure this	16	N/A	0	0	0	no risk	no risk	no risk	no risk	no risk	no risk

After you determine which records users can access, you have three options to secure the records:

- If record sharing is due to ownership, reassign the records owned by guest users to other users in your org.
- If record sharing is due to guest user membership in queues or public groups, remove guest users from queues and public groups.
- If record sharing is due to manual or Apex sharing, remove records shared via manual or Apex sharing.

Note: The Authenticated and Guest User Access Report and Monitoring is an AppExchange package isn't owned by Salesforce or supported by Salesforce Customer Support. Contact the package owner for any troubleshooting issues.

Reassign Records Owned by Guest Users

After the enforcement of the security policies introduced in Winter '21, any record created by guest users is assigned to a default internal owner. However, guest users still own records they created before Winter '21.

A site guest user in an org is one user record, and all guest users are assigned to that user record. Essentially, anyone on the internet is considered a guest user when it comes to accessing a Salesforce site. That means that anyone on the internet is also an owner of any records in the org that the site guest user owns.

To fix the ownership, query the records with tools like listviews or Data Loader. For each public site, filter on the record owner field (ID or name) equaling the guest site user. You can find the guest site user name by looking at the Assigned Users in each guest user profile. You can also use listviews or reports to filter object records by the owner field.

When you have the guest user's records, reassign ownership of the records to an authenticated user. You can do this manually in the UI on a record-by-record basis. But if you have a large quantity of records, use Dataloader to mass-update the records.

This SOQL query finds account records owned by the guest user. Replace *`Account`* with the object you're querying.

```
SELECT Id, OwnerId FROM Account WHERE OwnerId = '[GuestUserRecordId]'
```

Remove Guest Site Users from Queues and Public Groups

Queues and public groups created before the Winter '21 enforcement of guest user security policies can still have guest site users as members. Guest users being part of a queue or public group is a concern because any record shared with the public group is visible to the guest user, which can be anyone on the internet. Also, it's possible that other members in the group aren't aware of the guest user's access to their records.

To see which queues or public groups include guest users, use the Guest User Access Report, and then remove them.

You can remove guest users from queues and public groups in Salesforce Setup.

For public groups:

1. From Setup, in the Quick Find box, enter *`Public Groups`*, and then click **Public Groups**.
2. For each group that has guest users as a member, remove the guest user and save.

For queues:

1. From Setup, in the Quick Find box, enter *`Queues`*, and then click **Queues**.
2. For each queue that has guest users as a member, remove the guest user and save.

Remove Records Shared Manually or via Apex Managed Sharing

With the Guest User Access Report, you can find records that were shared with guest users manually or via Apex sharing before the Winter '21 enforcement of the guest user security policy. You can then delete the records manually or by using DataLoader.

Any record shared with guest users manually or via Apex sharing is potentially accessible to any user accessing the site from the internet. There is a risk of data being inadvertently shared.

This query returns any records shared with the guest user manually or via Apex sharing.

```
SELECT Id,[ParentId],RowCause,UserOrGroupId FROM [shareObject] WHERE UserOrGroupId IN
[userOrGroupIdList] AND RowCause != 'Owner' AND RowCause != 'Rule' AND RowCause !=
'GuestRule'
```

- Substitute `[parentId]` with the correct field for standard object shares. For custom objects, it's `[parentId]`.

- Substitute the `[shareObject]` with the value of the API name of the share object. For example, for the `Account` object, the share object is called `AccountShare`. For a custom object called `Custom_Object_1__c`, the share object is called `Custom_Object_1__Share`.
- Substitute the `UserOrGroupIdList` with a list of IDs for any Public Groups that the guest user is a part of, in addition to the record ID of the guest user record. Also, removing the guest user from any public groups is recommended, in which case this value can be the guest user record ID.

Delete these records manually or by using DataLoader.

SEO Best Practices and Considerations for Guest Users

To configure your site for search engine optimization (SEO), Salesforce uses the guest user profile to identify the public pages and objects available for indexing. A search engine is considered a guest, or unauthenticated, user. For Experience Builder sites, Salesforce automatically generates a sitemap with a list of the publicly accessible content. For sites built with Salesforce Tabs +Visualforce, you're responsible for creating the sitemap and indicating which pages are included.

Available in: Salesforce Classic and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Experience Builder Sites

You identify the standard and custom, but not chatter, objects available for SEO using the Experience Builder guest user profile. Objects and associated fields assigned read access are added to the sitemap.

- To control the scope of your sitemap and help keep your site secure, regularly review which objects are public and the number of records exposed for each object. From Experience Builder, go to **Settings** > **SEO** > **Object Access** list. It can take up to 24 hours for the Object Access list to be refreshed and include object pages and records newly made public.

- Even though an object and its fields are public, Salesforce security settings still determine guest user access to this data. To ensure that object data is available to search engines, review the sharing rules, field-level security (FLS), and permission sets assigned to that object.
- Make sure that all sensitive objects are private, even the objects used in private pages not included in the sitemap. All public pages and public objects are discoverable because search engines use the sitemap only as a starting point to identify which site content is available for crawling.

- If you enable guest user access for an object that has existing records, manually trigger the full sitemap generation on page 561. Otherwise, the sitemap doesn't include the object's records until the next automatic sitemap regeneration, which can be up to a week later.

Salesforce Tabs + Visualforce Sites

- In your sitemap, include only publicly accessible Visualforce pages and objects that you want discoverable by search engines.
- Use robots.txt for more control over which data is available for search engines to index when they crawl your site.
- Submit your sitemap to search engines, such as Google Search Console, only after completing the previous steps.

Note:

- The generation of your sitemap.xml file is limited to production environments. The file isn't created in a sandbox.
- All standard and object pages that require authentication as part of a publicly accessible site aren't included in the sitemap file. As a result, they aren't exposed to search engines for indexing.

SEE ALSO:

SEO for Experience Builder Sites

Make Objects Available for SEO

Configure the Guest User Profile

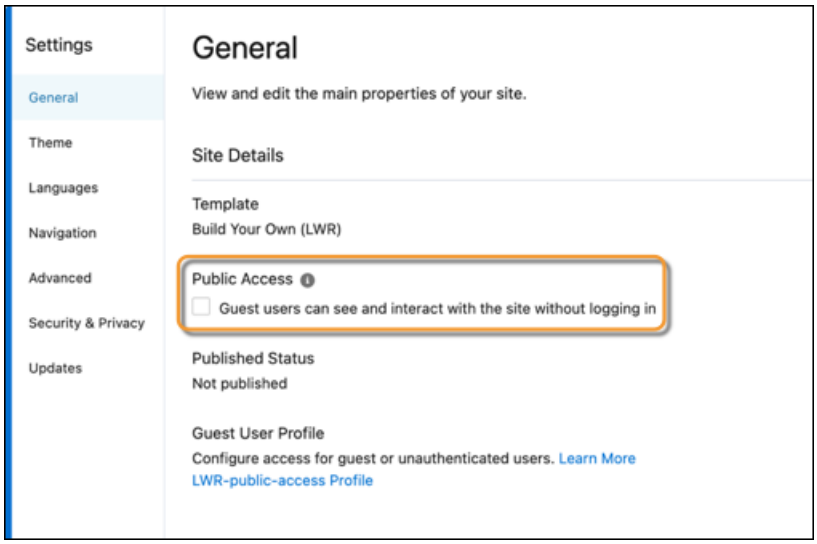
Best Practices and Tips for Using SEO in Experience Builder Sites

Control Public Access to Your Experience Builder Sites

Set the public access level to your Experience Builder site, and set page-specific access to your site pages.

If you allow public access, your Experience Cloud site pages are accessible to the public, including unlicensed users. If don't allow public access, members must log in to access the site.

1. To enable public access in an Experience Builder site, open Experience Builder.
   - From the All Sites page in Setup, click **Builder** next to the site name.
   - From a site, click **Experience Builder** in the profile menu.
2. Click **Settings**.
3. Select **Guest users can see and interact with the site without logging in**.



Note: Your site's name is visible to unauthenticated guest users even when the Public can access the site check box is deselected.

You can also set page-level access to specific Experience Builder site pages in Page Properties.

Site Default Setting
Reflects your choice for public access under General Settings.

Public
Makes the page public regardless of the site's default setting.

Requires Login
Makes the page private and requires members to log in, regardless of the site's default setting.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

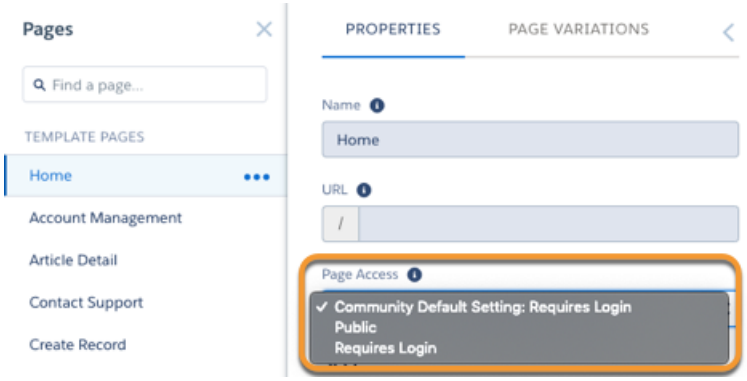
- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

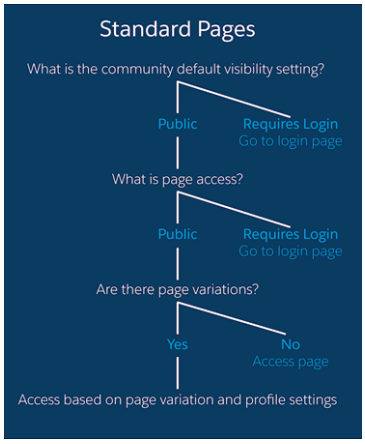
  OR

- Be a member of the site AND an experience admin or publisher in that site

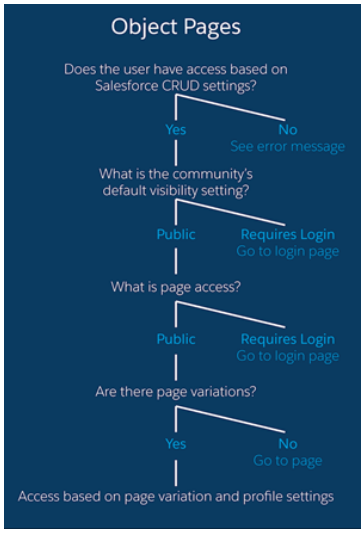


How do these settings work with audience criteria-based page visibility in Experience Builder? When a member is trying to access a page, Salesforce first checks the site's default setting. Is it public or does it require users to log in? Then Salesforce looks at the page access. When that's cleared, Salesforce checks the audience criteria-based visibility that you set in Page Variations.

How does this logic work for standard pages?



And what's the logic behind pages that show object data?



You can also set privacy settings for some components, such as the Tabs and the Navigation Menu components. To make a component on a public page visible to guest users, select **Publicly available** in the component's properties.

Important:

- Regardless of the settings, some pages are always public, and others are always private. Public pages include login-related pages (Login, Register, Forgot Password, Login Error, Check Password). The Messages page for direct messages is always private.
- If public access is enabled in Experience Builder at the page or site level, the **Let guest users view files and CMS content available to the site** preference is enabled in **Administration** > **Preferences** in Experience Workspaces. This preference lets guest users view asset files and CMS content available in the site on publicly accessible pages. Files include images associated with topics, recognition badges, site branding, and account branding. The preference remains enabled as long as the page has public access enabled.

Best Practices and Considerations for Page-Level Access in Experience Builder

Experience Builder is a powerful tool for keeping your Experience Builder site secure. Keep these best practices and considerations in mind when working with access levels.

Experience Builder Sites Search Best Practices and Considerations for Guest Users

When setting up your search pages and components for Experience Builder sites, keep these best practices and considerations in mind to keep data secure from guest users.

Set Up Web-to-Case for Guest Users in an Experience Builder Site

When you set up Web-to-Case along with a case quick action, guest users can create a case without having to log in.

Best Practices and Considerations for Page-Level Access in Experience Builder

Experience Builder is a powerful tool for keeping your Experience Builder site secure. Keep these best practices and considerations in mind when working with access levels.

- Don't create object pages for objects that aren't exposed to external users. If you have object pages that aren't being used, delete them.
- Use specific object pages when possible. These pages make public URLs more discoverable to your users.
- If you set up object pages for authenticated users, test the pages to ensure that guest users can't see them.

Experience Builder Sites Search Best Practices and Considerations for Guest Users

When setting up your search pages and components for Experience Builder sites, keep these best practices and considerations in mind to keep data secure from guest users.

Search Page

- Review page access settings for the search page to ensure that you want the search page accessed by guest users.
- To limit access to the search page, consider creating a search page variation with a guest audience.

Global Search Results Component

The Global Search Results component is the main component on the Search page in any Experience Cloud site. The component allows admins to select the objects shown in search results.

- Guest users only see results on objects they have access to.

- Actual record access for the guest user isn't limited to the objects the admin configures in the Global Search Results component. The guest user can have access to other objects based on org sharing configurations.
- Always check the org's sharing model (including org-wide defaults and sharing rules) to ensure that the guest user doesn't have access to your org's sensitive data.

Search Box Component

- As with the Global Search Results component, the admin sets up which objects to show in searches. However, record access for the guest user isn't limited to the objects the admin configures in the Global Search Box and Global Search for Peer-to-Peer Communities components. The guest user can have access to other objects based on org sharing configurations.
- Always check the org's sharing model (including org-wide defaults and sharing rules) to ensure the guest user doesn't have access to your org's sensitive data.

Search for Experience Cloud Site Users from Your Org's Global Search

With global search from your internal org, you can get uneven results when searching for a site User record. Here's why and what you can do about it. Each site has a unique network ID. When you create a site user through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID.

Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search insidesites. Since the User record is associated with a site network ID, global search doesn't return results for that record.

The workaround is to create User records in the internal org, and then associate the records to a site. You can associate an internal User record to a site by linking the internal record to a Contact record. After you forge the link, you can find the User record through global search. The User record's network ID is now associated with the internal org.

Set Up Web-to-Case for Guest Users in an Experience Builder Site

When you set up Web-to-Case along with a case quick action, guest users can create a case without having to log in.

To let guest users create cases, first create a case page layout for unauthenticated users. This allows you to capture and create basic information that would already be associated with a registered user.

Tip: Assign case field-level security and guest user actions appropriately so guest users have access to what they need but can't see your company private information. We always recommend that you authenticate users who are creating or interacting with records.

1. From Setup, enter `Web-to-Case` in the Quick Find box, then select **Web-to-Case**.
2. Select **Enable Web-to-Case**.
3. To ensure that guest users can log cases through contact support, from Setup, enter `Digital Experiences` in the Quick Find box, then select **All Sites**.
4. Select **Builder** next to the site you want to edit.
5. Drag the Create Case Form component on any page.
6. Configure the component properties.

Important: When guest users create cases using Web-to-Case, the case owner field is set as the site guest user. Set up an assignment rule, trigger, process, or flow to automatically change the record owner to a user or queue within your org. If the site guest user remains the case owner, anyone who has guest access to your site can see the record in question.

Object-Specific Security Best Practices for Guest Users

After you configure the guest user profile and the site guest user record, keep object-specific best practices in mind for guest user access.

Chatter and Discussions Best Practices and Considerations for Guest Users

Turning on Chatter for Experience Cloud sites enables discussions among your users. Keep these best practices and considerations in mind when you're setting up Chatter and discussions.

Files Best Practices and Considerations for Guest Users

To view a file on a record, Experience Cloud site users need access to the record, and record file visibility must allow site users. Use the Customer Access switch on a file's sharing detail page to allow customers to see individual files on records. Files shared with users, Chatter groups, and topics follow the same sharing model as the objects that the files are shared on. Files in Libraries can be exposed to site users, but the user must be added as a member of the library.

Chatter and Discussions Best Practices and Considerations for Guest Users

Turning on Chatter for Experience Cloud sites enables discussions among your users. Keep these best practices and considerations in mind when you're setting up Chatter and discussions.

General Best Practices

- To assign or remove Chatter-specific permissions to guest users, check System Permissions in the guest user profile.

Groups

- Give only internal and trusted members the ability to create groups. Consider a group creation workflow with an approval process.
- Keep the number of groups to a minimum, and audit your site's groups on a regular basis.
- Keep groups private whenever possible.
- Consider a process on who can manage groups.
- Make sure that the content in the group detail page meets your site's content standards.
- Review files that are publicly accessible and related to groups to make sure that they meet your site's content standards.

User-Generated Content

- Set up moderation rules for all content created by users.

Topics

- Enforce a minimum access policy for all topics.
- Never assign guest users Create Topics or Assign Topics user permissions.
- Carefully choose who can create topics in a site.
- Deselect **Suggest topics in new posts** in **Experience Workspaces** > **Administration** > **Preferences**.

Enable API Access to Chatter for Guest Users

These Lightning and Visualforce pages and components in Experience Cloud sites need access to underlying Chatter capabilities to load correctly for guest users. Enabling public access through the guest user profile and the API exposes data for guest users through Connect in Apex. Enabling public access in this way is helpful when you're building your own site pages from scratch.

- Case
- Featured Feeds
- Feed
- Group
- Group Detail
- Headline
- Record Information Tabs
- Related Articles
- Related Lists
- Reputation
- Search & Post Publisher
- Topic Detail

To enable access to Chatter functionality, access Experience Workspaces.

- Select **Administration** > **Preferences**.
- Select **Give access to public API requests on Chatter**.
- Click **Save**.

Files Best Practices and Considerations for Guest Users

To view a file on a record, Experience Cloud site users need access to the record, and record file visibility must allow site users. Use the Customer Access switch on a file's sharing detail page to allow customers to see individual files on records. Files shared with users, Chatter groups, and topics follow the same sharing model as the objects that the files are shared on. Files in Libraries can be exposed to site users, but the user must be added as a member of the library.

The logic for sharing files with Experience Cloud site users also applies to guest users. If guest users have access to an object, they can have access to files shared with that object, if the file visibility allows site users.

To give guest users access to files, use this site preference: Give access to public API requests on Chatter.

Note:

- Guest users can view Notes and Attachments but not the Files Related List. (The Note and Attachments related list displays Salesforce files.)
- Files uploaded by guest users can only be set to Viewer access.
- Guest users can't delete files, including files that they own.

- Review permissions for who can create content deliveries and public links to make sure that they align with your business needs.
- Review library membership and permissions to make sure that they meet your business needs.
- You can add both users and public groups as members of a Content Library. Public groups pose a risk of extending access beyond who you want to have access.
  - Review who are library administrators. Admins have the power to add more library members.
  - Don't add a public group to a library unless you know who is in the group and the type of members who will be added in the future.
  - Review which library permissions grant the ability to create content deliveries (the Deliver Content permission).
  - To allow guest users to view files in a library, add the guest user to a public group associated with that library.
- Add Asset Files to Asset Libraries that do not contain folders, and configure the Asset Library to be visible to guest users.

Note: Only Salesforce CRM content users can access content folders in the Asset Library.

- Make sure that unintended files aren't public.
  - Query ContentAsset to check for the field isVisibleByExternalUsers.
  - Query documents to check for the field IsPublic.
  - Query StaticResource to check whether the CacheControl field is set to Public.
- Audit file visibility on records.
- Export ContentVersion to get a list of all files in the org. Export ContentDocumentLink to see all the records that the files are shared with and what the file visibility is for the share to the record.

  Note: For each file, you see multiple shares, such as one share to the owner and multiple shares to different records. Some rows, such as a share to the owner could have the visibility set to AllUsers, but this setting doesn't grant access to site users. Only shares to records that have the visibility set to AllUsers mean that site users who have access to that record have access to its related files.
- Salesforce doesn't remove geolocation information from uploaded images.

Test Guest User Access in Your Experience Cloud Site

After you've implemented the recommended security settings, take your Experience Cloud site on a test drive to see what guest users see.

Note: Guest user access only applies to sites created with Experience Cloud. Portals created with the legacy Salesforce portals product don't have guest user access.

- Access your site using an incognito window to make sure that you're logged out.
- Browse to each public page to make sure that your guest user has the correct access level.
- Browse to object pages to see what the guest user can see.
- Do a global search in the site for specific records to see a search results page.
- Access the site from a mobile device to see the mobile guest user experience.
- Access direct links to various object detail pages as a guest user to ensure that there's no access.
- Access `[www.domain.com]/[siteprefix]/sitemap.xml` to view what is listed in your sitemap to guest users. The sitemap.xml shows what information is exposed to search engines.

Control Which Users Experience Cloud Site Users Can See

With user sharing, you decide whether all users in an Experience Cloud site are visible to each other.

When setting up sharing for external users, you have three settings to consider. These settings take effect only when the org-wide default external access for the User object is set to Private. If the org-wide external default for the User object is set to Public Read Only, all users can see one another, regardless of site-specific user visibility settings enabled.

Portal User Visibility: If enabled, portal users in the same customer or partner portal account can see each other, regardless of the organization-wide defaults. Partner users with a Partner Community license or equivalent can also see the Salesforce user who owns their partner portal account.

Site User Visibility: This setting controls whether user sharing is available for authenticated users in your org's sites. If enabled, you have the option of selecting **See other members of this site**, which turns visibility on or off, on a site-by-site basis.

Guest User Visibility: The **Let guest users see other members of this site** setting controls whether user sharing is available for unauthenticated (guest) users in your Experience Cloud sites. You grant guest user visibility on a site-by-site basis by selecting **Let guest users see other members of this site**, which turns visibility on or off.

Note: If users have been shared with other users via manual sharing or other sharing rules, they still see one another regardless of site or portal user visibility settings. Users who have been shared with other users must be members of a site to be accessible by another member.

Let's see how Portal User Visibility and Site User Visibility work together in authenticated use cases.

Note: There's no site filter for sites built with Salesforce Tabs + Visualforce. There's also no site filter in searches or API calls in sites created with any template. For example, Acme has two sites: one built on Salesforce Tabs + Visualforce and one built on Aura. Joe is a member of both sites. Mary is only a member of the Aura site, which has Site User Visibility enabled. Joe has access to Mary in the Salesforce Tabs + Visualforce site, even though Mary isn't a member of that site.

Similarly, in searches and API calls, site users have access to other site users, even if they're not members of the same site. Users can see the names of other site users. However, when they hover over their names, they can't see any details about the user if they're not members of the same site. Accessing a user's detail page is also restricted to users who are members of the same site.

	Site User Visibility	Portal User Visibility	Result
Scenario 1	Disabled	Disabled	Experience Cloud site users are visible only to themselves.
Scenario 2	Disabled	Enabled	Experience Cloud site users can see other Experience Cloud site users in the same account and the same site they're a member of.
Scenario 3 (Salesforce Tabs + Visualforce Sites)	Enabled	Disabled	Users who are members of more than one site can see all users in all sites they're members of when using Salesforce Tabs + Visualforce sites that have Site User Visibility enabled. This visibility is also true in API calls and searches on the site. Site members can't see the user details of members who aren't in the current site they're viewing, nor can they see other site members belonging to the same account.
Scenario 3 (LWR and Aura Sites)	Enabled	Disabled	Experience Cloud site users can see all other Experience Cloud site users as long as they're members of the same site, but they can't see users belonging to the same account. Users who are members of more than one site can see all users in all sites they're members of in API calls and searches on the site. Site members can't see user details of members who aren't in the current site they're viewing. They also can't see other

	Site User Visibility	Portal User Visibility	Result
			site members belonging to the same account.
Scenario 4 (Salesforce Tabs + Visualforce Sites)	Enabled	Enabled	Users who are members of more than one site can see all users in all sites they're members of when using Salesforce Tabs + Visualforce sites. This visibility is also true in API calls and searches on the site. Site users can't see the user details of members who aren't in the current site they're viewing. They can see users who are part of the same account in the site they're all members of.
Scenario 4 (LWR and Aura Sites)	Enabled	Enabled	Experience Cloud site users can see all other Experience Cloud site users as long as they're members of the same site. Users who are members of more than one site can see all users in all sites they're members of in API calls and searches on the site. They can also see users who are part of the same account in the site they're all members of.

Note: If the View All Users permission is selected on a profile, Experience Cloud site users with that profile are able to see all users in the org.

Control User Visibility in Your Experience Cloud Site

Change your org's settings to control your Experience Cloud site's user visibility for authenticated members and guest users.

Site User Visibility Best Practices for Guest Users

Site members and guest users must often see one another in a public setting. Guest user visibility is useful when you implement a public forum, like a self-service community, or build a public-facing app, like ideas. Keep these guest user visibility practices and considerations in mind when setting up your public-facing forum or site.

SEE ALSO:

Control User Visibility in Your Experience Cloud Site

Control User Visibility in Your Experience Cloud Site

Change your org's settings to control your Experience Cloud site's user visibility for authenticated members and guest users.

1. From Setup, enter `Sharing Settings` in the `Quick Find` box, then select **Sharing Settings**.
2. Click **Edit** in the Organization-Wide Defaults area.
3. Enable **Portal User Visibility** or **Site User Visibility** based on your org's needs.
4. Click **Save**.

Note: To view record names in lookup fields and system fields, such as Created By and Last Modified By, select the **Require permission to view record Names in lookup fields** checkbox. Then enable the View All Lookup Record Name permission in custom profiles or permission sets for users who must see record names in all lookup and system fields, regardless of sharing settings.

EDITIONS

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit sharing settings:
- Manage Sharing

To set up user visibility in a specific site:
- Create and Set Up Experiences

  AND

  Is a member of the site

You can manage user visibility and guest user visibility on a site-by-site basis.

1. From Setup, enter `Digital Experiences` in the `Quick Find` box, then select **Digital Experiences** > **All Sites**.
2. Click **Workspaces** for the site you'd like to access.
3. Click **Administration** > **Preferences**.
4. Select the **See other members of this site** or **Let guest users see other members of this site** checkboxes based on your site's needs.
5. Click **Save**.

Note: To see user profile photos for other users in your site, select the **See other members of this site** or **Let guest users see other members of this site** checkboxes. User profile photos display in feeds by default.

Site User Visibility Best Practices for Guest Users

Site members and guest users must often see one another in a public setting. Guest user visibility is useful when you implement a public forum, like a self-service community, or build a public-facing app, like ideas. Keep these guest user visibility practices and considerations in mind when setting up your public-facing forum or site.

- Protect the identity of your most active users by hiding the Knowledgeable Users and Reputation Leaderboard components using audience targeting in Experience Builder.
- Never use the View All Users permission to give guest users visibility to other users.
- The Site User Visibility setting in Sharing Settings is org-wide. Never use this setting to grant visibility to other users.
- The Site User Visibility setting doesn't control guest user visibility. Guest user visibility is done on a community-by-community basis.
- To give user visibility to site users, enable **See other members of this site** on a site-by-site basis.
- If your community or forum must remain private, don't use the Site User Visibility setting. This setting shows authenticated users to guest users. Instead, use sharing rules or sharing sets on the user record to open up user visibility where needed.
- Consider using nicknames to protect the identity of your site's members.
- Review the user profile page layout, and restrict exposed fields to a minimum.

Deploy an Experience Cloud Site from Sandbox to Production

We recommend creating, customizing, and testing your Experience Cloud site in a test environment, such as a sandbox, before deploying it to your production org. When testing is complete, you can use change sets or Metadata API to migrate your site from one org to another. Deciding whether to use change sets or MD API depends on several factors. Some things to consider are the complexity of the changes that you're migrating, your level of comfort with developer tools, and the application lifecycle management (ALM) model that you're using.

Tip: To learn more about the ALM models and development options available to you, check out Determine Which Application Lifecycle Management Model Is Right for You on Trailhead.

Note: Lightning Bolt Solutions aren't suitable for deploying Experience Cloud sites between your orgs. Use a Lightning Bolt Solution to share or sell a solution on AppExchange or implement a site with a turnkey solution or new look.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Change Sets

If you're more comfortable working with point-and-click tools, change sets are your deployment friend. A change set represents a set of customizations in your org (or metadata components) that you can deploy to a connected org.

You can manage your application using declarative tools. You don't have to use a command-line interface or a version control system to meet your customization needs. You use the Setup menu to create changes in a development environment. You then migrate the changes between environments as you work through the ALM steps.

Your release artifact is a set of metadata changes relative to what's in the production org. What gets released is only metadata that has been added or changed—if it doesn't change, it's not in the release.

Metadata API

If you're up to speed on Metadata API and more comfortable in the world of code, use Metadata API to deploy changes programmatically. You can retrieve, deploy, create, update, and delete customization information for your org, such as Experience Cloud sites, custom object definitions, and page layouts.

Using Metadata API is ideal when your changes are complex or when you need a more rigorous change management process and an audit process (or version control system) to manage multiple work streams.

As with the change set process, the release artifact that you create is a set of metadata changes relative to your production org.

Tip: Some Experience Cloud site settings and features aren't yet supported in Metadata API, so you have to migrate them manually between environments. Remember to track these changes so that you don't forget to migrate them.

Deploy Your Experience Cloud Site with Change Sets

Use change sets to move all or part of your Experience Cloud site between related orgs that have a deployment connection. You can use the Network component type to move any full Experience Cloud site. Or, you can use the Digital Experience component type to move partial site content for enhanced LWR sites.

Deploy Your Experience Cloud Site with the Metadata API

Use Metadata API to move your Experience Cloud site from one Salesforce org to another. Set up and test your site in your test environment, and then retrieve the site's data and deploy it to your production org.

Deploy Your Experience Cloud Site with Change Sets

Use change sets to move all or part of your Experience Cloud site between related orgs that have a deployment connection. You can use the Network component type to move any full Experience Cloud site. Or, you can use the Digital Experience component type to move partial site content for enhanced LWR sites.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Deploy A Full Experience Cloud Site with Change Sets

Use change sets to move your Experience Cloud site between related orgs that have a deployment connection, such as your sandbox and production orgs. Create, customize, and test your site in your test environment and then migrate the site to production when testing is complete.

Deploy Partial Experience Cloud Site Content with Change Sets

Use change sets to move individual Experience Cloud components and content between related orgs that have a deployment connection, such as your sandbox and production orgs. Create and test changes in your test environment, and then migrate only those changes to production when they're ready.

Considerations for Deploying Experience Cloud Sites with Change Sets

Keep the following considerations and limitations in mind when migrating your Experience Builder or Salesforce Tabs + Visualforce site with change sets.

Deploy A Full Experience Cloud Site with Change Sets

USER PERMISSIONS

To customize or publish an Experience Cloud site:	Create and Set Up Experiences
To edit deployment connections and use inbound change sets:	Deploy Change Sets AND Modify All Data Note: If a user requires access only to metadata for deployments, you can enable the Modify Metadata Through Metadata API Functions permission. This permission gives such users the access they need for deployments without providing access to org data. For details, see "Modify Metadata Through Metadata API Functions Permission" in Salesforce Help.
To use outbound change sets:	Create and Upload Change Sets, Create AppExchange Packages, AND Upload AppExchange Packages

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

Use change sets to move your Experience Cloud site between related orgs that have a deployment connection, such as your sandbox and production orgs. Create, customize, and test your site in your test environment and then migrate the site to production when testing is complete.

You can use change sets to move full Experience Builder and Salesforce Tabs + Visualforce sites using the Network component type.

1. Create and test your site in your preferred test org, such as sandbox.
2. From Setup in your test org, enter `Outbound Change Sets` in the Quick Find box, and then select **Outbound Change Sets**.
3. Create a change set, and click **Add** in the Change Set Components section.
4. Select the **Network** component type, choose your site, and then click **Add to Change Set**.
5. To add dependent items, click **View/Add Dependencies**. We recommend selecting all the dependencies listed.

   Tip:

   - For navigation menus that link to standard objects, custom list views aren't included as dependencies. Manually add the custom list view to your change list.
   - Manually add new or modified profiles or permission sets referenced in **Administration** > **Members**.
   - The list of dependencies has two Site.com items—`MySiteName` and `MySiteName1`. `MySiteName` holds the various Visualforce pages that you can set in Administration in Experience Workspaces. `MySiteName1` includes the pages from Experience Builder.

6. Click **Upload** and select your target org, such as production.

   Make sure that the target org allows inbound connections. The inbound and outbound orgs must have a deployment connection.
7. From Setup, select **Inbound Change Sets** and find the change set that you uploaded from your source org.
8. Validate and deploy the change set to make it available in the target org.

   Warning: When you deploy an inbound change set, it overwrites the site in the target org.
9. Manually reconfigure any unsupported items in the target org site.
10. Add data for your site, and test it to make sure that everything works as expected. Then publish your changes to go live.

SEE ALSO:

Considerations for Deploying Experience Cloud Sites with Change Sets

Change Sets Best Practices

Upload Outbound Change Sets

Deploy Inbound Change Sets

Deploy Partial Experience Cloud Site Content with Change Sets

USER PERMISSIONS	
To customize or publish an Experience Cloud site:	Create and Set Up Experiences
To edit deployment connections and use inbound change sets:	Deploy Change Sets AND Modify All Data If a user requires access only to metadata for deployments, you can enable the Modify Metadata Through Metadata API Functions permission. This permission gives such users the access they need for deployments without providing access to org data. For details, see "Modify Metadata Through

EDITIONS
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience
Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

	Metadata API Functions Permission" in *Salesforce Help*.
To use outbound change sets:	Create and Upload Change Sets, Create AppExchange Packages, AND Upload AppExchange Packages

Use change sets to move individual Experience Cloud components and content between related orgs that have a deployment connection, such as your sandbox and production orgs. Create and test changes in your test environment, and then migrate only those changes to production when they're ready.

Partial deployment with change sets is available for enhanced LWR sites created in Winter '23 and later.

You can use change sets to move partial content for Experience Builder sites using the Digital Experiences component type.

1. Create and test your site in your preferred test org, such as a sandbox.
2. From Setup in your test org, in the Quick Find box, enter `Outbound Change Sets`, and then select **Outbound Change Sets**.
3. Create a change set, and click **Add** in the Change Set Components section.
4. Select the **Digital Experience** component type.
5. Select the content that you want to deploy from the list of components, and then click **Add To Change Set**.

   Tip:

   - To identify which enhanced LWR site each listed component belongs to, use the Type column. The Type column uses the naming convention site/`MySiteName`.
   - To identify what content each listed component represents, use the Name column. The Name column uses the naming convention sfdc_cms__<contentType>/<contentName>. For example, the name sfdc_cms__brandingSet/Build_Your_Own_LWR represents a branding set named Build Your Own LWR.

6. Click **Upload**, and select your target org, such as production.

   Make sure that the target org allows inbound connections. The inbound and outbound orgs must have a deployment connection.
7. From Setup, select **Inbound Change Sets**, and find the change set that you uploaded from your source org.
8. Validate and deploy the change set to make it available in the target org.

   Warning: When you deploy an inbound change set, it overrides the corresponding site content in the target org.
9. Manually reconfigure any unsupported items in the target org site.
10. To make sure that everything works as expected, test your site. Then publish your changes to go live.

Considerations for Deploying Experience Cloud Sites with Change Sets

Keep the following considerations and limitations in mind when migrating your Experience Builder or Salesforce Tabs + Visualforce site with change sets.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, and **Unlimited** Editions

General

- When you deploy an inbound change set, it overwrites the Experience Cloud site in the target org. So although you can't use a change set to delete a component, you can delete the pages within an Experience Builder site. For example, let's say you delete pages from an Experience Builder site in sandbox and then create an updated outbound change set. When you redeploy the change set in a target org, such as production, the pages are also deleted there.
- If you update the Experience Cloud site template in the source org, ensure that you also update the template in the target org before deploying the change set.
- You can't deploy to a target org that's using an earlier release version. For example, if your source org is on Summer '19 (API version 46.0), you can't deploy to a target org on Spring '19 (API version 45.0).

Administration

Administration settings are in Experience Workspaces.

- Remember to add any new or modified profiles or permission sets referenced in **Administration** > **Members** to your outbound change set. They're not automatically included as dependencies.
- For Experience Cloud sites created in a sandbox org before the Summer '17 release, you must resave administration settings before migration to transfer them successfully.
- Until you publish your site in the target org, settings for the change password, forgot password, home, self-registration, and login pages appear to return to their default values.
- To update settings in the Members area and the Login & Registration area, you must deploy the changes in separate change sets. First update and deploy the Members area setting, and then update and deploy the Login & Registration settings.

Navigation Menu

The Navigation Menu component is available in Experience Builder sites.

- For menu items that link to objects, list views are reset to the default list view. Also, custom list views for standard objects aren't included as dependencies.
- Deploying the navigation menu with additional menu items deletes any translations applied to existing menu items in the target environment.

Recommendations

- Updates to recommendation names aren't supported. If you change the name of a recommendation in the source org having previously migrated it, the target org treats it as a new recommendation.
- Recommendation images aren't supported.
- When you deploy an inbound change set, it overwrites the target org's scheduled recommendations with recommendations from the source org.

Partial Deployment for Enhanced LWR Sites

- Partial site content deployment is available for enhanced LWR Experience Cloud sites created in Winter '23 or later.
- To deploy partial site content, make sure that the target org contains an existing site with the same name as the source site.
- Adding a Digital Experience component to your outbound change set also adds that component's variations to the change set. For example, adding the Home view component automatically adds all translations for the Home view.

Unsupported Settings and Features

The following items aren't supported. Manually add them after you deploy the inbound change set.

- Navigational and featured topics
- Audience targeting
- Dashboards and engagement
- Recommendation images
- Branding panel images in Experience Builder
- The following Administration settings in Experience Workspaces:
  - The Account field in the Registration section of the Login and Registration area
  - The **Select which login options to display** option in the Login section of the Login and Registration area
  - The Settings area
  - The Rich Publisher Apps area

SEE ALSO:

Change Sets Best Practices

Change Sets Implementation Tips

Deploy A Full Experience Cloud Site with Change Sets

Deploy Your Experience Cloud Site with the Metadata API

Use Metadata API to move your Experience Cloud site from one Salesforce org to another. Set up and test your site in your test environment, and then retrieve the site's data and deploy it to your production org.

Depending on the site framework, the following metadata types combine to define the site. To successfully migrate a site, use the Metadata API `retrieve` call to retrieve XML file representations of your org's components.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Network
: Represents an Experience Cloud site. Contains administration settings, such as page override, email, and membership configurations.

CustomSite
: Contains the domain and page setting information, including `indexPage`, `siteAdmin`, and URL definitions.

DigitalExperienceBundle and DigitalExperienceConfig *or* ExperienceBundle *or* SiteDotCom
: The metadata type you require varies depending on the site type. Represents the different settings and components, such as pages, branding sets, and themes, that make up a site.

For enhanced LWR sites, introduced in Winter '23 (API version 56.0), DigitalExperienceBundle and DigitalExperienceConfig combine to provide text-based representations of your site elements and settings, but reimagined in a more content-focused structure. You can retrieve editable site metadata, and quickly create, update, publish, and deploy sites programmatically. You can also partially deploy enhanced LWR sites.

For non-enhanced LWR sites, ExperienceBundle provides text-based representations of the site's settings, pages, and components. You can retrieve editable site metadata, and quickly create, update, publish, and partially deploy sites programmatically.

For Aura sites, you can choose to use either ExperienceBundle or SiteDotCom but we recommend using ExperienceBundle. Before Summer '19 (API version 45.0 and earlier), the Network, CustomSite, and SiteDotCom metadata types combined to define an Aura site. However, retrieving the SiteDotCom type produces a binary `.site` file that isn't human readable. See ExperienceBundle for Experience Builder Sites.

For Visualforce sites, Network represents the site.

For additional information on these metadata types and instructions on migrating data, see the Metadata API Developer Guide and the Salesforce CLI Command Reference.

Required Metadata Types at a Glance

The metadata types that you use to deploy a site vary depending on the site type.

Required Metadata Type	Enhanced LWR Site	LWR Site	Aura Site	Visualforce Site
Network	✅	✅	✅	✅
CustomSite	✅	✅	✅	✅
DigitalExperienceBundle	✅			
DigitalExperienceConfig	✅			
ExperienceBundle		✅	✅	
SiteDotCom			ExperienceBundle *or* SiteDotCom	✅

Tips and Considerations

- Before migrating data to another org, enable digital experiences in the destination org and enter the same domain name that you used in your sandbox org to avoid getting an error.
- For each Experience Cloud site, the network component has a unique name and URL path prefix. When you retrieve the network component, the generated XML file name is based on the name of the network. When migrating, the API looks at the file name and, if it exists, updates the site. If it doesn't exist, the API creates a site. If someone changes the site name in the sandbox and then tries to migrate, they see an error. The API is trying to create a site with the existing path prefix.
- Examine the XML file for CustomSite to make sure that all dependencies are brought over. If any are missing, explicitly state them in the XML file.
- In addition to the required components described previously, include all the other components required by your site. Components can include such items as custom objects, custom fields, custom Lightning components, and Apex classes.

- To deploy the Network and Profile components using unlocked packages, create a separate unlocked package for each component and deploy them individually.
- When deploying an Aura site with ExperienceBundle, ensure that the SiteDotCom type isn't included in the manifest file.
- If you rename a site in **Administration** > **Settings**, make sure that the source and target sites have matching values for the `picassoSite` and `site` attributes in the `Network` component.
- If there are any changes to the guest user profile, include the profile as part of the site migration.
- When you migrate user profiles, users are added to the site in the production org. Emails are then sent to members in the same way as for any new site.
- During deployment, make sure that the `NavigationMenu` developer name in the target org is the same as the developer name in the source org.
- If the containerType is CommunityTemplateDefinition, you can't update an existing `NavigationMenu` via Metadata API.
- To deploy an Aura site with a custom template, first retrieve and deploy the CommunityTemplateDefinition and the relevant metadata types, such as CommunityThemeDefinition. Then retrieve and deploy ExperienceBundle or SiteDotCom and the relevant metadata types.
- Deploying the navigation menu with additional menu items deletes any translations applied to existing menu items in the target environment.
- To include navigation menus when you move your site, use the NavigationMenu metadata type.
- You can't deploy to a target org that's using an earlier release version. For example, if your source org is on Summer '19 (API version 46.0), you can't deploy to a target org on Spring '19 (API version 45.0).
- `NavigationLinkSet` was deprecated in Winter '20 (API version 47.0) and replaced by `NavigationMenu`.
- ExperienceBundle doesn't support retrieving and deploying across different API versions. If you're trying to upgrade ExperienceBundle metadata from an earlier API version to a later one—for example, from API version 48.0 to 49.0—take the following steps:
  1. Set the API version in the package.xml manifest file to 48.0 and deploy the package.
  2. Then, set the API version in package.xml to 49.0.
  3. To get the latest ExperienceBundle updates, retrieve the package .
- When deploying a site, you sometimes receive a warning message about invalid ID values. For example: `The topicId property of component 9b8a4e98-e724-4292-bd3c-0813adf9ddc2 references an object with the ID value 0TO4R000000EGPEWA4. Occasionally, when deployed to a destination org, ID values can become invalid—for example, if the referenced ID doesn't exist in the destination org. If you encounter component issues in your destination org, verify that the ID values are correct.`

  In these situations, you can deploy the site successfully despite the warning. However, we recommend verifying in the target org that the object ID referenced in the component is still valid. If the ID is incorrect, manually update the ID to resolve any component issues in the target org. Alternatively, if it's a custom component that you created, consider replacing the object ID with the object's API name instead to avoid the issue in future.

Sample Template

The following sample contains all the fields that you can migrate through the Metadata API.

```
<?xml version="1.0" encoding="UTF-8"?>
<Network xmlns="http://soap.sforce.com/2006/04/metadata">
    <allowInternalUserLogin>true</allowInternalUserLogin>
    <allowMembersToFlag>true</allowMembersToFlag>
    <allowedExtensions>txt,png,jpg,jpeg,pdf,doc,csv</allowedExtensions>
```

```
    <caseCommentEmailTemplate>unfiled$public/ContactFollowUpSAMPLE</caseCommentEmailTemplate>


<changePasswordTemplate>unfiled$public/CommunityChangePasswordEmailTemplate</changePasswordTemplate>

    </communityRoles>
    <disableReputationRecordConversations>true</disableReputationRecordConversations>
    <emailSenderAddress>admin@myorg.com</emailSenderAddress>
    <emailSenderName>MyCommunity</emailSenderName>
    <enableCustomVFErrorPageOverrides>true</enableCustomVFErrorPageOverrides>
    <enableDirectMessages>true</enableDirectMessages>
    <enableGuestChatter>true</enableGuestChatter>
    <enableGuestFileAccess>false</enableGuestFileAccess>
    <enableInvitation>false</enableInvitation>
    <enableKnowledgeable>true</enableKnowledgeable>
    <enableNicknameDisplay>true</enableNicknameDisplay>
    <enablePrivateMessages>false</enablePrivateMessages>
    <enableReputation>true</enableReputation>
    <enableShowAllNetworkSettings>true</enableShowAllNetworkSettings>
    <enableSiteAsContainer>true</enableSiteAsContainer>
    <enableTalkingAboutStats>true</enableTalkingAboutStats>
    <enableTopicAssignmentRules>true</enableTopicAssignmentRules>
    <enableTopicSuggestions>true</enableTopicSuggestions>
    <enableUpDownVote>true</enableUpDownVote>

<forgotPasswordTemplate>unfiled$public/CommunityForgotPasswordEmailTemplate</forgotPasswordTemplate>

    <gatherCustomerSentimentData>false</gatherCustomerSentimentData>
    <lockoutTemplate>unfiled$public/CommunityLockoutEmailTemplate</lockoutTemplate>
    <maxFileSizeKb>51200</maxFileSizeKb>
    <networkMemberGroups>
        <permissionSet>MyCommunity_Permissions</permissionSet>
        <profile>Admin</profile>
    </networkMemberGroups>
    <networkPageOverrides>
       <changePasswordPageOverrideSetting>VisualForce</changePasswordPageOverrideSetting>

        <forgotPasswordPageOverrideSetting>Designer</forgotPasswordPageOverrideSetting>
        <homePageOverrideSetting>Designer</homePageOverrideSetting>
        <loginPageOverrideSetting>Designer</loginPageOverrideSetting>
        <selfRegProfilePageOverrideSetting>Designer</selfRegProfilePageOverrideSetting>
    </networkPageOverrides>
    <picassoSite>MyCommunity1</picassoSite>
    <selfRegistration>true</selfRegistration>
    <sendWelcomeEmail>true</sendWelcomeEmail>
    <site>MyCommunity</site>
    <status>Live</status>
    <tabs>
        <defaultTab>home</defaultTab>
        <standardTab>Chatter</standardTab>
    </tabs>
    <urlPathPrefix>mycommunity</urlPathPrefix>
    <welcomeTemplate>unfiled$public/CommunityWelcomeEmailTemplate</welcomeTemplate>
</Network>
```

Sample `package.xml` Manifest File

A manifest file defines the components that you're trying to retrieve. The following sample shows a `package.xml` manifest file for retrieving all the components of an Experience Builder site.

```
<?xml version="1.0" encoding="UTF-8"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
    <types>
        <members>*</members>
        <name>Network</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomSite</name>
    </types>
    <types>
        <members>*</members>
        <name>ExperienceBundle</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomTab</name>
    </types>
    <types>
        <members>*</members>
        <name>CustomObject</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexClass</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexPage</name>
    </types>
    <types>
        <members>*</members>
        <name>ApexComponent</name>
    </types>
    <types>
        <members>*</members>
        <name>Portal</name>
    </types>
    <types>
        <members>*</members>
        <name>Profile</name>
    </types>
    <types>
        <members>*</members>
        <name>Document</name>
    </types>
```

```
    <version>46.0</version>
</Package>
```

SEE ALSO:

Deploy A Full Experience Cloud Site with Change Sets

Manage Your Experience Cloud Site

Administer, manage, and moderate your Experience Cloud site from Experience Workspaces.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Managers, Moderators, and Admins Working Together

Experience Cloud sites can thrive when their managers, moderators, and admins understand their unique roles and work together effectively.

Experience Cloud Site Moderation Strategies and Tools

Moderation allows you to empower members of your Experience Cloud site to monitor content and ensure that it's appropriate and relevant. Set up rules to automate moderation and do the heavy lifting for you.

Organize Experience Cloud Sites with Topics

Navigational, featured, and content topics are a fantastic way to organize information and content in an Experience Cloud site and boost SEO for your articles. Use topics to structure your site's content or highlight key discussions. You can create topics or use the topics that organically emerge from site member posts.

Customize Recommendations in Experience Cloud Sites

Create recommendations to drive engagement for your Experience Cloud site, encouraging users to watch videos, take trainings, and more. Target specific audiences and use channels to specify locations for the recommendations.

Gamification

Use gamification tools, like Recognition Badges and Reputation, to keep your members engaged in your site.

Share a Link to Your Experience Cloud Site

You can allow members to preview your Experience Cloud site before making it active.

Switch Between Your Salesforce Org and Your Experience Cloud Sites

If you use Experience Builder sites and Lightning Experience, use the App Launcher to switch back and forth between your Salesforce org and your Experience Cloud sites associated with it. If you use Tabs + Visualforce sites and Salesforce Classic, use the global header. You can embed a site URL directly into buttons or links. You can also redirect a user to another site or to a specific page within another site.

Managers, Moderators, and Admins Working Together

Experience Cloud sites can thrive when their managers, moderators, and admins understand their unique roles and work together effectively.

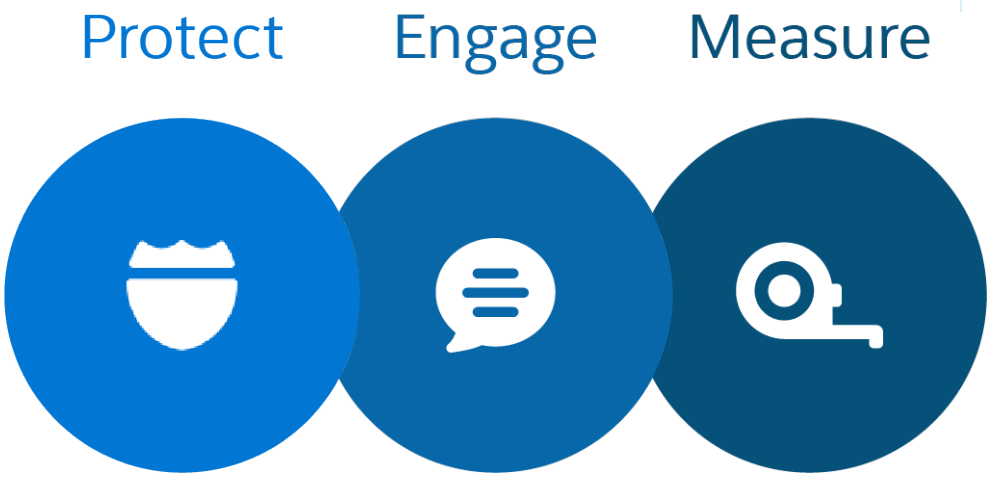
An Experience Cloud site manager and moderator work hand-in-hand. They're partners and support one another in fostering engagement and harmony. Sometimes, they perform some of the same tasks, but each has unique contributions. The site manager monitors adoption and engagement and the moderator ensures that the site is a healthy environment and that members feel encouraged to be active and helpful to each other.

Experience Cloud site managers, moderators, and admins all work together to protect, engage, and measure a site's success.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions



Prevent spammers, bots, and trolls from attacking the site.

Protect the site from trademark infringement and legal issues.

Ensure site members use appropriate language and adhere to the terms of use.

Welcome new members, add contributors, and connect members with resources.

Help ensure that members questions are answered quickly.

Acknowledge helpful members and thank them.

Identify, encourage, groom, and retain MVPs.

Review analytics on community health.

Measure return on investment (ROI) and key performance indicators (KPI), such as money saved and cases deflected.

Identify and track community trends.

What's an Experience Cloud Site Manager?

Experience Cloud site managers help ensure that a site thrives by encouraging member participation.

What's an Experience Cloud Site Moderator?

Experience Cloud site moderators help ensure the success of a site by monitoring user activity and flagged items.

What's an Experience Cloud Site Manager?

Experience Cloud site managers help ensure that a site thrives by encouraging member participation.

Experience Cloud site managers must be internal site users.Site managers must also be members of the site that they're managing.

A site manager monitors engagement. They need access to reports and dashboards that show activity and membership trends, such as how frequently members log in. By monitoring site membership and activity, managers can better engage site members and encourage participation.

Member recognition and friendly competition can also lead to more active members. Experience Cloud site managers can set up a points system and reputation levels that reward members when they perform certain actions. When members reach the level's point threshold, they move up a level.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Assign an Experience Cloud Site Manager

To assign a user as an Experience Cloud site manager, give them the Manage Experiences permission.

Assign an Experience Cloud Site Manager

To assign a user as an Experience Cloud site manager, give them the Manage Experiences permission.

Experience Cloud site managers must be internal site users. Site managers require the Manage Experiences permission so that they can access Experience Workspaces.

Note: To enable Experience Workspaces, go to **Digital Experiences** > **Settings**.

1. From Setup, in the Quick Find box, enter `Permission Sets`, select **Permission Sets**, and then click **New**.
2. Create a permission set for the Manage Experiences permission.
3. Go to **System** > **System Permissions**, and click **Edit**.
4. Select **Manage Experiences**, and save your changes.
5. From Setup, in the Quick Find box, enter `Users`, and then select **Users**.
6. Add the new permission set to the managing user's Permission Set Assignments related list.

The user can now manage the site through Experience Management or Experience Workspaces.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

What's an Experience Cloud Site Moderator?

Experience Cloud site moderators help ensure the success of a site by monitoring user activity and flagged items.

In a successful site, members are actively engaged and communicate with one another. Moderators facilitate knowledge sharing to help members benefit and derive value from their participation. Moderators also ensure that all communications and content are appropriate.

A moderator can control the quality of the site's content by:

- Reviewing and acting on the list of flagged posts and comments
- Reviewing and acting on the list of flagged files
- Removing flags
- Deleting inappropriate posts, comments, messages, and files

A moderator can help drive the success of a site by:

- Sharing relevant and useful information in posts
- Encouraging members to post and comment on each other's posts
- Setting an example by their activity
- Keeping discussions focused, spam-free, and non-controversial
- Redirecting email conversations to sites when it can benefit other members
- Establishing the site as a reliable source of information and a forum for transparent discussions

You can choose to designate more than one moderator, especially if the site has a large number of members.

Note: Although they share some similar capabilities, a moderator in an Experience Cloud site is different from a Chatter moderator.

Which Users Can Moderate a Site?

Multiple types of users can moderate an Experience Cloud site. Moderators can continue to flag items even if flagging is disabled for members. Group owners and group managers can only moderate when flagging is enabled.

- Internal Users—Moderators can be internal users who are also members of your site.
- External Users—Moderators who are external users require Access Experience Management and moderation permissions to moderate a site from the Moderation tile in Experience Workspaces. External user moderators without management and moderation permissions can moderate within the context of their Experience Cloud site, such as directly from the site feed.
- Group Manager or Owner—The `Allow members to flag content` option must be enabled for group managers and owners to moderate. Group managers or owners can only moderate items in groups that they manage or own.

This table shows who can moderate and what actions they can take in the user interface.

Action	User with Moderate Experiences Feeds	User with Moderate Experiences Files	Group Owner or Manager (on items in groups they own or manage)
Remove flags on a post or comment	✅		✅
Delete a post or comment	✅		✅
Remove flags on a file		✅	✅
Delete a file[1]		✅	✅

[1] Deleted files can remain cached for up to 90 days.

Assign a Moderator

Make one or more people moderators in your Experience Cloud site so they can keep an eye on its content.

SEE ALSO:

Move Feed Items from One Public Group Feed to Another

Assign a Moderator

Make one or more people moderators in your Experience Cloud site so they can keep an eye on its content.

Moderators can be users from your internal org or external users with Access Experience Management and moderation permissions. External users who are moderators but don't have management and moderation permissions can moderate within context of the Experience Cloud site, such as directly in the site feed.

You can assign moderators by assigning a permission set that includes one or more of these moderation permissions.

Permission	Lets Users
Moderate Experiences Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Moderator options for feed content are available in the site feed and in Experience Management and Experience Workspaces.
Moderate Experiences Files	Review flagged files they have access to and take action, such as removing flags or deleting the file. Moderator options for files are available on a file's detail page and in Experience Management or Experience Workspaces.
Moderate Experiences Chatter Messages	Review flagged messages and take action, such as removing a flag or deleting a message. This permission allows users access to flagged messages only in Experience Cloud sites they're a member of.
Can Approve Feed Post and Comment	Approve, delete, or edit posts and comments that are pending review.
Moderate Experience Users	Freeze external users who are members. Moderators can freeze members on their user profile page or from an Insights report.
Manage Experiences	Moderate content in Experience Management or Experience Workspaces.
Access Experience Management	Access site pages from Experience Management and Experience Workspaces.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

You can also add these permissions to a profile. These permissions are valid for all Experience Cloud sites the user is a member of, but don't apply in your internal org.

1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the appropriate permissions.
3. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
4. Find the user you want to be a moderator and add the permission set to their Permission Set Assignments related list.

After you grant moderator permissions to a user, keep these things in mind.

- The user can now moderate any items they have access to in all Experience Cloud sites they're a member of.
- The user can flag items even if `Allow members to flag content` is disabled in a site.

- Moderators can receive an email notification when a post, comment, or file is flagged by selecting the `Flag an item as inappropriate` email notification.

Experience Cloud Site Moderation Strategies and Tools

Moderation allows you to empower members of your Experience Cloud site to monitor content and ensure that it's appropriate and relevant. Set up rules to automate moderation and do the heavy lifting for you.

Moderation is crucial for an Experience Cloud site to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your site are appropriate and helpful. It's also critical to empower members to speak up when they view something as inappropriate or offensive.

With moderation, you can:

- Designate specific users as moderators so that they can closely monitor the site
- Allow members to flag posts, comments, files, and messages that are inappropriate or spam
- Allow moderators to review and act on flagged items, such as deleting a post, comment, or file
- Allow group owners and managers to moderate within their groups
- Create rules and criteria to automatically block, flag, replace keywords in member-generated content, such as posts or comments
- Create rules to review and approve content from specific members
- Track flagging and moderation activity within your site

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

To limit the size and types of files allowed in your site, in Experience Workspaces, go to **Administration** > **Preferences**.

To report on moderation activity in your sites, you can use the preconfigured reports from AppExchange. For more information about the AppExchange package, see Report on Experience Cloud Sites with AppExchange Packages. You can also query flagged content or activity using the API, or create a custom report type using `Networks` as the primary object.

If you want to create custom advanced moderation logic for your Experience Cloud site, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

If your org is using Transaction Security, moderation offers some of the same functionality. Transaction Security and moderation can be used at the same time.

Track Experience Cloud Site Activity with the Moderation Overview Page

Moderation Insights are arranged in clickable tiles on the Moderation Overview page in Experience Workspaces. View the entire picture of your site's moderation activity at a glance and take action on day-to-day moderation tasks.

Enable Members to Flag Items in Your Experience Cloud Site

Turn on flagging for your Experience Cloud site to let members flag posts, comments, files, and messages that they deem inappropriate.

Create Criteria to Moderate Your Experience Cloud Site

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Create Rules to Moderate Your Experience Cloud Site

Moderation rules help protect your site from spammers, bots, and offensive or inappropriate content. Create and modify rules for your Experience Cloud site to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take.

Review and Approve Posts and Comments in Your Experience Cloud Site

Moderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your Experience Cloud site. Posts and comments pending review aren't displayed in the feed; only the author and moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the feed and in Experience Workspaces.

Moderate Flagged Items in Your Experience Cloud Site

Moderators can review and act on flagged items in their Experience Cloud sites.

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your Experience Cloud site.

Experience Pulse

Experience Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create ones to meet your needs.

Experience Cloud Site Moderation Limits and Limitations

Moderation limits ensure that your Experience Cloud site performs optimally.

SEE ALSO:

Assign a Moderator

Assign an Experience Cloud Site Manager

Limit Files in Your Experience Cloud Site

Track Experience Cloud Site Activity with the Moderation Overview Page

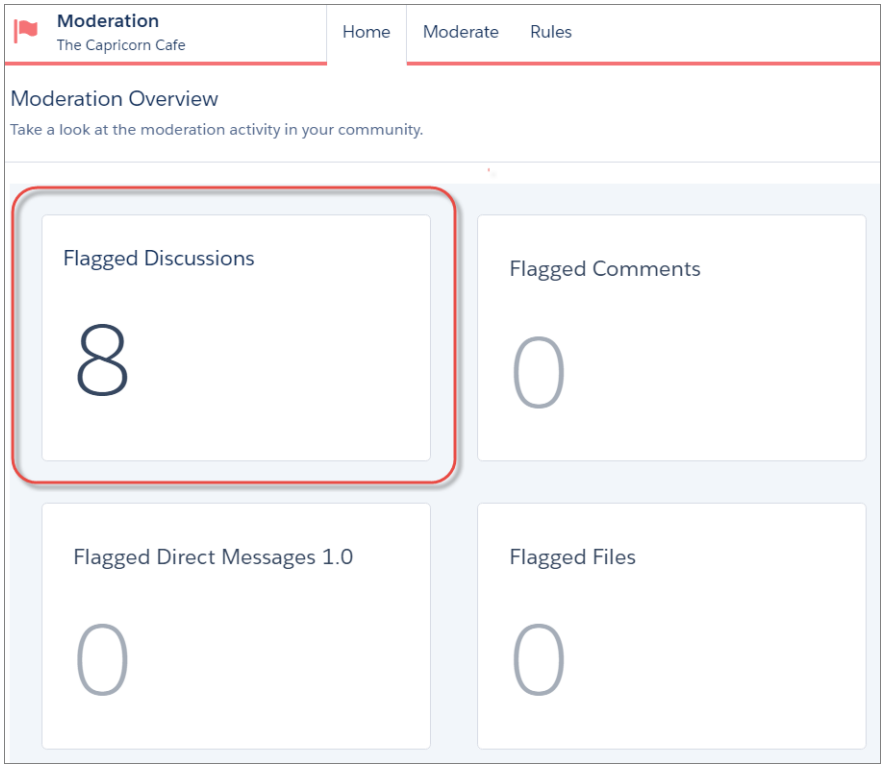
Moderation Insights are arranged in clickable tiles on the Moderation Overview page in Experience Workspaces. View the entire picture of your site's moderation activity at a glance and take action on day-to-day moderation tasks.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Example: To view all flagged posts and comments, click **Flagged Discussions** and go directly to the Flagged Discussions queue. You can approve or delete flagged posts and comments in bulk, directly from the queue.



Tip: Let us do the setup work for you! Install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange.

Insight reports provided in the package are 100% customizable. You can change the default Insights page names, report folder mappings, and even the Insights report columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

Enable Members to Flag Items in Your Experience Cloud Site

Turn on flagging for your Experience Cloud site to let members flag posts, comments, files, and messages that they deem inappropriate.

If you haven't already, install the Salesforce Communities Management (for Communities with Chatter) package from AppExchange.

The `Allow members to flag content` preference enables:

- Members to flag posts, comments, and files using the `Flag as inappropriate` option.
- Members to flag messages from within the Experience Cloud site on their My Messages page in Chatter. If a member has turned on email notification for messages, they can also flag the message directly from their email. Members can only flag messages that are sent from sites they're members of.

  Note: Messages can't be flagged in partner or customer portals, your internal org, or from the Salesforce mobile app.

- Group owners and managers to moderate the groups they own or manage.

This setting isn't required to flag or moderate items using the API.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**, then select **Allow members to flag content**.
3. Click **Save**.

If you want to create custom advanced moderation logic for your Experience Cloud site, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To allow members to flag items:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

SEE ALSO:

Assign a Moderator

Create Criteria to Moderate Your Experience Cloud Site

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To view, create, edit, and delete criteria:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Plan Your Use Cases

Before creating your member criteria, think about what you want to do.

- Do you want to protect your site from bots and spammers? Most spammers attack shortly after they've joined. Set up member criteria based on a user's creation date.
- Do you want to review members' first posts? Set up member criteria that target users without contributions.
- Do you want to moderate your internal users' activity? Set up member criteria to include only your internal users.
- Do you want to be notified when a partner contributes for the first time? Set up member criteria to include only your partner users that don't have contributions.

Before creating content criteria, think about what you want to moderate.

- Do you want to moderate profanities and slang? Set up separate keyword lists for each group of related words.
- Do you want to replace competitor product names with asterisks? Create a keyword list just for your competitor products.
- Do you want to monitor content for HIPAA compliance? Create a keyword list that alerts of possible HIPAA violations.

You can also use the Metadata API or Tooling API to set up keyword lists.

Create Content Criteria

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your Experience Cloud site. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

Some things to keep in mind:

- Your org can have up to 30 keyword list criteria. This limit is per org, not per Experience Cloud site.
- A keyword list can have up to 2,000 keywords.
- Capitalization and trailing punctuation are ignored when matching your keywords to user-generated content. For example, if your criteria include `BadWord`, it's matched when a user types `BADWORD` or `badword.`

Set up content criteria to use in your moderation rules.

1. Open Experience Workspaces.
2. Click **Moderation** > **Content Criteria** > **New**.
3. Enter a name, unique name, and description for your criteria.
4. Click **Save**.
5. Update the keywords in your criteria.

   To add keywords, click **Add**.

   - Keywords can only be up to 100 characters and can include letters, numbers, spaces, and special characters.
   - Wildcard characters aren't supported.

- Separate keywords with commas or line breaks.
- When adding keywords, you can copy and paste up to 32,000 characters at a time.

Tip: To cover different variations of the same word, you can use special characters and spaces. For example:

```
bad-word
b@dword
b a d w o r d
```

To delete keywords, select the keywords you want to remove, then click **Delete**.

A message indicates how many keywords were added or failed to add, and the number of duplicates that were ignored. If your entire entry failed to save, review the keyword requirements and then submit again. Don't worry about adding duplicates because they're ignored.

To delete criteria, click **Del** from the Content Criteria page. If criteria are being used by a rule, you can't delete them.

Create Member Criteria

Create and modify member criteria to use in moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the Experience Cloud site. Use member criteria in your rules to help pin-point specific use cases, like reviewing posts only from your customer users who were created in the last seven days.

Some things to keep in mind:

- Your org can have up to 100 member criteria. This limit is per org, not per Experience Cloud site.
- Each member criteria can include up to 100 user conditions.

You can create criteria that include only user types and user profiles, or just filters. Or if you want it all, your criteria can include user types, user profiles, and filters. Let's get started.

1. Open Experience Workspaces.
2. Click **Moderation** > **Member Criteria**, then click **New**.
3. Enter a name, unique name, and description for your criteria.
4. Select the types of user types or user profiles to include in your criteria.

   You can select any combination of types and profiles. Members are included when they belong to *any* one of your selections.

   If you delete a profile in your internal org, the profile is also removed from your member criteria.

5. Select to filter your members by:
   - `None`—Select this option if you don't want to filter the criteria using the other options. None is the default selection.
   - `User creation date`—Select this option to include only users that were created within a specific time frame. Enter the number of days since the user was created.

     Note: A user's creation date might not be the same date they became a member of the Experience Cloud site. For example, you can have an internal user that was created 120 days ago who became a member of the site five days ago. For users that self-register, their creation date is the date they become a member of the site.

   - `Members without site contributions`—Select this option to include only members that haven't posted or commented in the Experience Cloud site. Posts that are pending review don't count as contributions until they're approved.

   If you selected user types or user profiles, and you also select filter conditions, members are included only if they belong to one of the selected user types or profiles *and* the filter condition.

6. Click **Save** to apply your changes.

Example: Let's look at the following conditions:

`User Types`: Partner

`User Profiles`: Customer Community Plus Login User, Customer Community Plus User, and Customer Community User

`Filter By`: User creation date is set to seven days since the user was created

This member criterion applies to:

- Partner users created in the last seven days
- Customer Community Plus Login User created in the last seven days
- Customer Community Plus User created in the last seven days
- Customer Community User created in the last seven days

You can use this member criteria in a rule to:

- Review and approve their posts
- Be notified of their contributions
- Flag all their contributions

To delete criteria, click **Del** from the Member Criteria page. If criteria are being used by a rule, you can't delete them.

Create Rules to Moderate Your Experience Cloud Site

Moderation rules help protect your site from spammers, bots, and offensive or inappropriate content. Create and modify rules for your Experience Cloud site to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take.

Your Experience Cloud site comes populated with content and rate limiting moderation rules that block, flag, freeze, replace, or review banned keywords. Simply activate the rules and they're ready to go. You can customize both the rules and the list of banned keywords in the Rules section of the Moderation workspace.

Alternatively, you can create your own custom moderation rules as needed. You can also use the Metadata API or Tooling API to set up content rules.

If your Experience Cloud site uses the Customer Service template, moderation rules apply to questions and group posts created by your members. If your Experience Cloud site uses Salesforce Tabs + Visualforce, moderation rules can also run on publisher actions.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per Experience Cloud site. This limit includes both content rules and rate rules.
- Each content rule can have up to 3 keyword criteria and 10 member criteria. And each rate rule can have up to 10 member criteria.
- Preconfigured moderation rules apply only to feed posts, comments, and polls.

Tip: Before creating a rule, we recommend that you create criteria to use in the rule.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura sites

USER PERMISSIONS

To view, create, edit, and delete rules:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

When Do Moderation Rules Run?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want moderators to review the original content. On the server, Salesforce executes Experience Cloud site rules within the standard order of execution.

SEE ALSO:

Translate Metadata Labels

Create Content Criteria

Create Member Criteria

Create or Modify Content Rules

To block, replace, flag, or allow you to review and approve member-generated content, create content rules.

1. Open Experience Workspaces.
2. Click **Moderation** > **Rules**.
3. Click **Edit** next to an existing rule. To create a rule, click **New** > **Content Rule**.
4. Add or update the rule details, including a unique name that's used by the API, and select **Activate Rule** to enable the rule.
5. In Rule Conditions:
   - Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
   - Choose whether to block content from being published, allow reviewers to approve the content before it's published, replace keywords with asterisks, or flag inappropriate content.
   - Specify the message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use `%BLOCKED_KEYWORD%` or other inappropriate words in this site. Review your content and try again." The `%BLOCKED_KEYWORD%` variable displays up to 5 blocked words. You can also use this variable in your own custom message.

     For international sites, you can translate this message. From Setup, enter `Translate` in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the site the rule belongs to.
6. In Criteria, specify member criteria and content criteria to enforce this rule. Think about who the rule applies to and the specific keywords involved.
7. Save your changes.

Keep the following things in mind:

- If you activate a content rule without specifying member criteria, the rule applies to all members.
- If you activate a content rule without specifying content criteria, the rule either:
  - Stops members from creating posts and comments entirely
  - Sends all posts for review
  - Flags all posts and comments
- If you select member criteria and content criteria, the rule applies only when both criteria are met.

- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

Create Rate Limit Rules

To monitor and limit how frequently member-generated content is created, create or modify rate rules. Rate rules protect your Experience Cloud site against spammers and bots that attack your site by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

Each rate rule controls two actions: notification and freeze. You can set up your rate rule for both actions or just one. You can apply the rule to: posts, comments, files, and private messages. In Experience Cloud sites that use the Customer Service template, you can apply rules to questions and answers.

1. Open Experience Workspaces.
2. Click **Moderation** > **Rules** then click **New** and select **Rate Rule**.
3. In Rule Conditions:
   - Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles.
   - Specify the member criteria that trigger this rule. If you activate a rate rule without specifying member criteria, the rule applies to all external users. If you activate a rate rule without specifying member criteria, the rule applies to all external users.

     Spammers are typically new members. We recommend creating member criteria that only include customer users that were created in the last seven days.
   - Specify the time frame that the rule applies to. Determine how much content can be created within that time frame before the moderator is notified. Determine how much content can be created before the member is frozen.

     When members are frozen, they're frozen in all sites that they're a member of.

     Emails are sent to users with the Moderate Experience Users permission. Make sure that you assign your moderators this permission. Emails are sent even if a user has turned off Chatter emails.
4. Activate the rule.
5. Save your changes.

Example: Let's use the following rate rule as an example.

`Applies To`: Posts and private messages

`Member Criteria`: Customer users created in the past 7 days

`Content Creation Time Frame`: 3 minutes

`Notify Moderators`: 6

`Freeze Members`: 10

With this rate rule, here's what happens when a member reaches your limits.

In the span of 3 minutes, a member creates...	Is the moderator notified?	Is the member frozen?
4 posts and 2 private messages	✔	✘
6 posts	✔	✘
6 comments	✘	✘
8 posts and 2 private messages	✔	✔

In the span of 3 minutes, a member creates...	Is the moderator notified?	Is the member frozen?
10 posts	✔	✔
10 comments	✘	✘

A rate rule with these values protects the site from spammers and bots but also allows you to help your new members. Maybe a non-threatening member posted a question over and over hoping to get it answered faster. Rate rules do more than protect—they let you help members in need.

Here's a rule set up just for private messages.

`Applies To`: Private messages

`Member Criteria`: Customer users created in the past 3 days

`Content Creation Time Frame`: 15 minutes

`Notify Moderators`: 1

`Freeze Members`: 3

This rate rule protects the site from spammers that attack via private messages.

If your rate rule doesn't take immediate effect, give it time. If you set up a rate rule to freeze members when they create content 10 times in 3 minutes. It's possible for a member to create 9 items towards the end of the first 3-minute time frame. In this case, the member isn't frozen until they post another 10 items in the second 3-minute time frame.

Check the member criteria you're using. For example, let's say you have a rate rule that uses member criteria to filter for members without contributions. After a member's first post or comment, the rule doesn't apply to the member anymore, so the member doesn't reach the freeze limit you set.

Review and Approve Posts and Comments in Your Experience Cloud Site

Moderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your Experience Cloud site. Posts and comments pending review aren't displayed in the feed; only the author and moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the feed and in Experience Workspaces.

Note: The Can Approve Feed Post and Comment permission applies not only to moderation but also to any Chatter feed a user can access. In other words, an assigned user can edit or delete any post or comment. They can take these actions whether in an Experience Cloud site or their internal Salesforce org, in any feed they have access to.

To set up a moderation rule to review and approve posts and comments, in Experience Workspaces, go to **Moderation** > **Rules** and create a content rule that uses the `Review` action. Here are some ways that you can use rules to review content.

Self-Service

Does your site allow members to self-register? You can set up a rule to review and approve questions from all your self-registering users. Use member criteria that includes only your guest user profile and filters for members who were created in the past seven days.

Have spammers ever attacked your site? Use member criteria that includes only your guest user profile and filters for members that have never contributed.

Partners

Want to ensure that your partners aren't discussing a recent acquisition or other sensitive transactions? You can set up a rule to review posts and comments that include keywords such as "acquisition" or "merger."

Employees

Does your site require HIPAA compliance? Set up your rules to review posts and comments from all your employees.

Note: Users must have Manage Experiences or Create and Set Up Experiences permissions to create moderation rules.

Pending Review is displayed in the header of the post or comment until it's approved. Remember that while a post or comment is pending approval, the author can still edit or delete it, however they can't comment on it. An author can see a pending comment on a pending post only if the author posted both. To prevent the author from editing the post or comment, you can disable feed post editing for certain users.

There are two ways to review and approve posts and comments.

- Use the preconfigured Pending Discussions Insights report on the Moderation Overview page in Experience Workspaces.

  To get this report, install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange. Use the Pending Discussions report to see all the posts and comments that are pending review. The report displays the contents of posts and comments so you can quickly assess whether that content is spam or harmless. You can then approve or delete the item directly from the report. You can also perform mass-action and approve multiple items at once.

- Approve posts and comments directly in the feed.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To approve, delete, or edit posts and comments that are pending review:

Note: An author can see a pending comment on a pending post only if the author posted both.

- Can Approve Feed Post and Comment

To approve, delete, or edit posts and comments that are pending review:

- Can Approve Feed Post and Comment

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

In the feed, users with the Can Approve Feed Post and Comment permission see an extra action in the post or comment dropdown menu. If the item is inappropriate, they can delete it. If it has a typo, they can edit it.

After the item is approved, the author receives an email letting them know the item is approved and providing a link to it. Email notifications, such as @mentions notifications, are sent only after the item is approved.

SEE ALSO:

Create or Modify Content Rules

Feed Post and Comments Editing Overview

Moderate Flagged Items in Your Experience Cloud Site

Moderators can review and act on flagged items in their Experience Cloud sites.

If you haven't already, install the Salesforce Communities Management (for Communities with Chatter) package from AppExchange. This package automatically installs multiple insight reports that you can use to moderate your site, such as the Flagged Private Messages and Flagged Files reports. It also automatically installs the Flagged Discussions and Flagged Direct Messages tiles to the Moderation tile in Experience Workspaces.

A small orange flag appears next to flagged items. The number next to the flag indicates how many people have flagged the item.

A few things to keep in mind.

- Moderators can only moderate items that they have access to.
- Group owners or managers can moderate items in their groups.
- Members can only flag messages sent from sites that they're a member and that allow members to flag content.
- You can't flag items from your internal org, the Salesforce mobile app, or in partner and customer portals.
- Site members can only flag items if the `Allow members to flag content` preference is enabled.
- If `Allow members to flag content` is disabled, only moderators can flag items and view flagged items.
- To receive an email each time an item is flagged, select **Flags an item as inappropriate** on your Email Settings page.

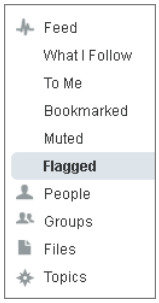
Flagged Posts and Comments

Moderators can review, delete, and remove flags from posts and comments that members flag as inappropriate. Group owners or group managers can review and moderate flagged posts and comments in their groups.

You can moderate flagged posts and comments from:

- The Flagged Discussions tile on the Moderation tile in Experience Workspaces.
- The Flagged feed in Chatter.

  If you're using a Salesforce Tabs + Visualforce Experience Cloud site, you can see a list of flagged posts and comments on the Chatter menu. To see the Flagged feed, enable the `Allow members to flag content` preference.



USER PERMISSIONS

-

To moderate posts and comments:

- Moderate Experience Cloud Site Feeds

  AND

  Manage Experiences OR Create and Set Up Experiences

  AND

  Can Approve Feed Post and Comment

  AND

  Is a member of the Experience Cloud site

- A custom list. You can expose a list of flagged posts and comments using Connect REST API or ConnectApi in Apex.
- The link to the post or comment from the notification email.
- The Experience Cloud site. Moderators can remove flags or delete content in the feed.

Flagged Private Messages

Moderators can review, delete, and remove flags from private messages that members flag as inappropriate or as spam.

Important: Ensure that your moderators are assigned the Moderate Experiences Chatter Messages permission, *not* the Manage Chatter Messages permission. The Manage Chatter Messages permission allows users to see *all* the messages in your entire Salesforce org.

You can monitor and manage flagged messages from:

- The Flagged Private Messages Insights report from the Moderation Overview page in Experience Workspaces. You can track trends and monitor spam. You can view flagged messages, who sent them, the date they were sent, and who flagged them. You can also remove flags from messages and delete messages.
- A custom report.

  First, create a custom report type using `Networks` as the primary object and `Network Audits` as the secondary object. Create the report using your new custom report type and add a field filter for `Audited Object Type` set to equal `Chatter Message`. Use the API to delete flagged messages.
- An API query of flagged messages.

USER PERMISSIONS

To moderate messages:

- Moderate Experiences Chatter Messages

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To view the contents of a flagged message in reports:

- Moderate Experiences Chatter Messages

To remove flags or delete messages in the SOAP API:

- Modify All Data

Flagged Direct Messages

Members can flag messages in Experience Cloud sites built using the Customer Service template. Moderators can review, delete, and remove flags from direct messages that members flag as inappropriate or spam.

Note: Private messages and direct messages are separate features. Direct messages offer a richer set of features for private communication. Direct messages are based on Chatter and offer a rich text editor that supports inline images and attachments. With direct messages, you can start a message from a feed post.

1. Open Experience Workspaces.
2. Select **Moderation** and either click the Flagged Direct Messages tile or click **Moderate** > **Flagged Messages** to see the flagged items.
3. Review and act on the flagged messages.

USER PERMISSIONS

To view and moderate flagged direct messages:

- Moderate Experiences Chatter Messages

  AND

  Moderate Chatter Messages and Direct Messages

  AND

  Moderate Experiences Feeds

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To make all posts available to moderation, including direct messages, in Digital Experiences Settings under Moderation Rule Settings:

- Moderation applies to all feed posts regardless of where they're visible

Flagged Files

Moderators can review, delete, and remove flags from files that members flag as inappropriate or spam. Group owners or group managers can moderate files in their groups.

Members can flag files that they deem inappropriate because they contain sensitive information or offensive content.

You can moderate flagged files from:

- The Flagged Files Insights report on the Moderation Overview page in Experience Workspaces. With this report, you can see flagged files, who created them, who flagged them, and how many flags each file has. You can click a link to open a file and review its content. You can remove the flag or delete the file. You can also select multiple items at once.

  Note: After you delete a file, it remains cached for up to 90 days.

- A custom list. You can expose a list of flagged files using Connect REST API or ConnectApi in Apex.
- From the Experience Cloud site. You can remove flags or delete content on the file detail page.

To limit the size and types of files allowed in your site, go to **Administration** > **Preferences**.

USER PERMISSIONS

To view the file detail page, remove flags, and delete files:

- Moderate Experiences Files

To moderate files:

- Moderate Experiences Files

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Flagged Discussions

Moderators can review, delete, and remove flags from posts and comments on discussions, and freeze or communicate with the author of those posts, all from one place.

Moderators can view an entire discussion in context, including all comments related to a post, and sort by the newest discussions or the oldest. To access a list of flagged discussions, go to **Experience Workspaces** > **Moderation** > **Flagged Discussions**. To open a discussion thread, click **View Discussion**.

USER PERMISSIONS

To view flagged items, remove flags, and delete posts or comments:

- Moderate Experiences Feeds

To moderate posts and comments:

- Moderate Experience Cloud Site Feeds

  AND

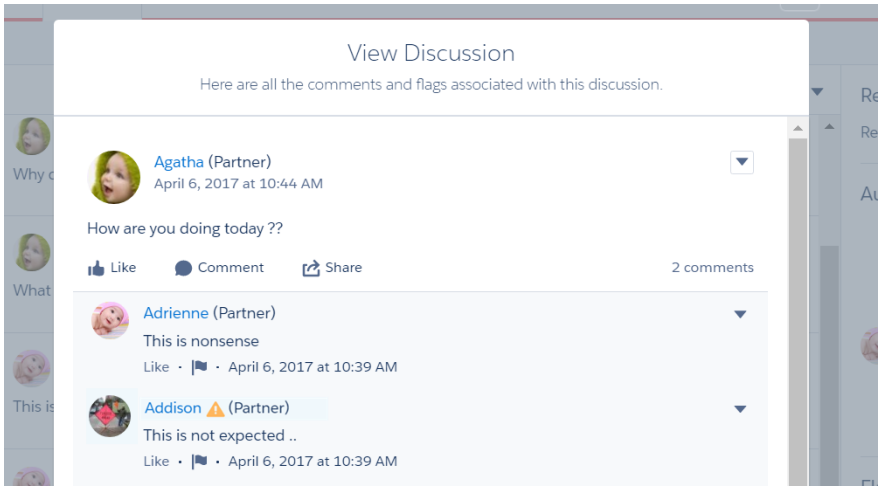
  Manage Experiences OR Create and Set Up Experiences

  AND

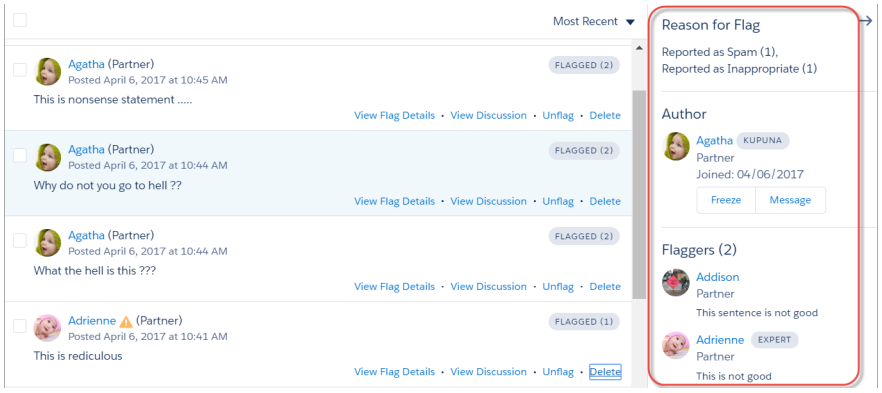
  Can Approve Feed Post and Comment

  AND

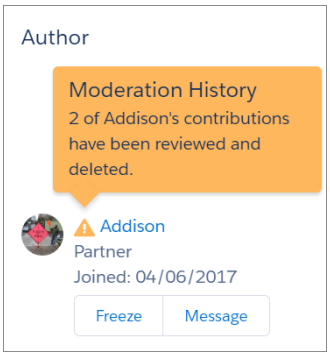
  Is a member of the Experience Cloud site



To see how a post or comment was flagged and who flagged it, click a post or comment or select **View Flag Details**. You can remove the flag or delete the post or comment.



You can see which authors have a history of flagged posts and how many times a moderator deleted their posts. You can also freeze the author and send them a message.



SEE ALSO:

Guidelines for Deleting Your Users' Chatter Messages

Report on Experience Cloud Sites with AppExchange Packages

SOAP API Developer Guide: ChatterMessage

Apex Developer Guide: Moderate Chatter Private Messages with Triggers

Connect REST API Developer Guide: Experience Cloud Sites Moderation Resources

Apex Reference Guide: CommunityModeration Class

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your Experience Cloud site.

Tip: Did you know you can do this in the UI? Most sites don't need custom moderation triggers. You can create moderation rules and criteria directly in Experience Workspaces. For more information, see Create Rules to Moderate Your Experience Cloud Site.

Using triggers to automatically flag items allows you to moderate your Experience Cloud site behind the scenes. These flags are **only** visible to moderators. You can view flags in Experience Workspaces., query for them in the API, or use custom report types to create reports on flagged items, people whose items are flagged most, and more.

Consider the following when creating triggers:

- Create Apex after insert triggers on FeedItem, FeedComment, ChatterMessage, or ContentDocument.
- Define criteria that when met creates a NetworkModeration (flag) record, with the FeedComment, FeedItem, ChatterMessage, or ContentDocument as the parent.

Example: This trigger automatically flags posts in your site that contain *BadWord*.

```
trigger autoflagBadWordOnPost on FeedItem (after insert) {

    List<NetworkModeration> flags = new
List<NetworkModeration>();

    for (FeedItem rec : trigger.new) {
        if (!<NetworkId>.equals(rec.networkScope)){
            continue;
        }
```

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create triggers:

- Modify All Data

```
        if (rec.body.indexOf('BadWord') >= 0) {
           NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility
 = 'ModeratorsOnly');
            flags.add(nm);
        }
    }

    if (!flags.isEmpty()) {
        insert(flags);
    }
}
```

A similar trigger on comments would look like this.

```
trigger autoflagBadWordOnComment on FeedComment (after insert) {
    List<NetworkModeration> flags = new List<NetworkModeration>();

    for (FeedComment rec : trigger.new) {
        if (!<NetworkId>.equals(rec.networkScope)) {
            continue;
        }

        if (rec.commentBody.indexOf('BadWord') >= 0) {
           NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility
 = 'ModeratorsOnly');
            flags.add(nm);
        }
    }

    if (!flags.isEmpty()){
        insert(flags);
    }
}
```

SEE ALSO:

SOAP API Developer Guide

Experience Pulse

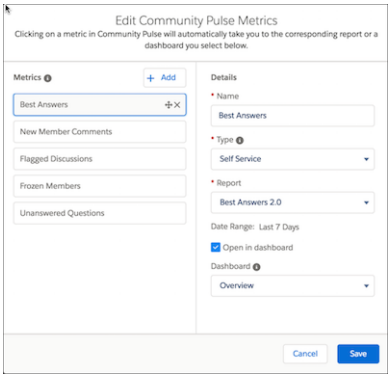
Experience Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create ones to meet your needs.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

To get started, map reports and dashboards to your Experience Workspaces. You can either map manually or install the Winter '18 or later version of the AppExchange package. After installation, Experience Pulse displays automatically. If you have an Experience Cloud site with Chatter, four tiles display after you install the package: Members, New Members, Unanswered Questions, and Flagged Discussions.

To customize a metric tile, click **Edit Metrics**. From here, create a metric or edit an existing one. You can have up to six metrics at a time.



By design, clicking a metric opens the corresponding report. However, selecting **Open in dashboard** lets you open a dashboard instead.

SEE ALSO:

Enable and Map Dashboards

Experience Cloud Site Moderation Limits and Limitations

Moderation limits ensure that your Experience Cloud site performs optimally.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Criteria Limits

- Your org can have up to 30 keyword list criteria. This limit is per org, not per Experience Cloud site.
- Your org can have up to 100 member criteria. This limit is per org, not per Experience Cloud site.

Rule Limits and Limitations

- Each content rule can have up to 3 keyword criteria and 10 member criteria. And each rate rule can have up to 10 member criteria.
- Moderation rules apply only to feed posts, comments, and polls. Moderation rules don't apply to topics that are created.

Audit Limitations

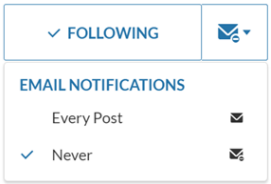
Changes to a feed item's status aren't included in the Insights report.

Organize Experience Cloud Sites with Topics

Navigational, featured, and content topics are a fantastic way to organize information and content in an Experience Cloud site and boost SEO for your articles. Use topics to structure your site's content or highlight key discussions. You can create topics or use the topics that organically emerge from site member posts.

Choose navigational topics and subtopics to provide a consistent map of your site. Use featured topics to highlight current, popular conversations. Use content topics to organize your original content. In the site itself, member-created topics let users organize information for one another, creating a personalized experience that boosts site engagement. Any article with an assigned navigational, featured, or content topic is included in search results.

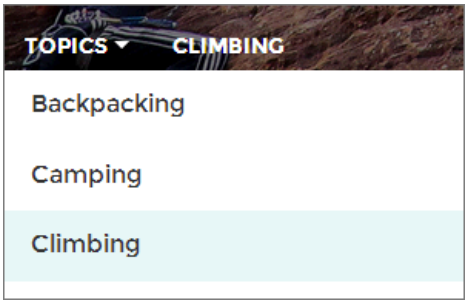
Site members can keep up to date on topics by following them and, optionally, receiving email notifications for topics they follow.



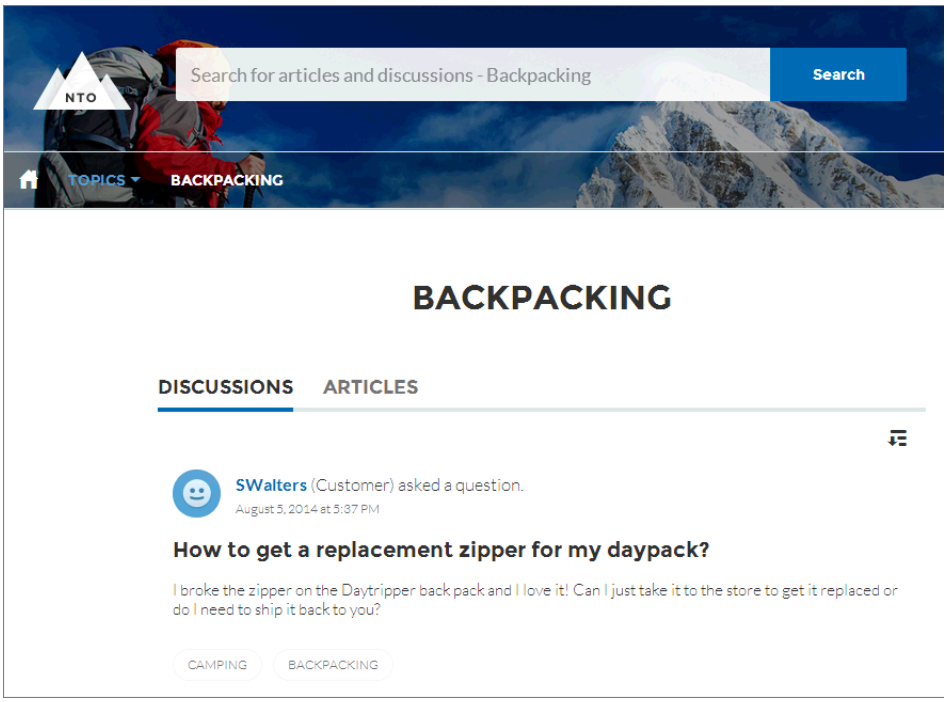
When members choose Every Post, they get notifications when a post or question is added to the topic. They don't get notifications when the hashtag topic is added to a comment, answer, or record feed.

Navigational Topics

On every page of a site, navigational topics are available from the Topics menu at the upper left. Site members can also see all the site's navigational topics and subtopics in one place in the topic catalog.



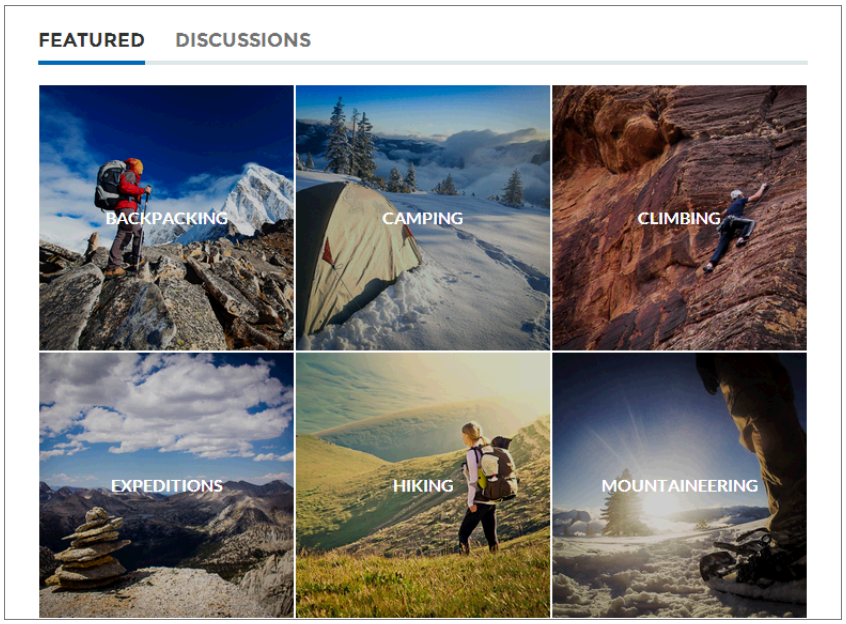
When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



Note: Properties on the Ask and Contact Support & Ask components let you block the selection of a new topic when a user asks a question. For more information, see Ask Button and Contact Support & Ask Buttons.

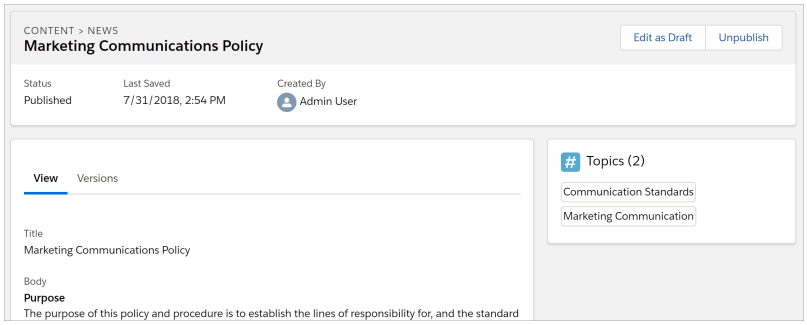
Featured Topics

Featured topics are accessible from the body of your site home page. Thumbnail images you select for featured topics uniquely identify them. (These unique thumbnails appear only on the home page; at the top of all featured topic pages, the default banner image specified in Experience Builder appears.)



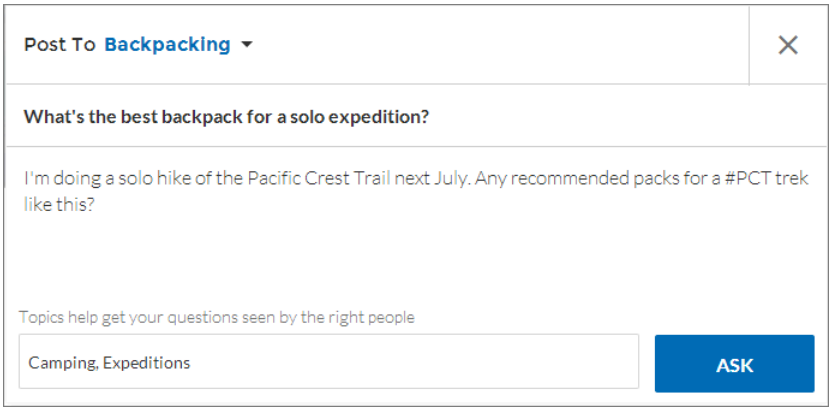
Content Topics

Content topics allow you to organize your original content around common themes. Enable topics that you're already using for content, or create topics and enable them for content. After topics are enabled for content, assign them to your native content.



Member-Created Topics

When posting questions, site members create topics by using hashtags in body text, or typing in the topic suggestions box. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for site users.)



If any suggested topics are poor matches for the post, members can simply click to delete them.

Tip: Member-created topics can be accessed via search or highlighted as featured topics.

Topic Metrics

Site members can check how often a topic has been used in the past 60 days and how many followers it has. Find metrics on a topic's detail page. With this information at their fingertips, site members know how current and popular a topic is. Admins can also use these metrics to highlight certain topics in their sites or consolidate similar topics based on usage.

Manage Topics in Experience Cloud Sites

As the number of topics in an Experience Cloud site grows, curate them to improve usability. You can create, merge, rename, enable for content, and delete topics in one convenient location.

Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your Experience Cloud site, and boost SEO for your Knowledge articles, by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. Articles added to the data category in the future are also tagged. All articles with assigned topics are included in search results.

Set Up Featured Topics

Featured topics highlight current, popular conversations in your Experience Cloud site. Change them regularly to keep members up-to-date and engaged.

Set Up Navigational Topics

Structure your Experience Cloud site's content and help your users find what they need with navigational topics. If your org uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. If data categories aren't enabled, administrators can add articles to each topic using Connect REST API.

Set Up Content Topics

Content topics organize your original content around common themes for your Experience Cloud site.

See Your Site's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your Experience Cloud site's content. Now you want your site members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your site's topic catalog.

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as your Experience Cloud site's needs change.

Translate Topics Names and Descriptions for Experience Cloud Sites with International Audiences

Use the Translation Workbench to translate topic names and descriptions in international Experience Cloud sites.

Manage Topics in Experience Cloud Sites

USER PERMISSIONS	
To access Experience Workspaces or Experience Management page:	Manage Experiences OR Create and Set Up Experiences
To create topics:	Create Topics
To merge topics:	Merge Topics AND Delete Topics AND Edit Topics AND Assign Topics
To delete topics:	Delete Topics
To edit topics:	Edit Topics

EDITIONS
Available in: Salesforce Classic (not available in all orgs) and Lightning Experience
Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

As the number of topics in an Experience Cloud site grows, curate them to improve usability. You can create, merge, rename, enable for content, and delete topics in one convenient location.

1. In Experience Workspaces, access topics by clicking **Content Management** > **Topics**.
2. Do one of the following.
   - To create a topic (often with a plan to merge existing ones into it), click **New**. To boost SEO, add a name and a topic description. If you want to be able to associate the topic with native content, select **Enable for content**.
   - To combine topics, click **Merge**.

     Merging a topic automatically redirects existing hashtags in posts. If you merge a navigational or featured topic, the topic type, image, and any subtopic relationships are discarded. If you merge a topic with a content topic, the content associations are preserved. If you merge a topic with an inactive endorsee, the endorsement is discarded.
   - To enable up to 10 topics for content at the same time, select the topics and click **Enable for Content**.

     After enabling topics for content, you can associate the topics with your native content.
   - To edit a topic, click and select **Edit**.

     If you deselect **Enable for content** when editing a topic that is associated with content, saving your changes removes the associations.
   - To see a topic detail page in your site, click the topic name.
   - To delete a topic, click and select **Delete**.

   If you don't see a topic you're looking for, you can search for it.

Tip: For sites with a global audience, you can translate names and descriptions of topics.

SEE ALSO:

Set Up Navigational Topics

Set Up Featured Topics

Set Up Content Topics

Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your Experience Cloud site, and boost SEO for your Knowledge articles, by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. Articles added to the data category in the future are also tagged. All articles with assigned topics are included in search results.

To use automatic topic assignments, enable Experience Workspaces in Digital Experience Settings.

1. Open Experience Workspaces.
2. Access automatic topic assignments by clicking **Content Management** > **Topics** > **Automatic Topic Assignment**.
3. Enable **Automate Topic Assignment**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces:

- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

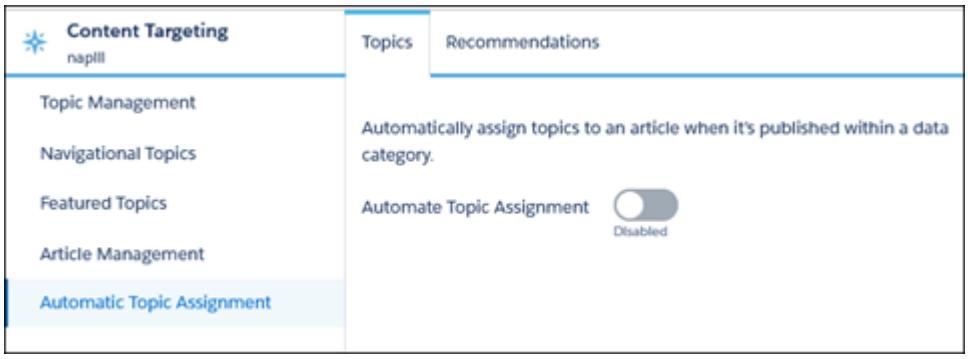
  Is a member of the site

To set up automatic topic assignments:

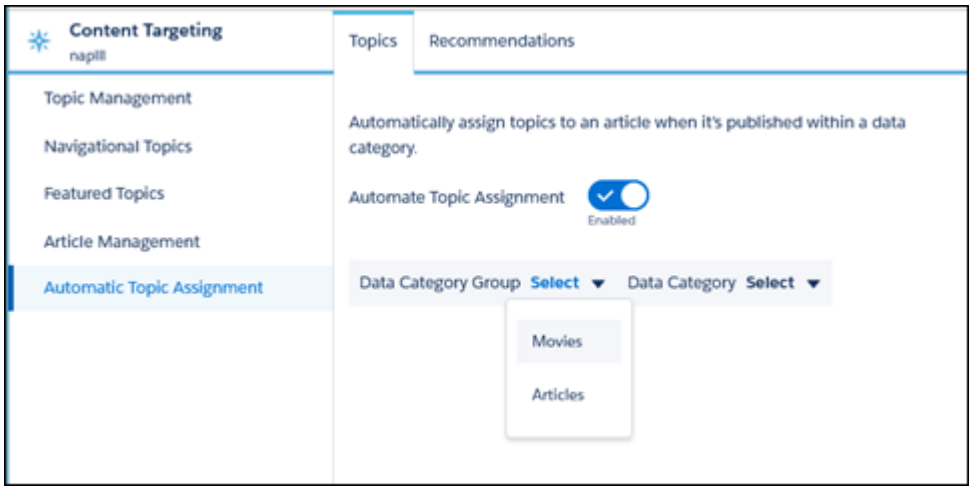
- Edit Topics

  AND

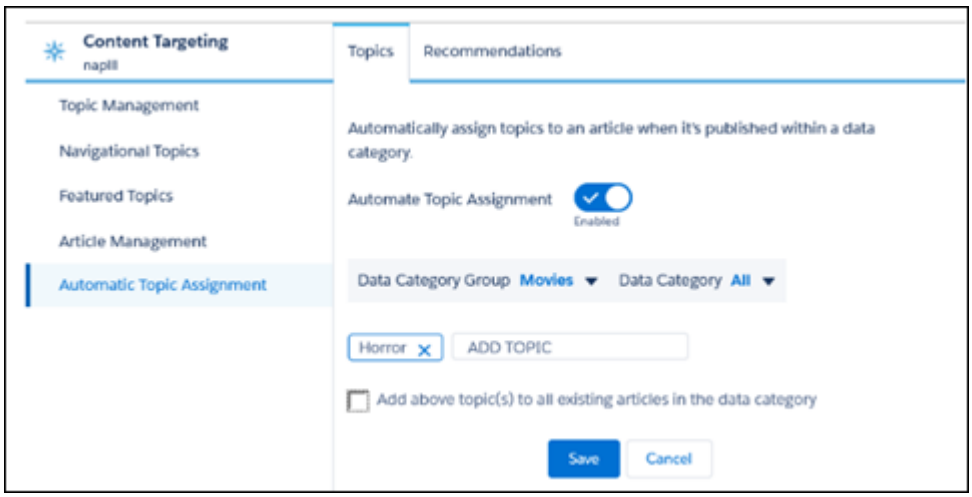
  View Data Categories



4. Select a data category group and a data category.



5. Add the topics that you want to assign to the articles under that data category.



6. Select the option to add the topics to existing articles in the data category. The topics are then assigned to all articles in all data categories under the data category group. If you don't select this option, the topics are added only to new articles added to the data category, and the existing articles remain unchanged.
7. Click **Save**.

Consider the following as you set up your topic assignment rules.

- Topic assignments are site-specific. If you use the same article in two different sites, set up automatic assignments in both sites.
- If a translation of a topic is available in Salesforce, the translated article is tagged with the corresponding translated topic. If there's no translated topic in the system, localized articles are tagged with the base language topic.
- You can't automatically remove topics from articles. Instead, you must manually remove topics.
- If you merge two topics, you must set up new rules.
- If you automatically add a topic to a data category, the topic is added to all articles in the data categories above it in the hierarchy. Topics aren't automatically added down a hierarchy to child data categories.

Set Up Featured Topics

Featured topics highlight current, popular conversations in your Experience Cloud site. Change them regularly to keep members up-to-date and engaged.

1. In Experience Workspaces, access featured topics by clicking **Content Management** > **Topics** > **Featured Topics**.
2. Enter the first few letters of the topic name in the search box. Select a suggested topic and click **Add**. Use navigational or member-created topics.

   Tip: Using Connect REST API, you can create unique featured topics that are separate from navigational or member-created ones.

3. Hover over a topic name, and click . Then click **Upload thumbnail image**, and select an image that represents the featured topic on the site home page.

   Thumbnail images are scaled to 385 x 385 pixels. To prevent distortion, create image files with those dimensions.

   To ensure guest users can see featured topic images in your site, select Let guest users view asset files and CMS content available to the site in **Administration** > **Preferences** in Experience Workspaces. This selection also allows guest users to see images associated with recognition badges, site branding, and account branding.

4. Repeat steps 3 and 4 to create several featured topics for your site, up to a maximum of 25. Then click **Save**.

To edit featured topics, hover over a topic name.

- To move topics up or down, click the arrows at left.
- To delete topics or change their thumbnail images, click .

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management page:

- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

  Is a member of the site

To set up featured topics:

- Edit Topics

To create, edit, and delete images for featured topics:

- Create, Edit, and Delete on the image record

Set Up Navigational Topics

Structure your Experience Cloud site's content and help your users find what they need with navigational topics. If your org uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. If data categories aren't enabled, administrators can add articles to each topic using Connect REST API.

1. From Setup, enter `Topics for Objects` in the Quick Find box, then select **Topics for Objects**.
   a. In Classic Knowledge, enable topics for all the article types you want to include.
   b. In Lightning Knowledge, enable topics for Knowledge.

   Note: Enabling topics disables public tags on articles. Personal tags aren't affected.
2. Open Experience Workspaces.
3. In Experience Workspaces, access navigational topics by clicking **Content Management** > **Topics** > **Navigational Topics**.
4. In the text box at right, enter a topic name, and click **Add**. Want to add subtopics? After you add a topic, choose your topic from the dropdown menu (under Show subtopics of). To add a subtopic, add another topic and click **Add**. You can add up to two levels of subtopics for each parent topic.
5. If your org uses data categories, hover over the navigational topic name, and click . Select a Data Category Group, then select the categories you want to add to the topic, and click **Add Articles & Close Window**.

   Important: This process adds only current articles to a topic. To add new articles, return to Experience Workspaces and repeat the previous step.
6. Hover over a topic name, and click . Then click **Upload banner image** and select an image that appears across the top of the topic page.

   Banner images are scaled to 1400 x 180 pixels. To prevent distortion, create image files with those dimensions.

   To ensure guest users can see navigational topic images in your site, select Let guest users view asset files and CMS content available to the site in **Administration** > **Preferences** in Experience Workspaces. This selection also allows guest users to see images associated with recognition badges, site branding, and account branding.
7. Repeat steps 4–6 to create several navigational topics for your site. Then click **Save**.
8. Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization. This table shows the maximum number of navigational topics and subtopics you can create in the UI of a Customer Service site.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management page:
- Manage Experiences

  AND

  Create and Set Up Experiences

  AND

  Is a member of the site

To set up navigational topics:
- Create Topics

  AND

  Edit Topics

To add articles to topics:
- View Data Categories

  AND

  Read on related article types

With Connect REST API or Connect in Apex, you can create an additional five levels, each with 10 subtopics, for a total of 2,775 navigational topics.

Tip: To edit navigational topics, hover over a topic name.

- To move a topic up or down, click the arrows at left.
- To rename or remove a topic, change its banner image, or remove assigned articles, click .

SEE ALSO:

See Your Site's Topics and Subtopics in One Place

Set Up Content Topics

Content topics organize your original content around common themes for your Experience Cloud site.

1. Open Experience Workspaces.

   You can view and edit content topics in Experience Management, but you can't create content topics or enable topics for content in Experience Management.

2. Access topics by clicking **Content Management** > **Topics**.
3. Select **All Topics** > **All Content Topics**.
4. To create a content topic, click **New**.
5. Enter a name and description. Select **Enable for content**.
6. Repeat steps 4 and 5 to create several content topics for your Experience Cloud site, up to a maximum of 5,000.

   Alternatively, use the All Topics list and select up to 10 topics at a time and click **Enable for Content**.

After a topic is enabled for content, you can associate the topic with your native content.

To edit or delete a content topic, click in the topic row and select **Edit** or **Delete**.

EDITIONS

Available in: Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces page:

- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

  Is a member of the site

To set up content topics:

- Create Topics

  AND

  Edit Topics

See Your Site's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your Experience Cloud site's content. Now you want your site members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your site's topic catalog.

The topic catalog shows the hierarchy of navigational topics you've created for the Experience Cloud site. It's only visible after you set up navigational topics, and it's accessed from the navigation menu.

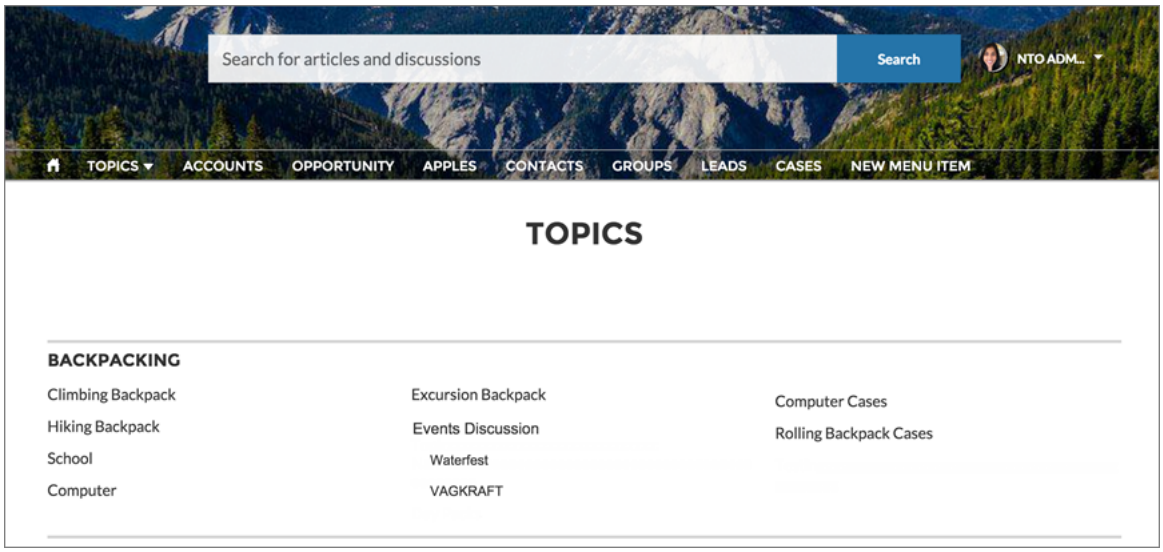
How is the topic catalog useful to your site members?

- New and returning users look at all the organized topics in one place, getting a lay of the land before diving deeper into a specific topic.
- Any site user can use the topic catalog as a jumping point to go from topic to topic.

To set up the topic catalog, select **Add the "More Topics..." link** when editing the navigation menu on the home page. The link appears when you have at least one subtopic.

You can also see an article or discussion's placement in the topic hierarchy using breadcrumbs. To show breadcrumbs on your site's pages, drag the Breadcrumb component to the page in Experience Builder.

Example:



SEE ALSO:

Set Up Navigational Topics

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as your Experience Cloud site's needs change.

1. In Experience Workspaces, access topics by clicking **Content Management** > **Topics** > **Article Management**.
2. Use the search bar to look for articles. Filter your search by selecting a data category group, followed by a specific category.
3. Click an article, and then type to assign topics. Choose a suggested topic or type a new one. Type a comma (,) after your new topic to add it to the article. You can click existing topics to remove them.

Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management page:

- Manage Experiences

  OR

  Create and Set Up Experiences

To add or remove topics:

- Create Topics

Translate Topics Names and Descriptions for Experience Cloud Sites with International Audiences

Use the Translation Workbench to translate topic names and descriptions in international Experience Cloud sites.

1. From Setup, enter `Translate` in the `Quick Find` box, then select **Translate**.
2. Select the language you're translating into.
3. Select **Managed Topic** for the Setup Component.
4. For Aspect, select **Field Label** for the topic name, and **Description** for the topic description.
5. In the Experience Name column, expand a site to see its primary topic names.
6. To enter language-specific names for topics, double-click in the Topic Name Translation column. For descriptions, double-click in the Topic Description Translation column.

   Consider the following when you're using the Translation Workbench:

   - There's no Metadata API support for translated topic names or descriptions.
   - While topic name uniqueness is guaranteed in English, the translator must ensure the uniqueness of topic names in the translated language.
   - Modifying topic names from Experience Workspaces or Experience Management only changes the English site. All translated topic name and description changes must be made using the Translation Workbench.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To translate topics:

- View Setup and Configuration

  AND

  Be designated as a translator

- If a translated topic name is entered when the site is in English mode, the translated name can appear twice in the translated site.
- When topics names are translated with the Translation Workbench, hashtags in the translated sites also change. For example, #help shows as #aiuto in Italian. If the site member then reverts to English from Italian, clicking the #aiuto hashtag gives an error message rather than showing the topic detail page of #help.
- When viewing the topic detail page of a translated topic, the browser tab doesn't show the translated topic name.

Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

Customize Recommendations in Experience Cloud Sites

Create recommendations to drive engagement for your Experience Cloud site, encouraging users to watch videos, take trainings, and more. Target specific audiences and use channels to specify locations for the recommendations.

Note: Recommendation audiences and personalization audiences are different features. For a more updated content targeting experience, we suggest using CMS collections and personalization audiences.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management:

- Manage Experiences

  OR

  Create and Set Up Experiences

1. In Experience Workspaces, select **Content Management** > **Recommendations**.
2. Select **Default Channel** or one of the custom channels.

   A channel is a way to group recommendations together so you can determine where they show up in the site.

   Default Channel
   Recommendations in the default channel appear in predefined locations, such as the Home and Question Detail pages in Customer Service and Partner Central templates.

   Custom Channel
   You choose the pages where you want these recommendations to appear. In Experience Builder, add the Recommendations Carousel component to the page where you want the recommendation to appear. Use the property editor to specify the custom channel with the recommendation.

   Using a custom channel, you could surface a recommendation to review specific knowledge articles on a product description page to guide customers to more information.

   If you want to change the channel of a recommendation, delete the recommendation and recreate it in a different channel.
3. Click **New**.
4. Complete the following fields:
   - `Name`—Enter a name for the recommendation. This name doesn't appear in the site.
   - `Image`—Click **Upload Image** to include an image with your recommendation.
   - `Title`—Optionally, enter header text that appears above the image.
   - `Description`—Enter detailed text that suggests what users can do.
   - `Button text`—Enter a label for the button in the recommendation.
   - `https://`—Enter the URL that the button opens.

     The URL can contain context variables to pass information about the user who clicked the recommendation and the context in which it was clicked. For example, include a `{!userId}` context variable in your URL,

`https://www.example.com/doSurvey?userId={!userId}`. When a user clicks the button in the recommendation, Salesforce sends the ID of that user to your server in the HTTP request.

Recommendations support these context variables.

Context Variable	Description
`{!actionLinkId}`	The ID of the recommendation link that the user clicked.
`{!actionLinkGroupId}`	The ID of the recommendation link group containing the recommendation that the user clicked.
`{!communityId}`	The ID of the site in which the user clicked the recommendation. The value for your internal Salesforce org is the empty key, `"000000000000000000"`.
`{!orgId}`	The ID of the org in which the user clicked the recommendation.
`{!userId}`	The ID of the user that clicked the recommendation.

- `Audience`—Select an audience for the recommendation. If you don't select an audience, all members of the site see the recommendation.

  Tip: To create an audience that appears in this dropdown list, in Experience Workspaces, select **Content Management** > **Recommendations** > **Audiences**. Click **New**.

- `Enabled`—If checked, this recommendation is active and appears in sites.

  The Recommendations Carousel displays your custom recommendations and also displays system-generated topic recommendations for your site.

  After a site member clicks or dismisses a recommendation, it no longer appears for that member.

5. Click **Save**.
   So that users don't see the same recommendations all the time, Salesforce periodically removes and brings back custom recommendations that haven't been accepted or dismissed.

Tip: To remove a recommendation, click the recommendation name. At the bottom of the recommendation details, click **Delete**.

Create Audiences for Your Recommendations

Create audiences of new members or use the API to manage customized lists of audience members for your custom recommendations.

SEE ALSO:

Update Your Experience Builder Site's Template

Create Audiences for Your Recommendations

Create audiences of new members or use the API to manage customized lists of audience members for your custom recommendations.

Note: Recommendation audiences and personalization audiences are different features. For a more updated content targeting experience, we suggest using CMS collections and personalization audiences.

1. In Experience Workspaces, select **Content Management** > **Recommendations** > **Audiences**.
2. Click **New**.
3. Complete the following fields.
   - `Name`—Enter a name for the audience.
   - `Audience Type`
     - Select **New Members** to create an audience based on how long users have been site members.

       Enter the number of days since registration for audience members.
     - Select **Custom List** to create an audience based on any criteria you want.

       Note: You can't manage audience membership for custom lists through the UI. Add and remove members through the API.
4. Click **Save**.

Audiences you create appear in the Audience drop-down list when you create a recommendation.

Tip: To remove an audience, click the audience name. At the bottom of the audience details, click **Delete**. If you remove an audience that is associated with a recommendation, the recommendation is disabled and the audience is set to the default (All site members).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Experience Workspaces or Experience Management:

- Manage Experiences

  OR

  Create and Set Up Experiences

SEE ALSO:

Connect REST API Developer Guide: Custom Recommendation Audience Resources

Apex Reference Guide: Recommendations Class

Gamification

Use gamification tools, like Recognition Badges and Reputation, to keep your members engaged in your site.

Recognition Badges

Acknowledge your members' accomplishments or celebrate with them using Recognition Badges.

Reputation Overview

Your reputation in the Experience Cloud site directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Recognition Badges

Acknowledge your members' accomplishments or celebrate with them using Recognition Badges.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note: Badges can only be assigned to users and by users who have Chatter enabled.

We provided some default badges but you can create your own. You can also choose who else can create badges and who can give badges in your site.

Recognition Badges Limitations

While Recognition Badges are a great way to keep your members involved in your site, keep a few things in mind when you use them.

Recognition Badges Setup

With just a few steps, you can set up Recognition Badges for your site and restrict who can create and give badges.

Missions

Game mechanics, such as using badges, are a great way to get your users involved in your Experience Cloud site. However, assigning badges manually can be time consuming. Instead, use the Missions feature to assign members badges automatically. Community managers have their say in what action earns a badge and when it can be awarded, and then Missions takes care of the rest. And members can see which badges they haven't yet earned, inspiring action.

Assign Recognition Badges to Experience Cloud Site Members

Assigning badges to members helps reward them for staying engaged in the Experience Cloud site.

Delete Assigned Badges

Sometimes badges are assigned to a member by mistake. If you gave the badge, you can delete it from the member's profile page.

Use the API to Give Recognition Badges Sample Code

You can use the API to programmatically give recognition badges to Experience Cloud site members.

SEE ALSO:

Experience Cloud Recognition Badges Implementation Guide

Recognition Badges Limitations

While Recognition Badges are a great way to keep your members involved in your site, keep a few things in mind when you use them.

- Chatter must be enabled for your site.
- It's currently not possible for users with a Customer Community or Customer Community Login license to assign a private badge. Only internal users or users with the following licenses, and with the **Assign Recognition Badges in Experience Builder Sites** permission, can assign a private badge:
  - Customer Community Plus
  - Customer Community Plus Login
  - Partner Community

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

  - Partner Community Login
- Users with the following licenses can see the badges that they've received, but **not** assign badges:
  - Customer Portal User
  - High Volume Customer Portal
  - Internal Portal User
  - Standard Partner
- Badges aren't translated. The badge name and description are the same regardless of which language the member is using.
- "Review" moderation rules aren't enforced for badges comments. To help prevent unwanted keywords from appearing in your site, add your list of words to "block" or "replace" rules.
- Past activity, such as comments or likes, isn't counted when you create a mission.

Recognition Badges Setup

With just a few steps, you can set up Recognition Badges for your site and restrict who can create and give badges.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Enable WDC Thanks

Recognition Badges are based on the WDC Thanks feature. Enable this feature plus the ability to restrict who can create badges before continuing in your setup.

Turn On Recognition Badges in Experience Workspaces

Turn on Recognition Badges via the Gamification Tile to finish setting up and start giving badges.

Configure Who Can Create Recognition Badges

Use permission sets, our recommended method, to choose which members can create recognition badges. Restricting who can do so helps control the number of badges in your site and maintains the value of a badge.

Configure Who Can Assign Recognition Badges

Use permission sets, our recommended method, to choose which members can assign recognition badges. Restricting who can do so helps control the number of badges in your site and maintains the value of a badge.

Use Components to Display Assigned Recognition Badges on Member Profiles

Use the User Profile component or the Recognition Badge component to display assigned Recognition Badges on a member's profile.

Create, Edit, and Delete Recognition Badges

In addition to the four default badges, you can create your own to fit the needs of your site. You can edit both the default badges and your custom badges.

Manage Who Can Assign a Specific Recognition Badge

Controlling who can assign a recognition badge helps make sure the right badges are awarded to the right members. For example, you can set it up so that only community managers can assign MVP and VIP badges.

Display the Full List of Assigned Recognition Badges on a Member's Profile Page

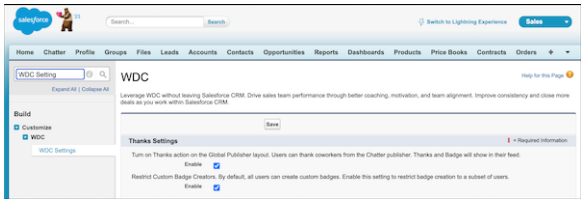
Edit the user profile layout to display the full list of assigned recognition badges on a members' profile page.

Enable WDC Thanks

Recognition Badges are based on the WDC Thanks feature. Enable this feature plus the ability to restrict who can create badges before continuing in your setup.

Note: You don't need an extra WDC license to set up the Thanks feature.

1. In Classic, from Setup, enter `WDC Settings` in the **Quick Find** box.
2. Select **WDC Settings.**
3. Under **Thanks Setting**, select **Enable** and save. The Restrict Custom Badge Creators option is now available.
4. Under Restrict Custom Badge Creators, select **Enable**, and save.



EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

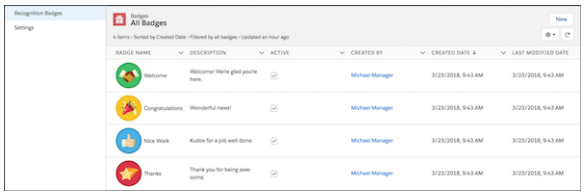
To set up the Thanks feature:
- Customize Application

Turn On Recognition Badges in Experience Workspaces

Turn on Recognition Badges via the Gamification Tile to finish setting up and start giving badges.

Before completing this task, enable WDC's Thanks feature, configure permission sets for who can create and give badges, and add recognition to user profile layouts.

1. In Experience Workspaces, click the Gamification tile.
2. In **Settings**, turn on Recognition Badges. A Recognition Badges section appears above **Settings**.
3. To see the available badges and create and manage badges, click **Recognition Badges**.



EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To turn on or off Recognition Badges:
- Create and Set Up Experiences

  AND

  Moderate Chatter

Configure Who Can Create Recognition Badges

Use permission sets, our recommended method, to choose which members can create recognition badges. Restricting who can do so helps control the number of badges in your site and maintains the value of a badge.

Say that you create a recognition badge to be given to MVPs. Restricting who can create badges helps eliminate the risk of having multiple MVP badges. Restricting who can give the badge to, say, community managers helps make sure only those members who are truly MVPs receive recognition for it.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create permission sets:
- "Manage Profiles and Permission Sets"

To assign permission sets:
- "Assign Permission Sets"

1. First, set up the permission set for creating badges. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information. Name the permission set "Create Custom Badge Definitions."
4. Click **System Permissions** and then click **Edit**.
5. To add the permissions for creating a badge, select **Create custom Badge Definitions** permission.
6. Select **Manage Assignments** and add those users you want to let create badges.

Configure Who Can Assign Recognition Badges

Use permission sets, our recommended method, to choose which members can assign recognition badges. Restricting who can do so helps control the number of badges in your site and maintains the value of a badge.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create permission sets:
- "Manage Profiles and Permission Sets"

To assign permission sets:
- "Assign Permission Sets"

Note: It's currently not possible for users with a Customer Community or Customer Community Login license to assign a private badge. Only internal users or users with the following licenses, and with the **Assign Recognition Badges in Experience Builder Sites** permission, can assign a private badge:

- Customer Community Plus
- Customer Community Plus Login
- Partner Community
- Partner Community Login

Note: Buttons for assigning badges appear in two places on the member's profile. If after following the steps below, your approved users don't see the Give button at the top of a member's profile, under Settings, go to Users. Edit the User Page Layout and add the Give Badge action in the Salesforce Mobile and Lightning Experience Actions section.

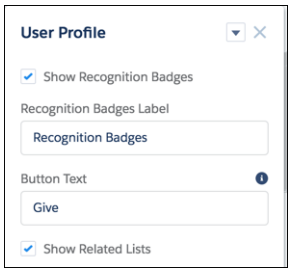
1. First, set up the permission set for creating badges. From Setup, enter `Permission Sets` in the Quick Find box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information. Name the permission set "Assign Recognition Badges in Experience Builder Sites."
4. Click **System Permissions** and then click **Edit**.
5. To add the permissions for assigning a badge, select **Assign Recognition Badges in Experience Builder Sites** permission.
6. Select **Manage Assignments** and add those users you want to let assign badges.

Use Components to Display Assigned Recognition Badges on Member Profiles

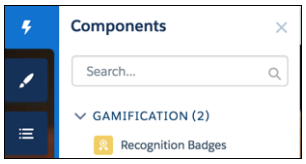
Use the User Profile component or the Recognition Badge component to display assigned Recognition Badges on a member's profile.

You can either use the User Profile component or the Recognition Badges component to allow assigned badges to display on a member's profile page.

1. In the User Profile component, select **Show Recognition Badges**.



2. Alternatively, drag the Recognition Badges component onto the profile page.



EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To manage page components:

- Create And Set Up Experiences

Create, Edit, and Delete Recognition Badges

In addition to the four default badges, you can create your own to fit the needs of your site. You can edit both the default badges and your custom badges.

1. To create a badge, in Experience Workspaces, click the Gamification tile and go to the Recognition Badges section.
2. Click **New**.
3. Give your badge a name and a description and upload an image. Click **Save**. The **Public** and **Active** checkboxes are selected by default. When you save, your badge is immediately available to everyone with permissions to give a badge. If you want to limit who can give a badge, deselect **Public**. If you aren't ready for it to be live, deselect **Active**. If you want the badge to be available for a mission, select **Mission Badge**.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:

- Create Custom Badge Definitions

To manage your recognition badges:

- Create And Set Up Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

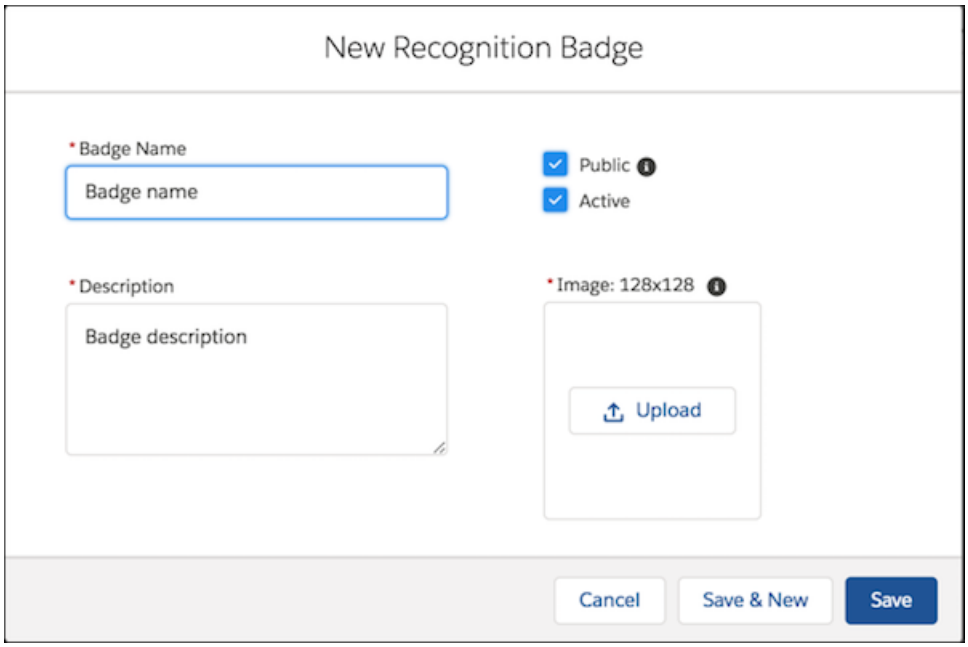
  Moderate Chatter

To manage badges owned by someone else:

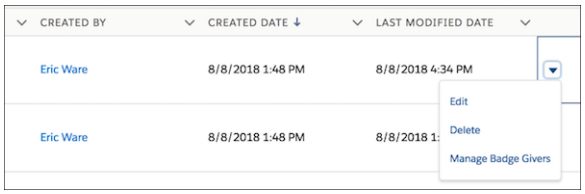
- Modify All Data

  AND

  Moderate Chatter



4. To edit the fields, go to the badge related list, click the dropdown at the end of the badge's row, and click **Edit**.



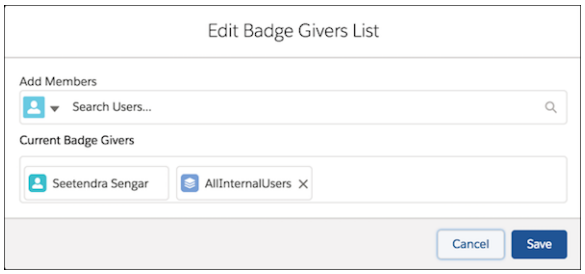
5. To delete a badge, go to the badge related list, click the dropdown at the end of the badge's row, and click **Delete**.

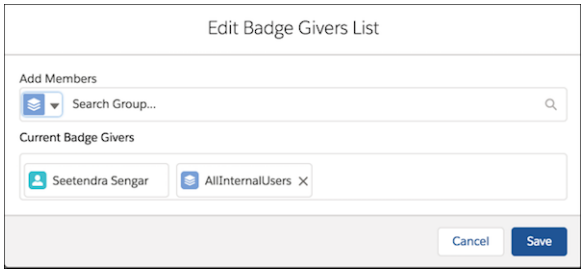
Manage Who Can Assign a Specific Recognition Badge

Controlling who can assign a recognition badge helps make sure the right badges are awarded to the right members. For example, you can set it up so that only community managers can assign MVP and VIP badges.

By default, recognition badges are available to everyone with permission to assign badges. To be able to select specific givers, make sure to deselect **Public** when you create or edit the badge.

1. In Experience Workspaces, click the Gamification tile.
2. Click the dropdown and the end of the badge's row, and click **Manage Badge Givers**.
3. In the window, search to add the users or public groups you want to have permission to assign badges.





Note: Only those users with the Assign Recognition Badges in Experience Builder Sites permission are available. You can remove members from the list by clicking the X by their name.

4. Click **Save**.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:

- Create Custom Badge Definitions

To manage your recognition badges:

- Create And Set Up Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

  Moderate Chatter

To manage badges created by someone else:

- Modify All Data

  AND

  Moderate Chatter

Display the Full List of Assigned Recognition Badges on a Member's Profile Page

Edit the user profile layout to display the full list of assigned recognition badges on a members' profile page.

EDITIONS

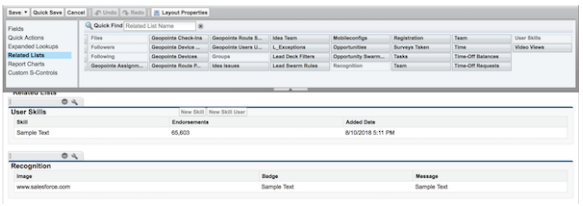
Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To update the user profile layout:

- Customize Application

1. From Setup, go to **Users** under **Customize**. Select **Page Layouts**.
2. Click **Edit** next to User Profile Layout.
3. Click **Related Lists** and drag **Recognition** to the Related Lists section of the page layout.



4. Click **Save**.
5. Each site's guest users have a discrete user profile. To find out which user profile layout to update, go to Experience Builder in the site you're working on.
6. Click **Settings** and select the link to the guest user profile.
7. Repeat steps 1–4 for that user profile layout.

Missions

Game mechanics, such as using badges, are a great way to get your users involved in your Experience Cloud site. However, assigning badges manually can be time consuming. Instead, use the Missions feature to assign members badges automatically. Community managers have their say in what action earns a badge and when it can be awarded, and then Missions takes care of the rest. And members can see which badges they haven't yet earned, inspiring action.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Community managers create missions and choose the badge, the action, and the threshold. For example, a mission could assign the Nice Work badge when a member answers 10 questions. Actions you can choose from include writing a post or comment, receiving a like, and more. Members can earn each mission badge once.

Note: Badges can only be assigned to users and by users who have Chatter enabled.

Create a Mission

Create a mission, choosing an action, threshold, and badge, to automatically give badges to your members.

Display Unearned Mission Badges

Inspire members to participate more in your Experience Cloud site by showing them the badges they can earn. You can display the unearned badges in the member's recognition badges list.

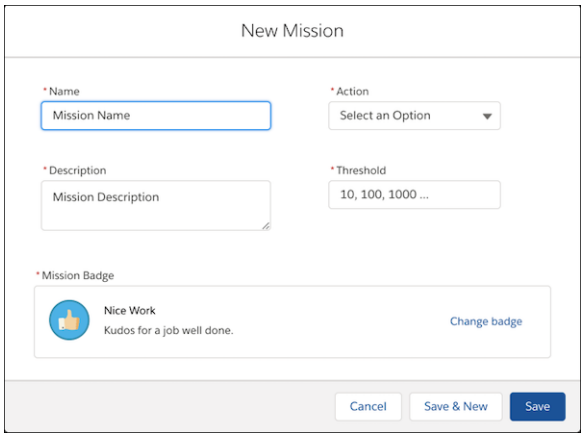
Create a Mission

Create a mission, choosing an action, threshold, and badge, to automatically give badges to your members.

Note:

- To use Missions, set up Recognition Badges.
- Members only receive a mission badge once. If a member received the badge before a mission was set up, they won't receive it again.
- Missions count activities that occurred before the missions were set up. When you set up missions for the first time, click **Reset Activity Count** to restart the count for all activities. Be careful about resetting the counts after you have missions established, though, as the reset will erase all of your members' progress toward earning badges.

1. In Experience Workspaces, click the Gamification tile and go to the Missions section.
2. Click **New**.
3. Give the mission a name and a description.



4. Select the action that the member performs.
5. Enter the threshold, which sets the total number of actions a member must repeat to earn the badge. The threshold doesn't repeat and badges are earned once. For example, if you set the threshold to 10, the member will receive the badge after completing the 10th action, but not the 20th.
6. Choose your preferred badge and save your changes.

   Tip: To make a badge available for missions, in the Recognition Badges section, create or edit a badge and select **Mission Badge**.

   As a best practice, use the badge's name and description to explain how the user can earn it.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:

- Create Custom Badge Definitions

To manage your recognition badges:

- Create And Set Up Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

  Moderate Chatter

To manage badges created by someone else:

- Modify All Data

  AND

  Moderate Chatter

Display Unearned Mission Badges

Inspire members to participate more in your Experience Cloud site by showing them the badges they can earn. You can display the unearned badges in the member's recognition badges list.

User Permissions Needed	
To edit page components:	Create and Set Up Experiences AND View Setup and Configuration

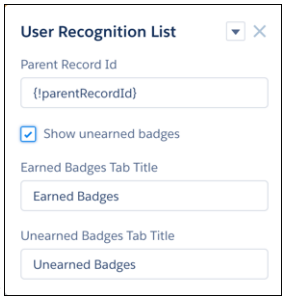
EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

Note:

- To use Missions, set up Recognition Badges.
- Missions count activities that occurred before the missions were set up. You can reset the count when you create your mission, but be aware that this resets all the activity counters.

1. In Experience Builder, open the Badge Received Related List page.
2. Click the User Recognition List component.
3. Select **Show unearned badges**.



Assign Recognition Badges to Experience Cloud Site Members

Assigning badges to members helps reward them for staying engaged in the Experience Cloud site.

1. Open the member's profile page.
2. Click either the **Give Badge** button at the top of the profile or the **Give** button on the Recognition Badges card.
3. Choose which badge you want to assign by clicking **Change badge**.
4. Add a message letting the member know why they're getting the badge, and click **Give**.

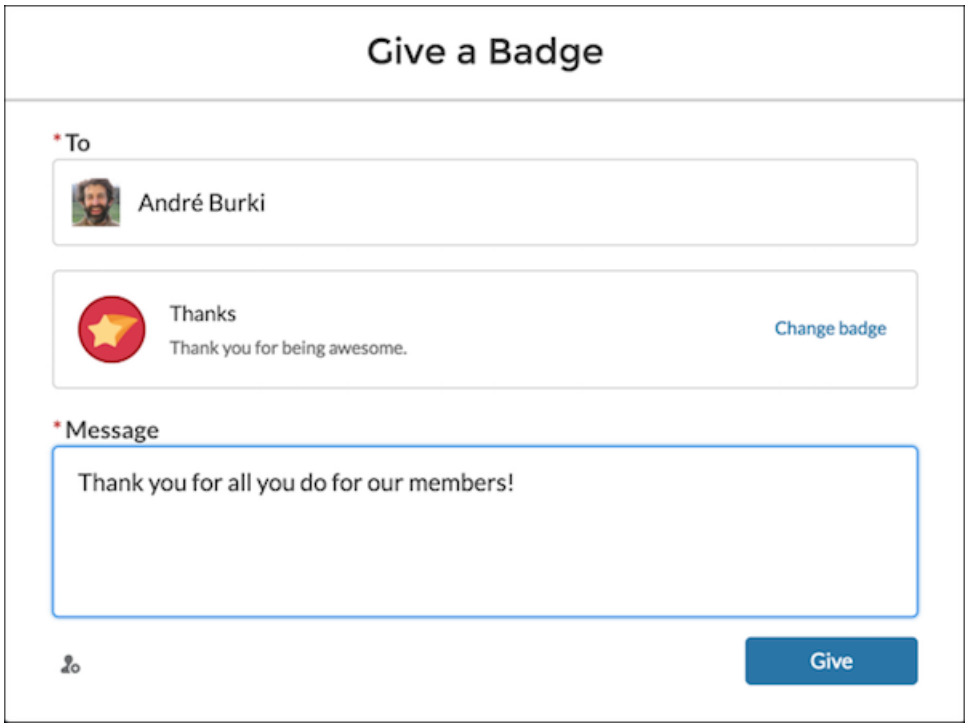
EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To assign recognition badges:

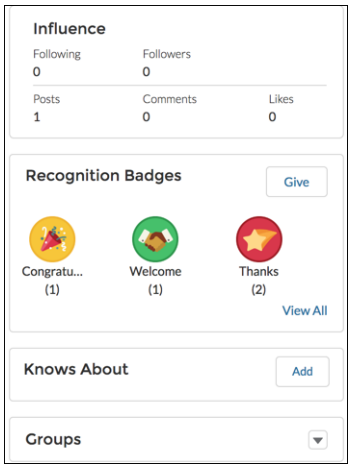
- Assign Recognition Badges in Experience Builder Sites



Delete Assigned Badges

Sometimes badges are assigned to a member by mistake. If you gave the badge, you can delete it from the member's profile page.

1. Open the profile page for the member who got the badge by mistake.
2. To open the Recognition Badge list view, click **View All** under Recognition.



3. Locate the badge in the list and click the dropdown at the end of the row.
4. Click **Delete**.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To manage your recognition badges:

- Create And Set Up Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

  Moderate Chatter

Use the API to Give Recognition Badges Sample Code

You can use the API to programmatically give recognition badges to Experience Cloud site members.

Assign a Recognition Badge and Notify a Member Using Apex

```
ID networkID = '0DBB0000000CdBaOAK';
ID badgeDefintionID = '0W1B0000000ekuJKAQ';
ID giverID = '005B0000003InDeIAK';
ID recipientID = '005B000000483dDIAQ';
String message = 'Welcome to the site';

WorkThanks thanks = new WorkThanks (
NetworkdID=networkID
GiverID=giverID,
Message=message
);
insert thanks;

WorkBadge badge = new WorkBadge(
DefinitionId=badgeDefinitionId,
NetworkID=networkID
RecipientId=recipientID,
SourceId=thanks.id
);
insert badge;

// optional: create a Chatter post on the user profile
// showing the badge. The user will be notified through
// the standard Chatter notification mechanisms.
FeedItem feedItem = new FeedItem(
NetworkScope=networkID,
ParentId=recipientID,
RelatedRecordId=thanks.id,
Body=message,
Type='RypplePost',
Visibility='AllUsers'
);
insert feedItem;

// Unfortunately, there is a limitation in the WDC API that
// prevents these 2 lines from working:
// thanks.FeedItemID = :feedItem.id;
// update thanks;
```

Assign a Recognition Badge When a Member Reaches a Number of Reputation Points

To avoid assigning the same badge twice, we've added a custom "hasBadge_c" field on the user object.

```
trigger NetworkMemberTrigger on NetworkMember (after update) {
              for (NetworkMember nm : Trigger.New) {
                   User user = [select ID, hasBadge_c from User where ID =
:nm. MemberID];
         If (nm.ReputationPonts >= 40 && !user.hasBadge_c) {
             WorkThanks thanks = new WorkThanks(
             GiverId='005B00000036ukY',
             Message='inserted by trigger',
             NetworkId=nm.NetworkId);
             insert thanks;

            WorkBadge badge = new WorkBadge(
            DefinitionId='0W1B0000000T1QBKA0',
            NetworkId=nm.NetworkId,
            RecipientId=nm.MemberId,
            SourceId=thanks.id);
            insert badge;

            user.hasBadge_c = true;
            update user;
      }
   }
}
```

Automatically Add Reputation Points When Badge Is Assigned to a Member

To avoid hardcoding the number of reputation points that are assigned with the badge, this example assumes that the WorkBadgeDefinition entity has been customized with an additional "ReputationPoints__c" field.

```
trigger WorkBadgeTrigger on WorkBadge (after insert) {
             for (WorkBadge badge : Trigger.new) {
                 if (badge.DefinitionId == '0W1B0000000T1QBKA0') {
                     WorkBadgeDefinition badgeDefinition = [select Id,
ReputationPoints_c from WorkBadgeDefinition where Id =
:badge.DefinitionId];
            NetworkMember member = [select Id, ReputationPoints from
NetworkMember where MemberID = :badge.RecipientId];
            member.ReputationPoints = member.ReputationPoints +
badgeDefinition.ReputationPoints_c;
            update member;
      }
   }
}
```

Assign Recognition Badge When Member Creates Number of Posts or Comments

The ChatterActivity object contains the following useful fields:

- CommentCount
- CommentRecievedCount

- LikeReceivedCount
- PostCount

These counters can be used to programmatically assign badges based on various thresholds. For example, members could get a badge whenever they create 100 posts or whenever they received 100 likes.

```
trigger ChatterActivityTrigger on ChatterActivity (after update) {
              for (ChatterActivity ca : Trigger.New) {
                  if (ca.PostCount >= 10) {
                      // TODO: assign badge to user if he hasn't received one already
      }
   }
}
```

Reputation Overview

Your reputation in the Experience Cloud site directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

Your reputation level appears on your profile page and when any user hovers over your name. It's visible to other members so that they know how influential you are. When you start out, you are at the lowest level. As you become more active, you gain points and your reputation level increases. Increases in reputation levels are posted to your feed. In other words, as people see you participating and sharing your knowledge, your credibility and influence grows.

These are the default actions that increase your reputation level.

- Posting
- Commenting
- Liking a post or comment
- Sharing a post
- People sharing your posts
- People commenting on your posts
- People liking your posts or comments
- Mentioning someone
- Being mentioned
- Asking a question
- Answering a question
- Receiving an answer
- Marking an answer as best
- People marking your answer as best
- Endorsing someone for knowledge on a topic
- Being endorsed for knowledge on a topic

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Enable Reputation in Your Experience Cloud Site

Enable reputation so that site members are recognized and rewarded for participating.

Set Up Reputation Levels

Update the default reputation levels to meet your Experience Cloud site's needs and help motivate your members.

Set Up Reputation Points

Set up a point system to reward users for participating in the Experience Cloud site.

How is my Experience Cloud site reputation calculated?

The reputation level on your profile is calculated based on your total points.

Enable Reputation in Your Experience Cloud Site

Enable reputation so that site members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation. Community managers know that recognition and a little friendly competition usually lead to more active members. Enabling reputation turns on a default point system and a set of reputation levels in the Experience Cloud site. A community manager can personalize labels and point values.

Members start to accrue points by performing the actions that have assigned point values. When the member exceeds the top of the level's point threshold, they move up a level. They, and other members, see their reputation level on their profile and when hovering over their name. Total points also show on member's profiles.

Note: When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Select **Enable setup and display of reputation levels**, then click **Save**.

After you enable reputation, a default point system and set of reputation levels is available. The default reputation points are as follows:

Action	Points
Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit settings:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Action	Points
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

If your selected Experience Cloud site doesn't have Chatter enabled, the Reputation section doesn't appear. To show the Reputation section, go to **Administration** > **Preferences** and select **Show all settings in Workspaces**.

SEE ALSO:

Set Up Reputation Levels

Set Up Reputation Points

How is my Experience Cloud site reputation calculated?

Set Up Reputation Levels

Update the default reputation levels to meet your Experience Cloud site's needs and help motivate your members.

When reputation is enabled, 10 default levels are added. You can add or remove levels, give each level a name, and update the point range and image for each level.

Note: An Experience Cloud site must have at least three reputation levels and can have up to 50.

1. Open Experience Workspaces.
2. Click **Administration** > **Reputation Levels**.

   From here you can:

   - Upload your own image for each reputation level. To upload a new image, click the default image and browse to an image file.

     Note: You can't revert to the default reputation level images from the Salesforce user interface. Instead, use Connect REST API.

   - Give each level a name, such as "Beginner," "Intermediate," and "Expert." If you don't assign a name, the default is used. For example, "Level 1," "Level 2," "Level 3."
   - Edit the point range for a level.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To update reputation levels:

- Manage Experiences

  AND

  Is a member of the Experience Cloud site

When you update the higher value of a level's point range, the lower value for the next level is automatically adjusted when you save.

- Add more levels by clicking **Add a level**, located underneath the list of levels.
- Remove a level by clicking ⊗ next to the level.

3. Click **Save**.

You can now update the point system for the site. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions through comments, likes, and shares. Reputation level increases are posted to member feeds.

You can translate reputation level names so that international members can view their reputation levels in the appropriate language. In Translation Workbench, select the `Reputation Level` setup component and then expand the node next to your site.

SEE ALSO:

Set Up Reputation Points

Set Up Reputation Points

Set up a point system to reward users for participating in the Experience Cloud site.

When reputation is enabled, there is a default point system setup. When users perform the actions with assigned point values, their total points increase and they start to move towards the next reputation level.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user gets no points.

The table shows the default events and points.

Action	Points
Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To update reputation points:

- Manage Experiences

  AND

  Is a member of the Experience Cloud site

Action	Points
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Questions and answers in the feed are not to be confused with the Chatter Answers functionality.

Note: In orgs with reputation enabled before the Winter '15 release, actions associated with questions and answers are available at the time of the release. Their default point values are set to 0. The release doesn't affect existing user reputation points, and users don't accrue points from these actions until you configure point values for them.

1. Open Experience Workspaces.
2. Click **Administration** > **Reputation Points**.
3. Update the points for each action. If you don't want users to accrue points for a certain action, set the Points to *0*.
4. Click **Save**.

Point totals show up on profile pages beneath the photo. Point totals are visible to anyone in the Experience Cloud site.

Tip: You can directly update reputation points for a member via the Salesforce API. You can also use Apex triggers to send custom notifications based on changes to reputation points.

SEE ALSO:

Set Up Reputation Levels

How is my Experience Cloud site reputation calculated?

The reputation level on your profile is calculated based on your total points.

Points are accrued when you perform activities that your community manager has assigned point values. You could also potentially gain points if your posts or comments draw reaction from other members. For example, your community manager may have decided that writing a post earns you 5 points. If someone else shares your post, your community manager may decide that you should earn 10 points because your post is influencing others to contribute.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user gets no points.

Default point values are as follows. Keep in mind that your community manager may have customized these values. For more information, contact your community manager.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Action	Points
Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

SEE ALSO:

Enable Reputation in Your Experience Cloud Site

Share a Link to Your Experience Cloud Site

You can allow members to preview your Experience Cloud site before making it active.

You can share the link for a preview site only with users who were added as members of the site.

Sharing a link to an Experience Cloud site in `Preview` status allows you to easily gather stakeholder feedback. The site functions just as it will when you make it active, so stakeholders can try out all functionality and review your branding and customizations. Additionally, you can take advantage of having early members who can post, comment, and share records so that members enter an active site from their first login.

1. Open Experience Workspaces.
2. Click **Administration** > **Settings**.
3. Copy the URL displayed on the page and share it with your stakeholders.

SEE ALSO:

Customize Salesforce Tabs + Visualforce Sites

Experience Cloud Site Statuses

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To share a preview URL for your site:

- Create and Set Up Experiences

Switch Between Your Salesforce Org and Your Experience Cloud Sites

If you use Experience Builder sites and Lightning Experience, use the App Launcher to switch back and forth between your Salesforce org and your Experience Cloud sites associated with it. If you use Tabs + Visualforce sites and Salesforce Classic, use the global header. You can embed a site URL directly into buttons or links. You can also redirect a user to another site or to a specific page within another site.

Switching between your Salesforce org and your sites doesn't disrupt your workflow. You're returned to the page you were working on, either in the current browser tab (standard apps) or in a new browser tab (connected apps and communities). If you're using the App Launcher or the global header, whichever sites you're a member of are displayed as a dropdown or tile.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

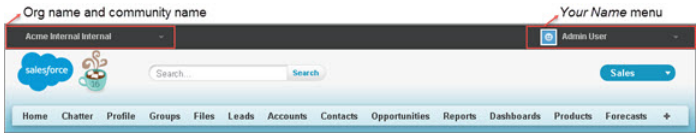
App Launcher for Experience Builder Sites and Lightning Experience

The App Launcher is available to some on Experience Builder templates.

In Lightning Experience, the full view of the App Launcher displays a tile for every published site along with your apps. In Experience Builder sites, the App Launcher displays a tile for every published site and app but the All Items area and AppExchange link aren't available. Members see only the sites and apps that they're authorized to see according to their profile or permission sets.

Note: The App Launcher isn't available in Salesforce Tabs + Visualforce sites. Members of these sites can use the global header to switch between their Salesforce org and their sites.

Global Header for Tabs + Visualforce Sites and Salesforce Classic



The menu on the left side lets you switch between sites and your Salesforce org.

- The dropdown shows all the active sites associated with your org that you're a member of.
- If you have the "Create and Set Up Experiences" permission, you also see previews of sites that you're a member of.
- Internal users who aren't members of any sites only see the company name.
- External users see the dropdown menu only if they belong to more than one active site.
- External users who are members of only one active site don't see the dropdown menu in the site.

Important: Functionality can be affected if you're setting up a My Domain that hasn't finished deployment. For example, if you switch from a site to an internal org, you're directed to the Salesforce login page instead. After your domain is deployed, selecting your organization in the dropdown directs you to the internal organization as expected.

The `Your Name` menu on the right side contains links to edit contact information and log out. Internal users can also access Salesforce Help and links to Setup and other tools depending on user permissions and enabled features.

Embedded Site URLs

If you want to allow users to switch between their site and their Salesforce org, you can also embed site URLs into buttons or links.

- Enable the global header to make site URLs visible.
- Copy the URL of the site you want to link to.
- Embed the URL wherever you want it to appear on your site.
- Disable the global header if you want. Users are still able to switch from one site to the next without another login.

You can also direct users to a specific page in a site, such as a checkout cart—rather than a homepage. To redirect your customers to a specific page, add the following parameter to your company URL:

/servlet/networks/switch?networkId=`<your 15 digit salesforce site ID, which can be found at the end of the site URL>`&startURL=`<subpath URL of specific page you want to direct customers to>`

A few things to keep in mind:

- If you don't provide a networkId parameter in the servlet url, users are directed out of sites and back into their Salesforce org.
- The startURL is the specific subpath to the page starting with "/s/".

Important: The site switcher doesn't work when a user is logged in as another user. To log in as another user, go to the contact detail page and click **Login to site as user** and select the site you want to log in to. Switching to another site as another user only works if the specified URL is a root path.

SEE ALSO:

Enable the App Launcher in Experience Builder Sites

Enable the Global Header for Salesforce Tabs + Visualforce Sites

Experience Cloud

Use Reporting in Experience Cloud Sites

Use reporting to see short-term and long-term trends in various areas of your Experience Cloud site. The preconfigured AppExchange package makes reporting a snap for community managers. You can also give the power of reporting to your members.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Track User Engagement with Google Analytics 4

For insights into page visits and user engagement, add Google Analytics 4 to your enhanced LWR site from Experience Builder.

Report on Experience Cloud Sites with AppExchange Packages

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Experience Workspaces.

Enable Analytics in Your Experience Cloud Site

Enable Analytics for Experience Cloud sites to allow your partner and customer users to view and explore Analytics dashboards.

Web Analytics and Reporting in Experience Cloud Sites

When you invest in creating a site, community, or portal, you want to measure your investment's performance and gain insights on how you can improve your site's engagement. Having site web analytics and data with reports and dashboards at your fingertips can help you iterate your site's direction. Use Salesforce and third-party analytics tools to stay up to date on your site's engagement numbers. Some reporting capabilities require add-on licenses.

Reports and Dashboards for Site End Users

Creating reports for your site's end users and giving them the ability to access the reports is a powerful tool. For example, your partners can see reports on leads and opportunities to sell faster. Some reporting capabilities require add-on licenses.

Report and Dashboard Considerations for Sites

If the Reports and Dashboards tabs are exposed in the Experience Cloud site, external users can access reports and dashboards.

Track User Engagement with Google Analytics 4

For insights into page visits and user engagement, add Google Analytics 4 to your enhanced LWR site from Experience Builder.

If you don't have a Google Analytics account, refer to the GA4 documentation from Google to set one up. You must create a GA4 property with a Web data stream.

Google Analytics 4 allows users to track specific user interactions with page content. These interactions are called events. The out-of-the-box integration tracks certain events, including:

- Page views
- Scrolling
- File downloads
- Outbound clicks, which occur when a visitor selects a link that takes them to a separate domain.

If you want to track other events, you can develop your own using custom events. For more information about events, see [GA4] Enhanced Measurement Events.

1. In Experience Builder, go to Settings and select Integrations.
2. For Google Analytics 4, click **Add to Site**.
3. Enter your Google Analytics Measurement ID, and save the change.
4. Publish the site. Google Analytics begins tracking user engagement after you publish.

To stop Google Analytics from tracking user engagement, you can remove it from the site. Existing data for the site is still available in your Google Analytics account.

You can also change the Google Analytics Measurement ID. On the Integrations page, click **Edit** for Google Analytics 4, and enter a different Measurement ID. Then publish the site.

Note: For testing purposes, you can publish the site from a sandbox or Developer Edition org. However, we recommend that you wait until you can deploy your site to production before you make it available to the public.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR sites

USER PERMISSIONS

To create an Experience Cloud site:

- Create and Set Up Experiences AND View Setup and Configuration

To customize an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND View Setup and Configuration AND an experience admin, publisher, or builder in that site

To publish an Experience Cloud site:

- Be a member of the site AND Create and Set Up Experiences

  OR

- Be a member of the site AND an experience admin or publisher in that site

Report on Experience Cloud Sites with AppExchange Packages

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Experience Workspaces.

Use the Salesforce Communities Management package to:

- Take advantage of the newest features using preconfigured reports (use the latest package version)
- View the latest metrics and rapidly spot trends
- Determine how fast your Experience Cloud site is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas that need attention
- Take immediate action on recent activity with Insights reports
- Understand the health of your community with the Service Community Scorecard

Note: To use the preconfigured Insights reports, your Experience Cloud site must use Chatter.

During installation, dashboard and report folders are automatically installed in your internal org. You also have the option to give your community managers access to the package contents so you don't have to share the dashboard and report folders with them later. If you have no previous Insights or dashboards mapped in Experience Workspaces, they're automatically mapped for you during installation.

Search AppExchange for Salesforce Communities Management (for Communities with Chatter) or Salesforce Communities Management (for Communities without Chatter).

Each package has related documentation, attached as a PDF, to help guide you with your installation and customizations.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Experience Workspaces, site-specific data is displayed.

Note: The mappings for the Moderation report folders are included in the Salesforce Communities Management for Experience Cloud Sites managed package and you can't delete them. To remove the mappings, uninstall the package. The uninstall procedure deletes all report folders and dashboards included in the package.

SEE ALSO:

Enable and Map Dashboards

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

USER PERMISSIONS

To install AppExchange packages:

- Download AppExchange Packages

Enable Analytics in Your Experience Cloud Site

Enable Analytics for Experience Cloud sites to allow your partner and customer users to view and explore Analytics dashboards.

Note: Only users with a Customer Community Plus, Partner Community, or Lightning External Apps Plus license can use this feature. This feature is supported in Experience Cloud sites but not in portals.

To share Analytics dashboards in your Experience Cloud site, complete the following steps.

1. Set up Analytics in your Salesforce org, as described in the Set Up the CRM Analytics Platform section.
2. Enable Analytics for Experience Cloud and set up site members. See Enable CRM Analytics for Experience Cloud Sites.
3. In Analytics, create dashboards and save them in an Analytics app. Designate that app for sharing with the community. For more information about working with Analytics, refer to the Analytics Library.
4. Embed your Analytics dashboards using either Experience Builder or Visualforce.
5. From the Analytics app containing your dashboards, give access to site members by selecting **Share**. In the Share dialog, select **Enable sharing with Communities**. Invite site partners and customers to share the app.

For more information, see Share CRM Analytics in Experience Cloud.

EDITIONS

Available in: Salesforce Classic and Lightning Experience

Experience Cloud is available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Analytics is available for an extra cost in: **Enterprise**, **Performance**, and **Unlimited** Editions. Also available in: **Developer** Edition

USER PERMISSIONS

To create, customize, or activate an Experience Cloud site:

- Create and Set Up Experiences

  AND is a member of the site they're trying to update

To modify Analytics settings:

- Analytics Growth permission set license with Manage Analytics permission

To view, explore, and share embedded Analytics dashboards:

- Analytics for Communities permission set license with View Analytics on Experience Cloud Site Pages permission

Web Analytics and Reporting in Experience Cloud Sites

When you invest in creating a site, community, or portal, you want to measure your investment's performance and gain insights on how you can improve your site's engagement. Having site web analytics and data with reports and dashboards at your fingertips can help you iterate your site's direction. Use Salesforce and third-party analytics tools to stay up to date on your site's engagement numbers. Some reporting capabilities require add-on licenses.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Track Site Activity with Custom Reports

Create custom reports to track usage, moderation, and other activity in your Experience Cloud site.

Enable and Map Dashboards

Use dashboards in Experience Cloud sites to measure their success. You can even map a dashboard to the Experience Workspaces Home page. Map custom dashboards or use the ones provided in our AppExchange package.

Insights for Engagement

Insights are reports that help community managers monitor activity and take action on that activity. Insights make it easier to manage day-to-day moderation tasks, encourage engagement, and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups, trending topics, and even recent Chatter contributions. The main difference between Engagement Insights and dashboards are that Insights let you take immediate action on recent activity in your Experience Cloud site, and the reports in dashboards let you see trends.

Login History Report Codes

The Login History Report includes a Login Status Column that displays codes. Each code identifies a unique event that happens during login. The following list describes what each code means.

Track Site Activity with Custom Reports

Create custom reports to track usage, moderation, and other activity in your Experience Cloud site.

To monitor the health of your Experience Cloud site, create custom report types and then create a report using that custom report type. If you want your community managers to see your report, create or edit a dashboard to include your report and then map the updated dashboard.

Note: Only reports that are based on the Networks object show Experience Cloud site-specific information. By using reports based on the Networks object, you can create one custom report and use it across all your sites.

Use the following table to get started with reporting for Experience Cloud sites.

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
Chatter Usage	Networks > Chatter Messages	Create reports on the private message activity.[1]
Chatter Usage	Networks > Feed Revisions	Create reports on posts and comments that your members have edited.
Chatter Usage	Networks > Groups	Create reports on groups.
Moderation	Networks > Network Audits	Create reports on all moderation activity and history. To report on moderation activity in private Chatter messages, filter the report by `Audited Object Type` (on the Network Audits object) to equal `Chatter Message`.
Moderation	Networks > Network Members > Network Activity Audit — Moderators	Create reports on members who either flagged items or moderated a flagged item.
Moderation	Networks > Network Members > Network Activity Audit — User	Create reports on the members whose items were flagged, blocked, or replaced.
Moderation	Networks > Network Members > User Login	Create reports on frozen members.
Moderation	Networks > Network Moderations > Content Documents Networks > Network Moderations > Feed Posts Networks > Network Moderations > Feed Comments Networks > Network Moderations > Private Messages	Create reports on content that is currently flagged. These reports allow you to see the actual contents of the flagged item. For example, you can see the contents of a flagged private message to easily determine if the message is spam.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To create custom report types:
- Manage Custom Report Types

To create, edit, and delete reports:
- Create and Customize Reports

To create and share dashboards:
- Manage Dashboards in Public Folders

To report on Chatter Messages:
- Moderate Experiences Chatter Messages

High-level usage	Primary Object > B (Child Object) > C (Child Object, If Applicable)	Description
Moderation	Networks > Unpublished Feed Entities > Feed Posts	Create report on posts that are pending review and approval.
Public Activity	Networks > Network Public Usage Daily Metrics	Create reports on the daily public site page views and unique visitors.
Recommendations	Networks > Recommendation Metric	Create reports on custom recommendation usage.
Topic Activity	Networks > Topics	Create reports on topic activity.
Topic Activity	Networks > Topic Assignments	Create reports on topic assignments.
User Activity	Networks > Network Activity Daily Metrics	Create reports on the daily number of posts and comments by member type.
User Activity	Networks > Network Members > Login History	Create reports on login activity. This report includes only direct logins to the site. If a user logs in to an org and then switches to a site, their login activity isn't included.
User Activity	Networks > Network Membership Daily Metrics	Create reports on the daily count of total active members, new members added, and external member logins by member type.
User Activity	Networks > Network Unique Contributor Daily Metrics	Create reports on the unique daily contributors. A member is counted as a contributor if they posted or commented on a group or a user profile.
User Profile Photos	Networks > Network Members	To report on user profiles with or without photos, filter the report by `Has Profile Photo` (on the Network Members object) to equal `True` or `False`.

Create a Report for a Site

Create a custom report to gauge the success and engagement levels on your Experience Cloud site.

1. Create custom report types based on the Networks object. Only reports that are based on the Networks object show Experience Cloud site-specific information in Experience Workspaces. You can create reports based on other objects and expose them in Experience Workspaces. Keep in mind that they show data from across your org, not just for the site in which you're viewing them.
2. Select Networks as the primary object, and the appropriate child object in your custom report type depending on what type of analysis you want to do.
3. Use the custom report type to create a report.

Be sure not to filter the report by Network ID. Filtering by Network ID ensures that the report dynamically displays data for the Experience Cloud site that you view it from. When you add a Network ID filter, it causes the report to show data only for the site with that Network ID. The report shows this limited data, regardless of which site you view it in.

SEE ALSO:

Report on Experience Cloud Sites with AppExchange Packages

Salesforce Help: Create a Custom Report Type

Enable and Map Dashboards

Use dashboards in Experience Cloud sites to measure their success. You can even map a dashboard to the Experience Workspaces Home page. Map custom dashboards or use the ones provided in our AppExchange package.

You can choose to map any dashboard you have access to, but ensure that your community managers have access as well.

All dashboards display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure you're using a supported browser.

Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

If the Salesforce Communities Management package is installed in your org, each of the pages has a default mapping to a dashboard from the package. You can overwrite these values as needed.

To map or update your dashboards:

1. Open Experience Workspaces for your site.
2. Click **Dashboards** > **Settings**.
3. For each of the pages, select the dashboard you want to show to community managers. To change the name of the dashboard page, click inside the dashboard label.

   The dashboard you map to Home displays on your Experience Workspaces Home page.
4. Click **Save**.

   Dashboards are visible to community managers when they expand the Dashboards section or visit the Home page in Experience Workspaces.

Verify the dashboard mappings by clicking **Dashboards** and then clicking each page name. If you mapped a dashboard to the Home page, check that out too.

Create a Dashboard

While you can show any dashboard in your Experience Cloud site, we recommend creating them based on the custom report types available for sites.

All dashboards show as Lightning dashboards, regardless of the type of dashboard that you use or the interface that your org uses. For example, a Salesforce Classic dashboard is displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure to use a supported browser.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To map dashboards in Experience Workspaces:

- Create and Set Up Experiences OR Manage Experiences

  AND

  Manage Dashboards in Public Folders

  AND

  Is a member of the Experience Cloud site

To view dashboards:

- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

1. Create a dashboard with components. Select the report as your source type. Add a component for each report you want to include in your dashboard. Find your report on the Data Sources tab and add it to the component.
2. Share the folder that you save your dashboard in with your community managers.
3. From Experience Workspaces, click **Dashboards** > **Settings** to map your dashboard.

When a community manager accesses Experience Workspaces, the dashboard appears under Dashboards. If you mapped a dashboard to the Home page, the dashboard appears there.

Dashboards in Experience Workspaces are automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your Experience Cloud site can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

Note: Experience Cloud sites don't fully support dashboard subscriptions. If you subscribe to dashboards, you receive email notifications with updated dashboard information, but you can't click through to the dashboard from the email notification.

Remember that you can customize your dashboards at any time. To edit your dashboard, go to the **Dashboards** > **Settings** page in Experience Workspaces. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link doesn't work.

For a Salesforce Classic dashboard to render optimally in the Lightning view used in Experience Workspaces, make sure that your dashboard meets these requirements.

Note: Metrics are supported in the Lightning view, but they display as large tiles. We recommended that you don't include metrics in your dashboards.

- Includes only up to 20 reports arranged within three columns
- Doesn't include unsupported charts, such as funnel, scatter, table, multi-metric, pie, and gauge

  For a list of dashboard features not supported in the Lightning view, see Reports and Dashboards: Lightning Experience Limitations.

View a Site's Dashboards

Use dashboards to monitor the health of your Experience Cloud site.

1. Open Experience Workspaces.
2. Click **Dashboards**.
   Pages that have dashboards mapped to them appear in the Dashboards section or on the Home page.
3. Click the dashboard page that you want to view.
   For an immediate refresh of dashboard data, click **Refresh**

   If you access the dashboard after it was recently refreshed, the dashboard shows the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your site can refresh dashboards set up with Run as specified user and Run as logged-in user up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There's no refresh limit for internal users.

   Note: Experience Cloud sites don't fully support dashboard subscriptions. If you subscribe to dashboards, you receive email notifications with updated dashboard information, but you can't click through to the dashboard from the email notification.
4. To view a related report, click **View Report** on the dashboard.

   Remember that the dashboards are configured to show site-specific data.

Be sure not to filter the report by Network ID. Filtering by Network ID ensures that the report dynamically displays data for the Experience Cloud site that you view it from. When you add a Network ID filter, it causes the report to show data only for the site with that Network ID. The report shows this limited data, regardless of which site you view it in.

Customize a Site's Dashboards

Customize your dashboards to manage and prioritize the metrics that you want to view for your Experience Cloud site.

1. Click **Dashboards** > **Settings** in Experience Workspaces.
2. To edit the dashboard name, click the Label field and enter your changes.
3. To map to a different dashboard, click the down arrow right of the Dashboard field, and then click the desired dashboard.
4. To edit the dashboard in your internal Salesforce org, click **Edit Dashboard.**

Note: If you're using a dashboard that was created in Lightning Experience, the edit link doesn't work.

SEE ALSO:

Salesforce Help: Create a Custom Report Type

Share a Report or Dashboard Folder in Salesforce Classic

Insights for Engagement

Insights are reports that help community managers monitor activity and take action on that activity. Insights make it easier to manage day-to-day moderation tasks, encourage engagement, and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups, trending topics, and even recent Chatter contributions. The main difference between Engagement Insights and dashboards are that Insights let you take immediate action on recent activity in your Experience Cloud site, and the reports in dashboards let you see trends.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

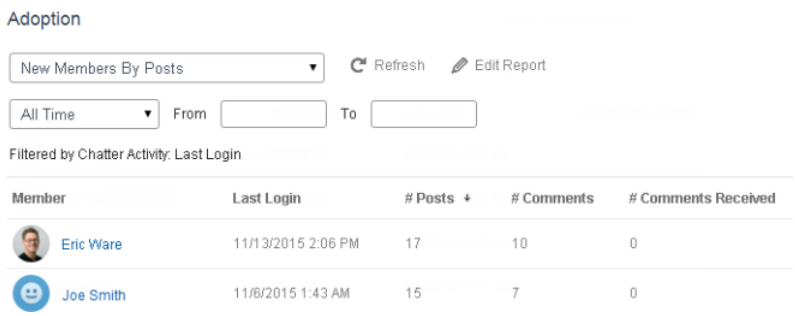
Applies to: LWR, Aura, and Visualforce sites

Tip: Let us do the setup work for you! Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

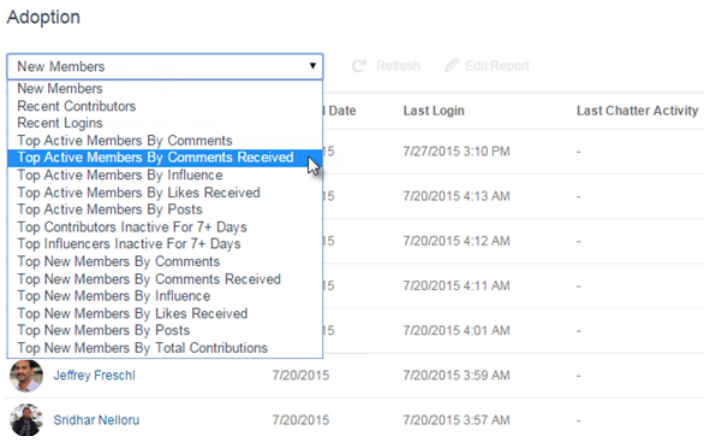
Insight reports provided in the package are 100% customizable. You can change the default page names, report folder mappings (except moderation report folder mappings), and even the report columns and filters at any time. So don't be afraid to customize or change what you get in the package.

To map Engagement Insights dashboards, in a site's Workspaces, click **Dashboards** > **Engagement**.

Example: With an Insights report set up to track new members, community managers can quickly navigate to a new member's profile to send them a welcome message.



They can also access other reports about members directly from the Insights page using the drop-down menu.



View and Customize Engagement Insights

Use Engagement Insights to monitor recent activity and immediately take action. Engagement Insights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your Experience Cloud site.

Each Engagement Insights page includes multiple reports. You can access these reports using the dropdown menu on the page. On the Engagement Insights page, links are automatically created for report fields such as `Created By` or `Group Name`. For posts, comments, and messages, you can even see the contents directly on the page.

Engagement Insights are powerful tools that you can use to perform mass-actions. For example, if a spammer attacks your site, you can select all the offending posts and click **Delete Post**.

Important: Some Engagement Insights actions require special permissions. If you can't perform an action, let your admin know.

1. Open Experience Workspaces.
2. Click **Dashboards** or **Moderation**.

USER PERMISSIONS

To view Engagement Insights in Experience Workspaces:

- Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To customize Engagement Insights reports:

- Create and Customize Reports

Note: Your admin maps Engagement Insights pages. If the Dashboards or Moderation section doesn't include any Engagement Insights pages, your admin hasn't mapped them yet.

Pages with mapped report folders appear when you expand the sections.

3. Click the Engagement Insights page you want to view.

- To access other Engagement Insights reports, use the dropdown menu.
- Take action! Only the first two actions are displayed on the page. To see more actions, click next to the displayed actions. You can select up to 100 rows at a time.
- To filter the report by relative and custom date ranges, use the dropdown date filter. Select one of the following relative date ranges: All Time, This Week, This Month, Last Month, Today, Yesterday, Last 7 Days, and Last 30 Days. You can also enter your own custom date range.
- To sort the report by a specific column, click the column heading. An arrow on the column indicates whether the report is sorted by ascending or descending order.
- To edit or customize the report, click to open the report in your internal org. From there you can customize the report to fit your needs, such as adding or removing columns and updating the report filters.
- To edit the actions assigned to a page, click to open the Edit Engagement Insights Actions page.

  Actions that appear on the Engagement Insights report are displayed based on the data returned in the report. For example, if the report returns data about a user, the **Freeze Member** and **Unfreeze Member** actions are displayed. If the report stops returning data, actions aren't removed. However, when you go to update the actions, we let you know that some are no longer appropriate.

  Each Engagement Insights report can have its own actions. You can edit these actions at any time, but keep in mind that an Engagement Insights report must have at least one action. Actions displayed in the picklist on the Edit Engagement Insights Actions page are all the available and appropriate actions for your report, including custom actions.

Engagement Insights reports are automatically refreshed when you access them. You can also force an update.

Create Custom Actions for Insights

Do more with Insights reports with custom actions. Say a spammer attacks your Experience Cloud site. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

When you click an Insights action in the report, behind the scenes a Visualforce page drives the action. The Visualforce page links to standard or custom objects using standard controllers or standard list controllers.

Here are the high-level steps of how to create a custom Insights action.

USER PERMISSIONS

To create, edit, and set version settings for Visualforce pages:
- Customize Application

To edit custom Visualforce controllers:
- Author Apex

1. Create a Visualforce page.

   There are a few options you can use:

   - Use a standard controller

     Choose this option to create a Visualforce page that contains the same functionality and logic used in standard Salesforce pages. For example, if you use the standard Accounts controller, clicking a **Save** button in a Visualforce page results in the same behavior as clicking **Save** on a standard Account edit page.

   - Use a standard list controller

     Choose this option to create a Visualforce page that can display or act on a set of records. Examples of existing Salesforce pages that work with a set of records include: list pages, related lists, and mass action pages.

   - Use a controller extension that uses Apex

Choose this option if you want to expose new functionality, customize the navigation through an application, use callouts or web services, or if you need finer control for how information is accessed for your page.

All options work with standard objects and custom objects.

For detailed information about these options, see the Visualforce Developer Guide.

2. Add your custom action to the Insights report.

   Actions are displayed based on the data returned in the report. Make sure that you have a report that is currently returning the data your action needs.

   a. Open Experience Workspaces.

   b. Navigate to the Insights report that you want to apply your new custom action to.

   c. On the report, click ⚙ and then add your custom action from the picklist.

3. Ensure that your users have the correct permissions to complete your custom action.

Depending on how you set up your custom action, after the action is executed, the user either stays on the Insights page or is redirected to a page in your internal org. Unlike our standard Insights actions, users don't receive the standard success or failure message for custom actions.

Example: Here's an example of a custom action to delete all activity from an Experience Cloud site member. This custom action is great for cleaning up thesite after a spam attack.

Create a custom controller extension using an Apex class and use it in your Visualforce page. The following `DeleteAllActivityControllerExtension` class is an example of a custom controller extension.

```
public with sharing class DeleteAllActivityControllerExtension {

    private List<Id> ids;
    private String retURL;
    private Database.DeleteResult[] deleteResult = null;
    private Map<String, String> resultMap;
    private String success = 'success';
    private String failure = 'failure';

   public DeleteAllActivityControllerExtension(ApexPages.StandardController controller)
 {
        resultMap = new Map<String, String>();
        /* The IDs you select on the Insights page are stored in a comma separated
string of IDs.
        This string is passed in a parameter called "idsList" */
        String idsList = ApexPages.currentPage().getParameters().get('idsList');
        //The return URL to the Insights page is passed in a parameter called "retURL"

        retURL = ApexPages.currentPage().getParameters().get('retURL');
        ids = idsList.split(',');
    }

    public PageReference deleteAllActivity() {
        deleteFeedPosts();
        deleteFeedComments();
        //Include these two lines of code to be redirected to the Insights page after
 you click the action.
        PageReference retPage = new PageReference(retURL);
```

```
        retPage.setRedirect(true);
        Integer failureCount = calculateFailureCount();
        Integer successCount = ids.size() - failureCount;
        retPage.getParameters().put(success, String.valueOf(successCount));
        retPage.getParameters().put(failure, String.valueOf(failureCount));
        return retPage;
   }

   private void deleteFeedPosts() {
        List<FeedItem> feedItems = [Select Id, CreatedById FROM FeedItem WHERE
CreatedById IN :ids];
        deleteResult = Database.delete(feedItems, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedItems.get(i).CreatedById),
failure);
                    }
                }
            }
        }
   }

   private void deleteFeedComments() {
       List<FeedComment> feedComments = [Select Id, CreatedById FROM FeedComment WHERE
 CreatedById IN :ids];
        deleteResult = Database.delete(feedComments, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                       resultMap.put(string.valueOf(feedComments.get(i).CreatedById),
 failure);
                    }
                }
            }
        }
   }

   private Integer calculateFailureCount() {
       Integer failureCount = 0;
       for (String result : resultMap.values()) {
            if (failure == result) {
                failureCount++;
            }
        }
        return failureCount;
   }

}
```

This code creates a **Delete All Activity** button in your Insights report. This button deletes all posts and comments for any selected members. If you wanted to delete all private messages and files too, you could expand the code.

Note:

- This code example doesn't include any permission checks. This custom action only works for admins.
- The IDs for the items you selected on the Insights report are passed to the Visualforce page using the `idsList` parameter.

The following Visualforce markup shows how the custom controller extension can be used in a page.

```
<apex:page standardController="User"
extensions="DeleteAllActivityControllerExtension" action="{!deleteAllActivity}"
/>
```

SEE ALSO:

Salesforce Help: Visualforce Pages as Global Custom Actions

Visualforce Developer Guide: Standard Controllers

Visualforce Developer Guide: Standard List Controllers

Visualforce Developer Guide: Building a Controller Extension

Login History Report Codes

The Login History Report includes a Login Status Column that displays codes. Each code identifies a unique event that happens during login. The following list describes what each code means.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Contact Manager**, **Developer**, **Enterprise**, **Group**, **Performance**, **Professional**, and **Unlimited** Editions

Codes

Code	Meaning
0	Successful login
102	Username found, password invalid
107	More than one username found
301	Session timeout
302	Page requires login
303	Page requires different Salesforce login on same instance
304	Page requires Salesforce login on different instance
501	Cannot log in from given domain
502	Log in at given time
503	User must log in from org domain
601	Offline client trial expired
602	Offline disabled

Code	Meaning
603	Outlook disabled
801	Wireless client trial expired
802	Wireless disabled
901	Offline PDA trial expired
902	Offline PDA disabled
999	Unrecoverable error
1000	Client app not accessible for the login user
1001	Client app requires update for the login user
1201	Invalid ID specified
1300	Restricted login limit exceeded
1400	Invalid login or store not available for the org
1402	Store not available to a user
1403	Store down or inaccessible
20014	Password lockout in effect
20017	Organization marked as inactive
20018	User marked as inactive
20020	Organization locked out
20021	Organization closed
20032	Organization suspended
20037	Username found, password invalid
20058	CSS user password lockout
20253	User's profile doesn't have access to this portal
20605	Organization is in maintenance
30001	The URL for the organization's SSO authentication service is not a valid URL
30002	The organization's SSO authentication service is down (couldn't connect, timeouts, SOAP fault returned, and so on)
30003	The organization's SSO authentication service said that the supplied credentials are invalid

Reports and Dashboards for Site End Users

Creating reports for your site's end users and giving them the ability to access the reports is a powerful tool. For example, your partners can see reports on leads and opportunities to sell faster. Some reporting capabilities require add-on licenses.

Allow External Users to Create and Edit Reports

Partner and customer users can create, delete, and edit reports in their own personal folder or, with sufficient permission, in a privately shared folder. Grant partner and customer users permissions to create and edit reports through their profiles or permission sets. After you grant the required permissions, partners and customers can use the drag-and-drop Report Builder tool.

Allow External Users to Access and Report on Tasks and Events

Take the following steps to give access to your portal and Experience Cloud site users to report on tasks and events.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

Allow External Users to Create and Edit Reports

Partner and customer users can create, delete, and edit reports in their own personal folder or, with sufficient permission, in a privately shared folder. Grant partner and customer users permissions to create and edit reports through their profiles or permission sets. After you grant the required permissions, partners and customers can use the drag-and-drop Report Builder tool.

Important:

- If your org was created before the Summer '13 release, then before granting external users permissions you must first turn on enhanced sharing for reports and dashboards.
- To create, customize, and delete reports, external users must use the Report Builder tool.

Data visibility is based on two things: the user role the partner or customer belongs to and your organization's sharing rules. Your organization's field-level security is respected. So, if a field isn't visible for external users, a partner or customer user doesn't see it in Report Builder.

1. To let external users create and edit reports, assign Create and Customize Reports, Report Builder, and Edit My Reports permissions through custom profiles or permission sets. If you want external users to export report data, also assign them Export Reports permission.

   In Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets** or **Profiles**. Assign the following permissions:

External User Permissions Needed to Create and Edit Reports	
To create, customize, and delete reports in a personal folder:	Create and Customize Reports
To create, customize and delete their own reports in a privately shared folder with Viewer access:	Edit My Reports
To export report data:	Export Reports

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To create permission sets or enable custom permissions in profiles:

- Manage Profiles and Permission Sets

To assign a permission set to a user:

- Assign Permission Sets

To share a report folder with external users:

- Manager folder access or Manage Reports in Public Folders

You can give permission to create and edit reports to all role-based external users with licenses. For example, you can give permission to Customer Community Plus and Partner Community. You can also give permission to all legacy role-based portal licenses, such as Customer Portal and Gold Partner.

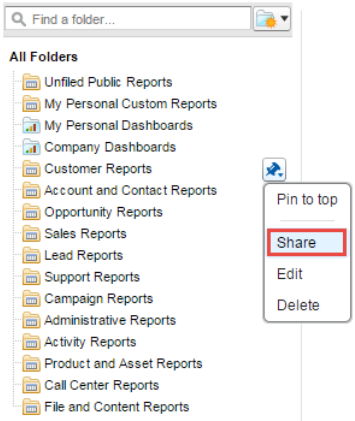
Note:

- These permissions aren't available to high-volume user licenses, such as Customer Community, High Volume Customer Portal, Service Cloud Portal, and Authenticated Website.
- External users with legacy portal licenses can create and edit reports in Experience Cloud sites, but not in portals.
- Users with Customer Account Portal, Partner Central, and Customer Service templates can create, edit, and delete reports in Experience Cloud sites. If you don't see the New Report button, enable reports and add the Report List page to your site. If the button doesn't appear after you enable Reports, republish your site.
- Objects that don't have a sharing rule for external users can't be accessed by external users with the licenses listed. If an object is set to Public Read and no sharing rule is present, it shows an error on the report when accessed by the external user.
- Objects that don't support standard sharing (using Sharing settings) aren't visible in reports intended for external users.

2. If you want your external users to create or edit reports in a privately shared folder, grant them Viewer access on the folder.

   On the **Reports** tab in the Folders view, click next to the folder you want to share, then select **Share**.

   Note: Partner and customer users can't create, edit, or view reports in the Unfiled Public Reports folder.



Depending on the objects, fields, and categories that your external users can access, they sometimes see custom report types in the UI when they create a report. If a user has read access on any fields or objects included in the custom report type, custom report types are visible.

Create a Report from Your Site with Report Builder

With the new Report Builder page, external users can create, edit, and delete reports directly from their Experience Cloud site.

Create a Report from Your Site with Report Builder

With the new Report Builder page, external users can create, edit, and delete reports directly from their Experience Cloud site.

To access Report Builder and the Report run page, enable reports for your sites. You can grant partner and customer users permissions to create and edit reports through their profiles or permission sets.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

User Permissions Needed	
To create permission sets or enable custom permissions in profiles:	Manage Profiles and Permission Sets
To assign a permission set to a user:	Assign Permission Sets

To let external users create and edit reports, turn on Create and Customize Reports, Report Builder, and Edit My Reports permissions through custom profiles or permission sets. If you want external users to export report data, assign them Export Reports permission.

External User Permissions Needed to Create and Edit Reports	
To create, customize, and delete reports in a personal folder:	Create and Customize Reports AND Report Builder
To create, customize and delete their own reports in a privately shared folder with Viewer access:	Edit My Reports AND Report Builder
To export report data:	Export Reports

The Report Builder page and Report Run are available in the following site templates:

- Customer Account Portal
- Partner Central
- Customer Service

External users can create, edit, and delete reports directly in their site from Report Builder.

1. Select the **Report** tab, and click **New Report**.
2. In Report Builder, create and customize your report.

After you enable reports for your community the **New Report** button, and the option to view reports using the Report run page are available. To view the **New Report** button, add the Report List page to your community. If the button doesn't appear after you enable Reports, republish your community.

With all Salesforce reports, to view, edit, or delete a report you must have access to it.

SEE ALSO:

Share a Report or Dashboard Folder in Salesforce Classic

Compare Access Levels for Report and Dashboard Folders

Allow External Users to Access and Report on Tasks and Events

Take the following steps to give access to your portal and Experience Cloud site users to report on tasks and events.

1. From **Salesforce Setup**, access the **Object Manager**.
2. Access Tasks or Events, depending on which objects you must give access to.
3. Click **Fields & Relationships** > `Public` > **Set Field-Level Security**. Check all the profiles you'd like to have access to this field and click **Save**.
4. Click **Page Layout** and add the Public field to your Task or Event object's page layout.
5. Click **Save**.

Note:

- These steps allow you to make the Public field visible to external users. However, for tasks and events to show up in reports, the Public field must be checked when the task or event is created. You can set up a flow to automatically check all new and edited tasks and events and being public. To include previously created tasks and events in reports, you must manually select the **Public** field.
- However, if you use the Tasks and Events standard report type, all activities are displayed regardless of whether the "Public" box is checked.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

Report and Dashboard Considerations for Sites

If the Reports and Dashboards tabs are exposed in the Experience Cloud site, external users can access reports and dashboards.

Important: To allow external users to create and edit reports, your org must use the enhanced sharing model.

You can give permission to create and edit reports to Experience Cloud site users with the following licenses:

Experience Cloud site licenses:

- Customer Community Plus
- Customer Community Plus Login
- Partner Community
- Partner Community Login
- Lightning External Apps Plus

Portal licenses:

- Customer Portal Manager

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: Aura and Visualforce sites

- Customer Portal Manager Custom (for Enterprise Administration users)
- Customer Portal Manager Standard
- Customer Portal Manager User
- Gold Partner
- Ideas Only Portal
- Overage Customer Portal Manager Custom
- Overage Customer Portal Manager Standard
- Partner
- Silver Partner ("Export Reports" permission isn't available to this license)

Note:

- These permissions aren't available to high-volume user licenses, such as Customer Community, High Volume Customer Portal, Service Cloud Portal, and Authenticated Website.
- External users with legacy portal licenses can create and edit reports in Experience Cloud sites, but not in portals.
- Users with Customer Account Portal, Partner Central, and Customer Service templates can create, edit, and delete reports in Experience Cloud sites. If you don't see the New Report button, enable reports and add the Report List page to your site. If the button doesn't appear after you enable Reports, republish your site.
- Objects that don't have a sharing rule for external users can't be accessed by external users with the licenses listed. If an object is set to Public Read and no sharing rule is present, it shows an error on the report when accessed by the external user.
- Objects that don't support standard sharing (using Sharing settings) aren't visible in reports intended for external users.

After you grant permission to your external users, they still can't:

- Schedule reports or dashboards for email and refresh at a specific date and time

  Note: The refresh button isn't available in Experience Builder sites accessed through mobile devices.

- Create, edit, or view reports in the Unfiled Public Reports folder

All role-based external users in your Experience Cloud site can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

All role-based external users can be selected for the "Run as specified user" option.

SEE ALSO:

Create a Report from Your Site with Report Builder

Experience Cloud Considerations

Keep the following considerations in mind when creating sites with Experience Cloud.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

How Experience Cloud Uses Lightning

There's lots of Lightning striking Salesforce these days and it can be tricky to know how it all works together. Here's the rundown.

Who Can See What in Experience Cloud Sites

Experience Cloud sites contain different user types who require varying levels of access. What users can see in a site depends on their user type and which tabs the administrator selects when creating the site. This topic offers a set of tables that describes what users with different access levels can see and do with different site features.

Experience Builder Site Limitations

Be aware of the limitations that apply to Experience Builder sites such as Customer Service and Partner Central.

Experience Cloud Sites Usage Allocation

Experience Cloud site usage is governed by daily, monthly, and yearly allocations. Understanding these allocations is important to the success of your sites. Salesforce provides tools to help you monitor site usage so that you can avoid exceeding these allocations, or purchasing overages when needed.

Experience Cloud License Limitations

Here are a few limitations related to communities licenses, used in Experience Cloud.

Experience Cloud Licenses Eligible for Upgrades

In general, you can upgrade from most customer licenses to the Customer Community Plus or Partner Community licenses. Specifically, we support license upgrades for all users where their `UserType` equals `CSPLitePortal` (in the Salesforce API) to `PowerPartner` or `PowerCustomerSuccess`.

Experience Cloud Site User Account Ownership Limitations

Consider these limitations when assigning ownership of accounts to external users.

About High-Volume Community or Site Users

High-volume community or site users in Experience Cloud are limited-access users intended for orgs that have thousands to millions of users.

Share Personal Contact Information Within Experience Cloud Sites

Users can specify which information from their profile is visible to external users, such as customers and partners, and guests viewing publicly accessible pages that don't require login.

Hide Unneeded Visualforce Pages on Your Experience Cloud Site

To avoid exposing pages that don't reflect your brand or that allow for alternative ways to log in to your site, be aware of these guidelines when configuring Visualforce pages that are part of your Experience Cloud site. Understand the relationship between Experience Cloud sites and Salesforce Sites, their public Visualforce pages, and steps to take for a proper configuration.

Additional Experience Cloud Site Limitations

Here are a few limitations when using features in Experience Cloud sites.

How Experience Cloud Uses Lightning

There's lots of Lightning striking Salesforce these days and it can be tricky to know how it all works together. Here's the rundown.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

What is Salesforce Lightning?

Lightning includes a new experience, framework, and environment. Lightning makes it easier to build responsive applications for any device.

Lightning includes these technologies:

- **Lightning Component Framework**, which gives you a UI development framework that accelerates development and app performance.
- **Lightning App Builder** lets you build Lightning pages visually, without code, using standard and custom Lightning components. You can make your Lightning components available in the Lightning App Builder, so admins can build custom user interfaces without code.
- **Experience Builder** is like the Lightning App Builder, except that it's used to design and build Experience Builder sites using Lightning components. Just like Lightning App Builder, you can use standard or custom components so admins can create Experience Builder pages with point-and-click customization.

Some Salesforce products built with the Lightning framework include Lightning Experience, the Salesforce mobile app, and the various Experience Builder site templates (like Customer Service, Partner Central, and Help Center) and Lightning Bolt Solutions.

What is Lightning Experience?

Lightning Experience is the name of for the desktop user experience, intended for internal Salesforce users only. For more information, see the Lightning Experience section in Salesforce Help.

When people talk about "Lightning sites", what do they mean?

Lightning in the context of Experience Cloud means the use of Lightning components to build communities, sites, and portals. Build using templates, such as Customer Service, Partner Central, or Lightning Bolt Solutions.

How is the Lightning framework used in Experience Cloud sites?

Experience Cloud sites and Lightning Experience use the same *underlying* Lightning framework technology—but it isn't necessary to enable Lightning Experience to use Experience Cloud sites.

Think of it this way: You have a dishwasher and a washing machine in your house. Can you turn one on without the other? Yes. Sure, they have a few things in common: They both need electricity to work, they both live in your house, and have the word "wash" in their names. But they run independently of one another.

Here are some common questions (and answers!) to consider when you're thinking of using component-based site templates.

Do I first turn on Lightning Experience in my internal org to use Experience Builder sites?

No. It's not required that you enable Lightning Experience to use Experience Builder sites, such as Customer Service, Partner Central, and Lightning Bolt Solutions. Experience Cloud sites use the same underlying technology as Lightning Experience, *but are independent of one another*.

If I turn on Lightning Experience in my internal org, can I still use the Salesforce Tabs + Visualforce template for a site?

Yes! Turning on Lightning Experience for your internal users has no impact on what templates you use in our external-facing sites.

You can build your site with the Lightning framework or with Visualforce. The UI enabled in your internal Salesforce org makes no difference to what UI technology you use for your external-facing site.

If I build a custom Lightning component for the Lightning App Builder, can I use it in Experience Builder?

Yes! See the Experience Cloud Developer Guide for more information.

Can I enable Lightning Experience for my Salesforce Tabs + Visualforce sites?

No. By definition, a Salesforce Tabs + Visualforce site uses Visualforce technology under the hood. There's no button in a Salesforce Tabs + Visualforce site that allows you to switch to Lightning technology. Also, remember that Lightning Experience is a user experience that's for internal Salesforce users only.

If you want a site with the Lightning look and feel, create one with a template that uses Lightning technology.

If I turn on Lightning Experience in my internal Salesforce org, are there Experience Cloud features that I can't use?

Switch to Salesforce Classic for the following functionality.

Feature or Setting	Available with Differences	Not Available	Notes
Global header		✓	To switch between your org and Experience Cloud sites in Lightning Experience orgs, use the App Launcher.
Cloning or creating email templates as a Partner Community or Customer Community Plus user		✓	
Enabling WDC Thanks to use Mission Badges in Experience Builder sites		✓	

Note: Most of the Experience Cloud functionality that isn't supported in Lightning Experience affects only Salesforce admins. But being limited to admins doesn't prevent you from enabling Lightning Experience in your org. You can always enable Lightning Experience for most profiles in your Salesforce org, and give the System Admin profile the option to switch to Salesforce Classic.

Who Can See What in Experience Cloud Sites

Experience Cloud sites contain different user types who require varying levels of access. What users can see in a site depends on their user type and which tabs the administrator selects when creating the site. This topic offers a set of tables that describes what users with different access levels can see and do with different site features.

Note: The behavior that's described in these tables doesn't consider updates to the site sharing model or user sharing.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

	Administrator or Salesforce user with "Create and Set Up Experiences" permission	Salesforce Site Member (all Salesforce licenses including Chatter Free and Chatter Only)	External site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
Administer sites in Salesforce	Can create sites, customize tabs and branding, add or remove members, and activate or deactivate a site. User must also have the "Customize Application" permission to create or customize sites.	Not available	Not available
Global Header (for use in Salesforce Classic orgs)	The dropdown in the global header shows a list of sites the user created or can access. Also links back to their internal org. Can access setup for all sites, regardless of status. Can see sites in `Preview` status.	The dropdown in the global header shows a list of sites that the user created or an org. Also links back to their internal org. Can't access sites in `Inactive` status. If a link is provided, can see sites in `Preview` status.	The dropdown in the global header shows a list of sites that the user can access. Can't access sites in `Inactive` status. If a link is provided, can see sites in `Preview` status.
`Your Name` menu in Global Header (in Salesforce Classic)	Same as in internal org.	Same as in internal org. Chatter Free users see a My Settings menu, an Edit Contact Info menu, and a Logout link. For Chatter Free users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across the internal org and all sites that users can access. This overlay is different from the My Settings page that other internal users see if the org has enabled the improved Setup user interface.	Can see a My Settings menu, an Edit Contact Info menu, and a Logout link. For external users, the My Settings menu opens an overlay where they can update location settings, security settings, email settings, and approved connections. These settings apply across all sites that users can access. This overlay is different from the My Settings page that other internal users see if the org has enabled the improved Setup user interface.
Access to Experience Workspaces or site Management menu in Global Header	Admins or users with "Manage Sites" can see the menu and use it to preview the site. Such users can also access site settings in Experience Builder, Site.com Studio, and Lightning Platform. The Experience Builder option	Users with "Manage Sites" can see the menu and use it to preview the site or access Experience Builder, Site.com Studio, and Lightning Platform. The Experience Builder option doesn't appear for sites created	Not available

	Administrator or Salesforce user with "Create and Set Up Experiences" permission	Salesforce Site Member (all Salesforce licenses including Chatter Free and Chatter Only)	External site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
	doesn't appear for sites created from the Salesforce Tabs + Visualforce template. This menu only appears within site Management.	from the Salesforce Tabs + Visualforce template. This menu only appears within site Management.	
Salesforce Help	Can see Salesforce Help.	Standard Salesforce user sees Salesforce Help. Chatter Free user sees Chatter help.	Not available
People	Can see everyone else in the site and vice versa.		
Profiles and people hovers	Can see all contact information fields (such as Title, Work Phone, and Email) on all site members' profiles. In people hovers, user always sees members' Title, Work Phone, and Mobile Phone fields.		Can see all members' First Name, Last Name, and Nickname fields and profile photos. But can see only the contact information fields that members have chosen to show to external users. By default, Title is shown while all other fields aren't. In people hovers, user sees Title, Work Phone, and Mobile Phone fields only if the member has chosen to show them.
Records (such as accounts, leads, opportunities)	Can see records that they own, and records that they have access to (based on sharing rules) across all sites and their internal org.	Standard Salesforce user sees records that they own, and records that they have access to (based on sharing rules) across all sites and their internal org. Chatter Free user can't access records.	Can see records that they own, and records that they have access to (based on sharing rules and permissions) across all sites.
Dashboards and Reports	Can view and create dashboards and reports		Role-based external users can create and edit reports in Experience Cloud sites, but not in legacy portals. However, there are some exceptions. For more information, see Allow External Users to Create and Edit Reports. All role-based external users can refresh dashboards.

	Administrator or Salesforce user with "Create and Set Up Experiences" permission	Salesforce Site Member (all Salesforce licenses including Chatter Free and Chatter Only)	External site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category. Chatter Free users can't be granted access to Knowledge.	Visibility on the article's category.
Site User Visibility	Can set visibility on a site-by-site basis, by checking **See other members of this site**. After it's checked, members of that site can see each other and members of other sites that they belong to that also have enabled user visibility.	If enabled, members can see other members within their site and members of other sites that they belong to that have selected **See other members of this site**.	If enabled, members can see other members within their site and members of other sites that they belong to that have selected **See other members of this site**.

Chatter Visibility

	Salesforce Administrator	Salesforce Experience Cloud Site Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Experience Cloud Site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
Groups	A user can see all groups within a site and join them. The user can't see groups from other sites they belong to or their internal org. Can create groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post. Admins can also control whether users in the org and external users can create groups through the "Create and Own New Chatter Groups" user permission.	A user can see all groups within a site and join them. The user can't see groups from other sites they belong to or their internal org. Can create groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post.	A user can see all groups within a site and join them. The user can't see groups from other sites they belong to or their internal org. Can create groups. In groups user is a member of, can post, comment, post files or links, or share someone else's post.

	Salesforce Administrator	Salesforce Experience Cloud Site Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Experience Cloud Site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
Files	Regardless of the current site, users see all their files. They see the files that they own, that are shared with them directly, that they can access in a library, or that are posted to a record that they can access. Files posted to groups and shared with an entire site can be viewed only in that site. There's a difference between when files are *visible* and when they're *shareable* through feeds. **Visible:** Files in libraries are visible, regardless of the site where the files were uploaded. For a file on a record to be visible, the site must be able to access the record and the library that the file is in. **Shareable:** A user can share a file across sites if they're sharing to a record and the file is in a library. A file can be shared to a Chatter group only within the same site where it was originally uploaded. A user can't share a file from the file detail page in sites, even for files that can be shared through Chatter.		Regardless of the current site, users see all their files. They see the files that they own, that are shared with them directly, or that they can access in a library. Portal users see files that are posted to records that they can access, unless the record post was marked "Internal Only". There's a difference between when files are visible and when they're shareable through the Chatter publisher. Files in libraries are visible, regardless of the site where the files were uploaded. A user can share files across sites through the Chatter publisher as long as those files are in libraries that the user can access. However, they can share files that aren't in libraries only within the site where the files were uploaded.
Profiles	Can see profiles for all members in the current site.		Can see profiles for all members in the current site. Can't see profiles of users in the internal org. Profile visibility enforces user sharing.
Recommendations	User gets people, group, file, and record recommendations for the current site only.		
Activity and Influence	Can see activity statistics and influence for the current site. All activity on records, such as posts and comments, is counted in the user's internal org and not in the site where the activity occurred.		Can see activity statistics and influence for the current site. All activity on records, such as posts and comments, isn't counted in the user's activity statistics and influence.

	Salesforce Administrator	Salesforce Experience Cloud Site Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Experience Cloud Site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
Email Notifications	Email notification preferences are set per site. Within a site, users can control their Chatter email notifications in their personal settings. Can control email notifications for their internal org from their personal settings. (Enter `Chatter` in the `Quick Find` box, then select **Email Notifications**.) Within a site, all users can control group email notifications on each group's page. Chatter personal email digests aren't supported in Experience Cloud. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who have this option selected are automatically switched to daily digests.	Email notification preferences are set per site. Within a site, standard Salesforce user can control their Chatter email notifications in their personal settings. Can control email notifications for their internal org from their personal settings. (Enter `Chatter` in the `Quick Find` box, then select **Email Notifications**.) Chatter Free user can control Chatter emails for their sites under `Your Name` > **My Settings** > **Email Settings**. The chosen settings apply to the current site. Within a site, all users can control group email notifications on each group's page. Chatter personal email digests aren't supported in Experience Cloud. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who have this option selected are automatically switched to daily digests.	Email notification preferences are set per site. Within a site, external users can control their Chatter email notifications under `Your Name` > **My Settings** > **Email Settings**. Portal users can also control group email notifications on each group's page. Chatter personal email digests aren't supported in Experience Cloud. Group digests are supported, but the option to receive email notifications for every post is disabled when groups exceed 10,000 members. All members who have this option selected are automatically switched to daily digests.
Topics	Can see hashtag topics and Chatter topics for the current site only. Topics are visible in feeds, the topics list, topic detail pages, Trending Topics, and Recently Talked About topics.		
Favorites	Can add search, topic, and list view favorites in the current site.		Can add only topic favorites in the current site.
Chatter Messages	In their list of Chatter messages, can see private messages that	In their list of Chatter messages, can see private messages that	In the user's list of Chatter messages, can see all messages

	Salesforce Administrator	Salesforce Experience Cloud Site Member (all Salesforce licenses including Chatter Free and Chatter Only)	External Experience Cloud Site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
	they’ve sent or received in their internal org and any sites that they're a member of. Can send a Chatter message to a member of a common site. But must initiate the message within the site that the target user is a member of. Administrators with “Manage Chatter Messages” and “API Enabled” permissions can delete messages. The API allows users to send Chatter messages across sites.	they’ve sent or received in their internal org and any sites that they're a member of. Can send a Chatter message to a member of a common site, but must initiate the message within the site that the target user is a member of.	that they’ve sent or received in any site they're a member of. Can send a Chatter message to a member of a common site, but must initiate the message within the site that the target user is a member of. Chatter messages are accessed through the Chatter tab, which can be disabled for external site members. When using Chatter messages in sites, ensure that the Chatter tab is enabled.
Messenger (Chat)	Messenger isn’t available with Experience Cloud sites.		

Feeds Visibility

This table shows what each kind of user can do or see in Chatter Feeds within a site.

	Salesforce Administrator	Salesforce site Member	External site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
Post on a record	Can post on any records within the site.	Can post on any records within the site that the user can access.	Can post on any records within the site that the user can access.
Bookmark a post	Can bookmark posts within the current site. The Bookmarked feed only contains posts from the current site.		
Mention someone	Can mention people specific to the current site. User can't mention an external user on an internal post.		Can mention people specific to the current site.
Share a post (repost)	Can share a post only in the current site.		
Add topics to a post	Can add hashtag topics and Chatter topics to any posts within the current site. Topics are specific to the current site and can't be accessed from another site.		

Search Visibility

Search Functionality in Experience Cloud Sites varies slightly from the search in the internal org. Search results respect sharing rules for all items by default. This table describes what each type of site user can see in search results.

Search Results For	Administrator	Salesforce site Member	External site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
People	People specific to the current site.		
Users	• Other partners and customers in the site can't search information in hidden fields on a profile. But users in the company's internal org can search this type of information. • Portal users can't search for users in the site when sidebar search is enabled. • When external site members search for users, global search and enhanced user lookups (**All Fields** selected) query the following limited set of fields on user records: – Name – Username – User ID – Body – Email – Phone – Custom fields With global search from the internal org, uneven results can occur when searching for a site User record. Here's why and what to do about it. Each site has a unique network ID. When a site user is created through **Contact record** > **Create External User**, the new User record is assigned to a site's network ID. Global search looks for records in the internal org, which has a different network ID than the site. A global search doesn't search inside sites. Since the User record is associated with a site network ID, global search doesn't return results for that record. The workaround is to create User records in the internal org, and then associate the records to a site. It's possible to associate an internal User record to a site by linking the internal record to a Contact record. After the link is forged, the User record is discoverable through global search. The User record's network ID is now associated with the internal org.		
Groups	Groups specific to the current site.		
Files	Visibility in the current site: • Owned files • Files shared with the user in a public or private group • Files shared with the entire site Visibility in any site:		Visibility in the current site: • Owned files • Files shared with the user in a public or private group

Search Results For	Administrator	Salesforce site Member	External site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
	• Files posted on accessible records and record feeds • Salesforce CRM Content library files that the user can access Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.		• Files shared with the entire site Visibility in any site: • Files posted on accessible records and record feeds (unless the file posted on the record is marked "Internal Only") • Salesforce CRM Content library files that the user can access Files owned by a user are always visible in search results for that user, regardless of how they were uploaded.
Topics	Topics specific to the current site.		
Feeds	Feed posts and comments from within the site where the search is performed. Global search returns information from all feed contexts. Contextual feed search returns information from the context where the search is performed. For example, results can come from the context of a feed on a user profile, a record, or a group. To find information in a different site feed, users must search from within that site.		
Search Auto-Complete	Recently accessed items specific to the current site.		
Records (accounts, contacts, leads, and so on)	Full visibility for all items across all sites and in the internal org.	Visibility for all items that the user can access through their user profile or permission sets across all sites and in the internal org.	Visibility for all items that the user can access through their user profile or permission sets across all sites.
User lookups on records	All users across all sites and in the internal org.		Users who are members of all sites that the user is also a member of, and other external users associated with the same external account. Users with the partner portal license also see the owner of the portal account. The Recently Viewed Users list in the lookup shows all users

Search Results For	Administrator	Salesforce site Member	External site Member (Customer Portal, Partner Portal, Partner site, Customer site, Lightning External Apps, or Lightning External Apps Plus license)
			that they can access via their license, profile settings, permission sets, and sharing rules. If user sharing is enabled in the org, this behavior varies depending on how it's configured. For external site members, enhanced user lookups search within a limited set of fields when the **All Fields** option is selected.
Lookup searches on records	Full visibility for all items across all sites and the internal org.	Visibility for all items that the user can access through their user profile or permission sets across all sites and the internal org.	Visibility for all items that the user can access through their user profile or permission sets across all sites.
Lookup searches in site Management	Lookups in site Management and Experience Workspaces initially return the items that the user most recently viewed from within the site. If an object that the user is looking for isn't in the Recently Viewed Documents list, they can try typing all or part of the object name and searching again.	No	No
Salesforce Knowledge Articles	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the category.	Salesforce Knowledge User License, `Read` permission on the article type, and visibility on the article's category.	Visibility on the article's category.

Differences Between the Full Salesforce Site and the Salesforce Mobile App

There are minor differences in Experience Cloud sites between the full site and the Salesforce mobile app. From an object page:

- the Salesforce mobile app displays a recently viewed list only for the selected object.
- The full site displays a recently viewed list that can be changed to display any recently viewed objects.

Note: site users on the Salesforce mobile app are shown the default list view that's specified for the object. Whether Salesforce mobile app users see a recently viewed list depends on the default list view chosen. The recently viewed list doesn't appear for custom objects.

SEE ALSO:

Experience Cloud

Experience Builder Site Limitations

Be aware of the limitations that apply to Experience Builder sites such as Customer Service and Partner Central.

General Limitations

- Lookup fields aren't supported for custom objects or in Experience Builder sites created before Spring '16.
- When Experience Builder site users save an opportunity, they're not prompted to add products, even when the **Prompt users to add products to opportunities** setting is enabled. Only users in sites built with Salesforce Tabs + Visualforce are prompted to add products.
- In multilingual sites, the login page for the site appears in the default language. To create login pages in other languages, use custom Visualforce pages.
- Google reCAPTCHA only works when access to Google web traffic is allowed. Causes for these disruptions vary, and can include network outages or government-mandated blocks. If a large percentage of your site is blocked from Google web traffic, consider requiring users to log in to post to the site.
- The Create New option for lookups isn't supported in Customer Service sites. Also, only authenticated external users (not guest users) can access asset lookup fields.
- For guest users, case validation doesn't run when cases are submitted through the Contact Support component. Validation runs after the submission is processed in the queue. Salesforce recommends writing custom client-side validation or writing custom Apex before inserting triggers to sanitize the case content.
- Customer users can't be added to account teams.

Partner Sites

- Partner Central doesn't support the language selector.
- To protect your sales data, we disable guest user access for the navigation menu in Partner Central by default.
- Partner Central doesn't provide default self-service customer support features, such as navigational topics, articles, and the search publisher. To extend support to your partners, consider exposing cases in your community and creating a quick action button for creating cases.
- You can't export sites built on Partner Central as Lightning Bolt solutions. You can export individual pages, but not the entire site.

Browser Limitations

Note: Customers accessing your Experience Builder sites from unsupported browsers receive a warning that site features may not work as intended and are directed to use a different or updated browser for the best experience. They can still choose, after the warning, to use the site with their current browser and reduced effectiveness, if they want. For the list of Salesforce supported browsers, see Supported Browsers for Experience Cloud Sites on page 9.

- Mobile devices using the BlackBerry or Microsoft Windows operating systems aren't supported.

- Mobile users who perform the pinch-zoom gesture on Experience Cloud site preview images zoom into the center of the image, and not a specific area of the preview image.
- Internet Explorer versions before 11 aren't supported. We've created a page that automatically lets your users know that they must either upgrade or use a newer browser.

  You can also redirect to your own page that informs users that those browsers aren't supported. Create a file such as *ieRedirect.js*, and include this code in the file.

  ```
  if (window.attachEvent && !window.addEventListener) {
   window.location = '<your redirect page>';
  }
  ```

  Then link to the redirect file in the head markup of the site. In Experience Builder, click > **Advanced**, click **Edit Head Markup**, and add this code.

  ```
  <script src="path/to/ieRedirect.js"></script>
  ```

- Only the latest versions of Chrome, Firefox, and Safari (on Mac operating systems) are supported.

LWR Site Limitations

An LWR site supports up to 500 routes, or unique URLs. For best performance, keep the number of routes below 250. Dynamic content can help keep your number of routes lower. For example, don't create an individual page with a unique route for each content item. Instead, use record details to represent your content, and then create a single page that shows record details and requires only one route.

Experience Cloud Sites Usage Allocation

Experience Cloud site usage is governed by daily, monthly, and yearly allocations. Understanding these allocations is important to the success of your sites. Salesforce provides tools to help you monitor site usage so that you can avoid exceeding these allocations, or purchasing overages when needed.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Edition	Bandwidth Allocation (per rolling 24-hour period per community)	Service Request Time (per rolling 24-hour period per site)	Maximum Page Views
Developer Edition	500 MB	10 minutes	N/A
Enterprise Edition	1 GB for sandbox 40 GB for production	30 minutes for sandbox 60 hours for production	500,000
Unlimited Edition Performance Edition	1 GB for sandbox 40 GB for production	30 minutes for sandbox 60 hours for production	1,000,000

Bandwidth

The number of megabytes served and received from both the community's origin server and the cache server. The origin server refers to the Web server that hosts your community site. The cache server refers to the CDN server that serves your cache community

site pages. This allocation is only calculated for non-authenticated community users."Rolling 24-hour period" refers to the 24 hours immediately preceding the current time.

Service Request Time

The total server time in minutes required to generate pages for the community. This allocation is only calculated for non-authenticated community users.

"Rolling 24-hour period" refers to the 24 hours immediately preceding the current time.

Page View

A request from a non-authenticated community user to load a page associated with your community. Requests from authenticated community users are not counted as page views. Cached page views are also counted.

Requests that Count as Page Views

Requests for the following *are* counted as page views.

Requests for...	Example
Your Experience Cloud site domain	`http://MyDomainName.my.site.com`
Your custom Experience Cloud site web address	`http://site.mycompany.com`

Any page associated with your Experience Cloud site	`http://MyDomainName.my.site.com/mypage`
	`http://MyDomainName.my.site.com/s/mypage`
	`http://site.mycompany.com/mypage`
	`http://site.mycompany.com/s/mypage`

Custom login pages	

Requests that Do Not Count as Page Views

Requests for the following are ***not*** counted as page views.

Requests for...	Example
Authorization Required error page	`http://MyDomainName.my.site.com/unauthorized`
AJAX requests: • JavaScript remoting • Visualforce	• Apex: RemoteAction • Visualforce: <apex:actionFunction>
Resources loaded on the page, such as `robots.txt` or the favorite icon	`http://MyDomainName.my.site.com/robot.txt` `http://site.mycompany.com/favicon`
Attachments and documents	
Error pages, apart from Authorization Required, such as Limit Exceeded and Maintenance	`http://MyDomainName.my.site.com/BandwithExceeded`
Tab clicks within a page	
Images included in an HTML field	`http://MyDomainName.my.site.com/servlet/rtaImage`

Requests for...	Example
Custom file field	`http://MyDomainName.my.site.com/servlet/fileField`
System pages associated with your Experience Cloud site, such as the login, logout confirmation, and forgot password pages	`http://site.mycompany.com/login` `https://site.mycompany.com/s/login`
API REST calls	`http://MyDomainName.my.site.com/Service/apexrest`

Page View Allocations

The following table lists Experience Cloud site page view allocations for each edition. This allocation applies to all the Experience Cloud sites in your org.

Edition	Maximum Number of Communities	Maximum Page Views
Enterprise Edition	100	500,000/month
Unlimited Edition Performance Edition	100	1,000,000/month

A few things to bear in mind with page view allocation:

- Your org's page view entitlement is the sum of page views included in the edition plus any additional page views purchased from Salesforce.
- Salesforce calculates page view overages by looking at a 12-month look-back period. If your site page views exceed the org allocation for page views, contact Salesforce to understand how to buy overages. Site members and unauthorized users can still access your Experience Cloud site, even if your org goes over its page view allocation.

Let's look at Acme Enterprises, which has set up a customer community. Their Enterprise Edition org includes 500,000 page views per month. Acme expects its community to take off, so they purchase another 500,000 page views per month. Their total page view entitlement is 1 million page views per month. So, over the course of a 12-month look back period, Acme's community can have 12 million page views (that's 12 x 1 million page view allocation).

The community has a spike in usage for a month, and goes over its 1 million allocation. Is Acme charged an overage? No, because the next month the community has fewer than 1 million page views. It all averages out when the calculation is made at the end of the 12-month look back period. In short, the community has to average 1 million page views per month over the course of a 12-month look back period to remain below its allocation.

Monitoring Usage

Accurately monitor your site's page view usage with the Page Views - Monthly Trend report, found in Community Management Package for Communities from the AppExchange. Install the package that is right for your communities:

- Community Management Package for Communities with Chatter
- Community Management Package for Communities without Chatter

You can also see page view usage in your org's Company Information section. In Setup, enter `Company Information` in the **Quick Find** box and click **Company Information**.

Note: The page view allocation found under Usage-Based Entitlement may not reflect the correct allocation for your Salesforce edition.

API Usage Allocation in Experience Cloud Sites

Communities API usage limits listed here are in addition to your Salesforce org's API limits.

	Customer Community	Customer Community Plus	Partner Community	Lightning Platform Starter	Lightning Platform Plus
API Calls per Day	0	200 per member (member-based license) 10 per member (login-based license)	200 per member (member-based license) 10 per member (login-based license)	200 per member for Enterprise Edition orgs 200 per member for Unlimited Edition orgs	1000 per member for Enterprise Edition orgs 5000 per member for Unlimited Edition orgs

Experience Cloud License Limitations

Here are a few limitations related to communities licenses, used in Experience Cloud.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

- There are different requirements for username uniqueness depending on the type of license your community is using. Customer Community, Customer Community Plus, and External Identity licenses require unique usernames within the Salesforce org that an Experience Cloud site belongs to. Employee Community licenses require unique usernames across all Salesforce orgs that the user belongs to.
- A user with a Partner Community license must be associated with a business account that is enabled as a partner account. Partner users can't be associated with person accounts.

  Partner Community licenses don't require a unique username, which leaves the username uniqueness requirement up to you. Check out Set Partner Username Uniqueness Requirement to the Org Level on page 654 to configure.
- Users with community and portal licenses can't create or update email templates.
- Customer Community licenses support sharing sets, but not sharing rules. And currently, sharing sets don't support objects that are associated with multiple other objects of the same type. To use such features, your community members must have the Customer Community Plus or Partner Community license. With that said, sharing sets support the Contacts to Multiple Accounts feature by using the **RelatedAccount** value in the sharing-set configuration.
- Customer users with the following licenses can't update case statuses in communities built on the Salesforce Tabs + Visualforce template on desktop browsers.
  - Customer Community
  - High Volume Portal User
  - Customer Portal
- Users with the Partner Community license can't access the Quotes tab in Experience Cloud sites using the Salesforce Tabs + Visualforce template. They can view, modify, and update quotes according to their permissions from other locations in the UI, such as from opportunities.
- The **Enable notifications for sites** permission is read-only and can't be changed for Partner Community profiles.

Experience Cloud Licenses Eligible for Upgrades

In general, you can upgrade from most customer licenses to the Customer Community Plus or Partner Community licenses. Specifically, we support license upgrades for all users where their `UserType` equals `CSPLitePortal` (in the Salesforce API) to `PowerPartner` or `PowerCustomerSuccess`.

Note: Community licenses are used to access Experience Cloud sites.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

You can upgrade the following licenses to the Customer Community Plus or Partner Community licenses.

- Customer Community
- External Identity (enables access to the Salesforce Customer Identity product)
- High Volume Customer Portal
- Overage High Volume Customer Portal
- Authenticated Website User Overage
- Authenticated Website User

There are other customer licenses associated with the `CSPLitePortal` user type that support license upgrades, but with some loss of data access. For example, the user may lose access to some objects they previously had access to, or the new license might not include one or more user permissions available with the previous license.

Warning: *We strongly recommend that you explore what permissions are affected before you upgrade a user's license. The user's new license, profile, role, and permission set assignments should provide at least the same or comparable level of data access as previous assignments.*

Considerations When Upgrading a User's License

- Explore what permissions are affected before you upgrade a user's license. The user's new license, profile, role, and permission set assignments should ideally provide at least the same or comparable level of data access as previous assignments.
- The Customer Community Plus and Partner Community licenses require the user to have a role, which imposes a few restrictions.
  - ***An upgrade to a license that requires a role is irreversible.***
  - If the user belongs to an account that doesn't have roles, we create one for you.
  - If the account does have roles and you don't specify one, we associate the user with the lowest role in the hierarchy: Partner <Account Name> User or Customer <Account Name> User.
- Before upgrading a user to the Partner Community license, enable the user's account as a partner account. A partner account can be associated with both customer and partner users, so customer users on the same account aren't affected.
- A license upgrade automatically removes sharing sets, permission sets, and permission set license assignments previously associated with the user.
- License upgrades are subject to most limits that apply to new users, such as the maximum number of licenses and roles in your org, username uniqueness requirements, and so on.
- Changes in profiles and permission sets might affect site membership. Ensure that upgraded users have access to the intended Experience Cloud sites.
- We recalculate sharing rules that apply to the upgraded user, for example through their public groups, criteria-based sharing, and record ownership (implicit sharing).
- Users upgraded to the Customer Community Plus are automatically associated with the All Customer Portal Users public group. Similarly, users upgraded to the Partner Community licenses are associated with the All Partner Users public group.

License Conversion and Upgrade Compatibility

Original license	Convert to...		
	Customer Community (Named User or Login Based)	**Customer Community Plus (Named User or Login Based)**	**Partner Community (Named User or Login Based)**
Partner Gold Partner Silver Partner Bronze Partner	⊘ Switching from a partner portal license to a Customer Community license would result in a loss in functionality. An admin must disable the contact as a Partner User and re-enable as a Customer User.	⊘ Switching from a partner portal license to a Customer Community Plus license would result in a loss of functionality. An admin must disable the contact as a Partner User and re-enable as a Customer User.	✅ An admin can change the license type and profile on the user record.
Customer Portal Manager Custom Customer Portal Manager Standard Overage Customer Portal Manager Custom Overage Customer Portal Manager Standard	⊘ Switching from a customer portal license to a Customer Community license would result in a loss in functionality. An admin must disable the contact as a Customer User, and then re-enable as a Customer User to create a user record and associate it with the new license.	✅ An admin can convert a Customer Portal Manager Custom, Customer Portal Manager Standard, Overage Customer Portal Manager Custom, or Overage Customer Portal Manager Standard license (for a named user) to a Customer Community Plus license and vice versa, by changing the license type and profile on user record.	⊘ An admin must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.
External Identity High Volume Customer Portal Overage High Volume Customer Portal Authenticated Website User Overage Authenticated Website User	✅ An admin can change the license type and profile on the user record.	✅ An admin can change the license type and profile on the user record.	✅ An admin can change the license type and profile on the user record.
Customer Community	✅ An admin can convert a Customer Community license (for a named user) to a Customer Community Login license and vice versa, by changing the license type and profile on user record.	✅ An admin can change the license type and profile on the user record.	✅ An admin can change the license type and profile on the user record.

Original license	Convert to...		
	Customer Community (Named User or Login Based)	**Customer Community Plus (Named User or Login Based)**	**Partner Community (Named User or Login Based)**
Customer Community Plus	⊘ Switching from a Customer Community Plus license to a Customer Community license would result in a loss in functionality. An admin must disable the contact as a Customer User, and then re-enable as a Customer User to create a user record and associate it with the new license.	✅ An admin can convert a Customer Community Plus license (for a named user) to a Customer Community Plus Login license and vice versa, by changing the license type and profile on user record.	⊘ An admin must disable the contact as a Customer User, ensure the account is enabled as a Partner Account, and then enable the contact as a Partner User.
Partner Community	⊘ Switching from a Partner Community license to a Customer Community license would result in a loss of functionality. An admin must disable the contact as a Partner User and re-enable as a Customer User.	⊘ Switching from a Partner Community license to a Customer Community Plus license would result in a loss of functionality. An admin must disable the contact as a Partner User and re-enable as a Customer User.	✅ An admin can convert a Partner Community license (for a named user) to a Partner Community Login license and vice versa, by changing the license type and profile on the user record.
External Apps	✅ An admin can convert a Customer Community license (for a named user) to a Customer Community Login license and vice versa, by changing the license type and profile on user record.	✅ An admin can change the license type and profile on the user record.	✅ An admin can change the license type and profile on the user record.

To upgrade users with other license types, you must deactivate them, create user identities for them, migrate their data over, and associate it with their new user records.

Upgrade Experience Cloud User Licenses

Upgrading an Experience Cloud user license allows you to give them access to more data within your site. With the right combination of permissions via the user's new license, profile, role, and permission sets, you can preserve the user's record and Chatter history.

Migrate Community Users Between Licenses

You can move community users between certain licenses using Data Loader. For example, you can migrate users between the Customer Community Member and Customer Community Login licenses. Before moving a user to another license, set up a profile for the new license type you are moving the user to.

Upgrade Experience Cloud User Licenses

Upgrading an Experience Cloud user license allows you to give them access to more data within your site. With the right combination of permissions via the user's new license, profile, role, and permission sets, you can preserve the user's record and Chatter history.

Note: Community licenses are used to access Experience Cloud sites.

Before you upgrade a user's license, review which user licenses can be upgraded.

1. From Setup, enter Users in the Quick Find box, then select **Users**.
2. Click **Edit** next to the user you want to upgrade.
3. Select the new license, profile, and role for the user.
4. Optionally, specify a new profile and role.

   Note: If the account the user belongs to has no roles, we create one behind the scenes and assign the lowest role that exists in the hierarchy. If the account does have roles, you must choose one and assign the lowest role that exists in the hierarchy.

5. Save your changes.

SEE ALSO:

Experience Cloud User Licenses

Experience Cloud Licenses Eligible for Upgrades

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Applies to: LWR, Aura, and Visualforce sites

USER PERMISSIONS

To create or edit customer users:

- Manage External Users

  OR

  Manage Customer Users

To create, edit, and delete profiles:

- "Manage Profiles and Permission Sets"

To log in as a partner or customer user:

- Manage External Users

  OR

  Manage Customer Users

  Important: The Manage Customer Users permission is on by default for standard users.

  AND

  Edit on Accounts

To allow portal users to upgrade to Partner or Customer licenses:

- Allow LitePortalUser Upgrade

Migrate Community Users Between Licenses

You can move community users between certain licenses using Data Loader. For example, you can migrate users between the Customer Community Member and Customer Community Login licenses. Before moving a user to another license, set up a profile for the new license type you are moving the user to.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Migrating users to different licenses applies to the following scenarios.

- Between the Customer or Partner Community and Customer Community Login or Partner Community Login licenses
- Between the Customer Portal or Partner Portal and Customer Community or Partner Community licenses

  Note: Making this change results in admin work and requires the creation of a new user record.

- Between the Customer Community and Customer Community Plus licenses

  Note: Make sure that you want to give Customer Community users the more advanced sharing options available to Customer Community Plus users.

Step 1: Export the User Report

1. Log in to Data Loader.
2. Click **Export**.
3. Click **Next**.
4. Select the **User (User)** object.
5. For the extraction target, enter *users.csv*.
6. Click **Next**.
7. Select the query fields **Id** and **ProfileId**.
   a. For Fields, select **IsActive**.
   b. For Operator, enter *equals*.
   c. For Value, enter *true*.
   d. Click **Add Condition**.
8. Add another condition.
   a. For Fields, select **AccountId**.
   b. For Operator, enter *not equals*.
   c. Leave Value blank.
   d. Click **Add Condition**.
9. The generated query is `Select Id, ProfileId FROM User WHERE IsActive = true AND AccountId != 'null'`.

   Note: You can copy and paste the query from this step.

10. Click **Finish**.
11. Click **Yes**.

Step 2: Query Permission Set IDs

1. In Data Loader, click **Export**.
2. Click **Next**.
3. Select **Show all Salesforce Objects**.
4. Select the **Permission Set (PermissionSet)** object.
5. For the extraction target, enter *`permissionsets.csv`*.
6. Click **Next**.
7. Choose the query fields **Label** and **Id**.
8. The generated query is `SELECT Label,Id FROM PermissionSet`.

   Note: You can copy and paste the query from this step.

9. Click **Extract**.
10. Click **OK**.

Step 3: Query the Permission Set Assignments

1. In Data Loader, click **Export**.
2. Click **Next**.
3. Select **Show all Salesforce Objects**.
4. Click **Next**.
5. Select the **Permission Set Assignments (PermissionSetAssignment)** object.
6. For the extraction target, enter *`permissionsetassignment.csv`*.
7. Click **Next**.
8. Copy the following query from this Help topic and paste it into the generated query box: `SELECT AssigneeId,Id,PermissionSetId FROM PermissionSetAssignment WHERE Assignee.UserType IN ( 'PowerPartner','PowerCustomerSuccess','CspLitePortal')`.

   Note: PowerPartner is the Partner Community license, PowerCustomerSuccess is the Customer Community Plus license, and CspLitePortal is the Customer Community license. Add or remove the licenses based on your query needs.

9. Click **Finish**.
10. Click **Yes**.

Step 4: Query Profile IDs

1. In Data Loader, click **Export**.
2. Click **Next**.
3. Select **Show all Salesforce Objects**.
4. Click **Next**.
5. Select the **Profile (Profile)** object.
6. For the extraction target, enter *`profiles.csv`*.
7. Click **Next**.

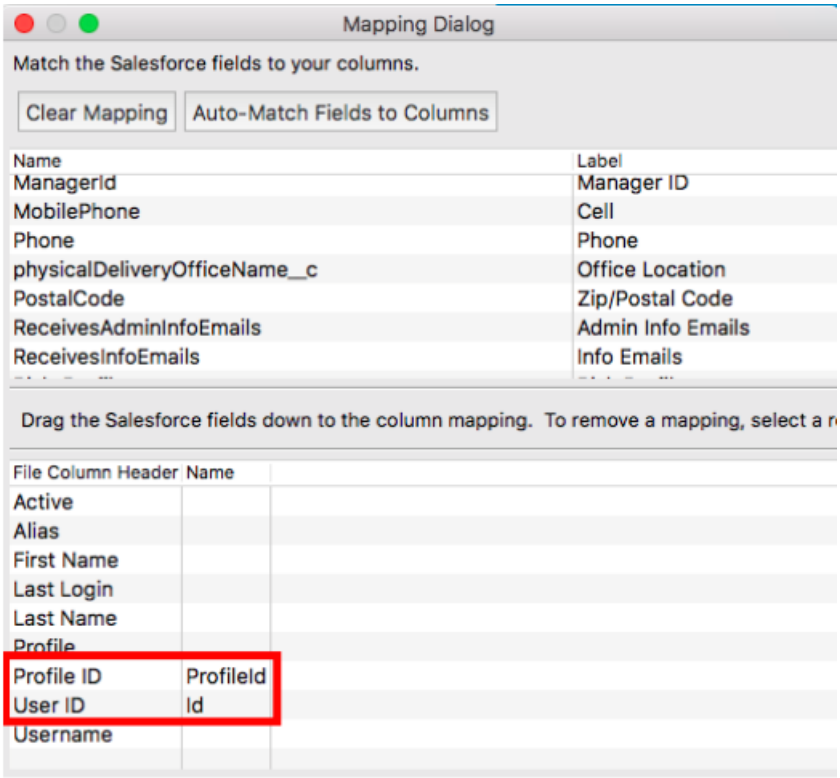
8. Copy the following query into the generated query box: `SELECT Name,UserLicense.Name,Id FROM Profile WHERE UserType IN ( 'PowerPartner','PowerCustomerSuccess','CspLitePortal').`

   Note: PowerPartner is the Partner Community license, PowerCustomerSuccess is the Customer Community Plus license, and CspLitePortal is the Customer Community license. Add or remove the licenses based on your needs.

9. Click **Finish**.
10. Click **Yes**.

Step 5: Update User Profiles

1. Open the `users.csv` file you created.
2. Rename the ProfileID column to *`OldProfileId`*.
3. Add a column named *`ProfileID`*.
4. In the new ProfileID column, add the profile ID that you want to move the user to using the `profiles.csv` file as your guide.
5. Save the `users.csv` file.
6. Open Data Loader, and click **Update**.
7. Select the **User (User)** Salesforce object.
8. Select the **users.csv** file.
9. Click **Next**.
10. Map the ProfileId field to the Profile ID column, and map the Id field to the User ID column.



Warning: This step deletes all permission set assignments for these users. Before performing these updates, make sure that you've saved the permissions to the `permissionsetassignment.csv` file. Otherwise, you lose all history of which permission sets your site users had.

11. Click **Next**.
12. Click **Finish**.

Step 5: Insert Permission Set Assignments

1. Open the `permissionsetassignment.csv` file.
2. Rename the PermissionSetId column to *`OldPermissionSetId`*.
3. Add a column named *`PermissionSetId`*.
4. In the new PermissionSetId column, add the permission set ID that you want to move the user to using the `permissionsetassignment.csv` file as your guide.
5. Save the `permissionsetassignment.csv` file.
6. Open Data Loader, and click **Insert**.
7. Select the **Permission Set Assignment (PermissionSetAssignment)** Salesforce object.
8. Select the **permissionsetassignment.csv** file.
9. Click **Next**.
10. Map the PermissionSetId field to the PermissionSetId column, and map the Id field to the User ID column.
11. Click **Next**.
12. Click **Finish**.

Experience Cloud Site User Account Ownership Limitations

Consider these limitations when assigning ownership of accounts to external users.

- Owners of accounts with users who have role-based licenses, such as Customer Community Plus, Partner Community, or a legacy portal license, can own up to 50,000 accounts.

  Note: A role-based license is a license that allows users be assigned a role in Salesforce.

- The 50,000 accounts can be any combination of person accounts, and business accounts that are enabled for account role optimization (ARO) and have one user per account. Only business accounts with ARO enabled count against this limit.
- If the Salesforce user needs to own more than 50,000 accounts, admins can configure them as person account owner power users.
- Salesforce Customer Support can increase the number of accounts on page 657 if necessary.

SEE ALSO:

Optimize Account Roles to Improve Performance and Scale

Object Reference for the Salesforce Platform: PersonAccountOwnerPowerUser

About High-Volume Community or Site Users

High-volume community or site users in Experience Cloud are limited-access users intended for orgs that have thousands to millions of users.

Unlike other users, high-volume community or site users don't have roles, which eliminates performance issues associated with role hierarchy calculations. High-volume users include the External Apps, Customer Community, High Volume Customer Portal, and Authenticated Website license types.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Characteristics

High volume users:

- Are contacts enabled to access an experience.
- Are assigned to the External Apps, Customer Community, High Volume Customer Portal, or Authenticated Website license.
- Only share the records they own with authenticated Salesforce users in Share Groups.
- Only share the records they own in guest user or criteria-based sharing rules.

Access to Records

High-volume users can access the following types of records, based on specific conditions:

- They can access their own account and contact records, based on implicit sharing.
- They have Read access on the account they belong to.
- They can access a record's parent, and the org-wide sharing setting for that record is Controlled by Parent.
- The org-wide sharing setting for the object is Public Read Only or Public Read/Write.

Limitations

- High-volume users can't manually share records they own or have access to.
- You can't transfer cases from member-based users to high-volume users.
- High-volume users can't own accounts.
- You can't add case teams to cases owned by high-volume users.
- You can't include high-volume users in:
  - Personal groups or public groups.
  - Owner-based sharing rules.
  - Account teams, opportunity teams, or case teams.
  - Salesforce CRM Content libraries.

  These limitations also apply to records owned by high-volume users.
- You can't assign high-volume users to territories.

Share Personal Contact Information Within Experience Cloud Sites

Users can specify which information from their profile is visible to external users, such as customers and partners, and guests viewing publicly accessible pages that don't require login.

When interacting with other Experience Cloud site members, it's important to balance being visible and accessible with protecting your personal contact information. You likely don't want to show your job title, phone numbers, and other contact details outside of your internal organization. Additionally, your customers and partners likely don't want other customers and partners viewing all their contact information.

Use either the user interface or API to control visibility. You can choose to expose fields to employees only, members of the site from outside your company, or guest users who aren't required to log in. Some fields are always visible to everyone accessing the site. Some fields allow up to three levels of visibility, while others allow fewer. In the API, setting a field to `true` on the User object makes it visible to the type of user indicated in the field name (external or guest users).

- Employees—Only members from the internal organization can view.
- External—Members from the internal organization and external members, such as customers and partners, can view. External users are those accessing Experience Cloud sites with community or legacy portal licenses.
- Public—Anyone can view, including guest users viewing publicly accessible pages that don't require login. Guest users can access public pages in sites via the Guest User license associated with each Experience Cloud site.

Consider these tips about the visibility of your contact information.

- Your chosen settings apply to every site you're a member of.
- When a user is restricted from viewing a contact information field, there are differences in what's displayed in the user interface versus the API.
  - In the user interface, the restricted field is hidden from your profile everywhere that it usually displays in a site. If your organization displays your profile information on custom Visualforce pages, the field still displays, but with the value `#N/A`.
  - In the API, a field set to `false` returns the value `#N/A`.
- Other partners and customers in the site can't search information in hidden fields on a profile. But users in the company's internal organization can search this type of information.

Note: This setting isn't enforced in Apex, even with security features such as the WITH SECURITY_ENFORCED clause or the stripInaccessible method. To hide specific fields on the User object in Apex, use the sample code outlined in Comply with a User's Personal Information Visibility Settings.

Default Visibility Settings for Contact Information

This table summarizes the default visibility settings for contact information and your options for restricting visibility.

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
First Name Last Name Nickname About Me	Public	Go to *Your Name* > **Edit Contact Info**, then click **About**	Everyone sees these fields unless your administrator enables nickname display or creates a custom page that displays this information. If your administrator has enabled nickname display, your nickname displays	N/A

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
			in place of your first and last names in most locations.	

Title	External	Go to *Your Name* > **Edit Contact Info**, then click **About**	Employees, external, or public	`UserPreferencesShowTitleToExternalUsers`
				`UserPreferencesShowTitleToGuestUsers`
				When the guest user preference is set to `true`, the job title field is visible to external members even if the external member preference is set to `false`.

Profile photo	External. Users without access see the stock photo.	On your profile page, click **Update** under your photo (or **Add Photo** if you haven't added a photo yet), then select `Show in sites with publicly accessible pages`	External or public	`UserPreferencesShowProfilePicToGuestUsers`

City
Country
Email
Fax
Mobile Phone
State
Street Address
Work Phone
Zip/Postal Code
	Employees	Go to *Your Name* > **Edit Contact Info**, then click **Contact**	Employees, external, or public	For each pair of preferences controlling the visibility of a field, when the guest user preference is set to `true`, the field is visible to external members even if the external member preference is set to `false`.
				`UserPreferencesShowCityToExternalUsers`
				`UserPreferencesShowCityToGuestUsers`
				`UserPreferencesShowCountryToExternalUsers`
				`UserPreferencesShowCountryToGuestUsers`
				`UserPreferencesShowEmailToExternalUsers`
				`UserPreferencesShowEmailToGuestUsers`
				`UserPreferencesShowFaxToExternalUsers`
				`UserPreferencesShowFaxToGuestUsers`
				`UserPreferencesShowManagerToExternalUsers`
				`UserPreferencesShowManagerToGuestUsers`
				`UserPreferencesShowMobilePhoneToExternalUsers`
				`UserPreferencesShowMobilePhoneToGuestUsers`
				`UserPreferencesShowPostalCodeToExternalUsers`
				`UserPreferencesShowPostalCodeToGuestUsers`

Contact Information	Default Visibility	Where to Set in User Interface	Options for Restricting Visibility	API Controls on User Object
				`UserPreferencesShowStateToExternalUsers`
				`UserPreferencesShowStateToGuestUsers`
				`UserPreferencesShowStreetAddressToExternalUsers`
				`UserPreferencesShowStreetAddressToGuestUsers`
				`UserPreferencesShowWorkPhoneToExternalUsers`
				`UserPreferencesShowWorkPhoneToGuestUsers`

Hide Unneeded Visualforce Pages on Your Experience Cloud Site

To avoid exposing pages that don't reflect your brand or that allow for alternative ways to log in to your site, be aware of these guidelines when configuring Visualforce pages that are part of your Experience Cloud site. Understand the relationship between Experience Cloud sites and Salesforce Sites, their public Visualforce pages, and steps to take for a proper configuration.

Relationship Between Experience Cloud Sites and Salesforce Sites

When you create an Experience Cloud site, Salesforce creates a Salesforce Site. Salesforce Site technology powers some of the underlying features behind Experience Cloud sites.

For example, some security settings are set at the Salesforce Site level. Salesforce Sites also automatically create and exposes a set of default Visualforce pages. Before you set up an Experience Cloud site, review the settings of the associated Salesforce Site. To get the full picture of what is visible after creating an Experience Cloud site, review the Experience Builder pages and the accompanying Site Visualforce pages.

If you already have a live Experience Cloud site, run a check to see which pages are visible. One of the default Visualforce pages is named `SiteLogin`. To check if your site exposes this page, append `/SiteLogin` after your Experience Cloud site domain (without the `/s`).

If your Experience Cloud site URL looks like this:	Try accessing:
`yourcommunity.example.com/`	*`yourcommunity.example.com/SiteLogin`*
`yourcommunity.example.com/s`	*`yourcommunity.example.com/SiteLogin`*
`example.com/yourcommunity`	*`example.com/yourcommunity/SiteLogin`*
`example.com/yourcommunity/s`	*`example.com/yourcommunity/SiteLogin`*

If you see your branded login page or the expected error page for your community, your site seems to be properly configured. However, if you see a default Visualforce page that you didn't expect to see, continue reading to see how you can fix it.

Default Visualforce Pages Exposed by Salesforce Sites

When a Salesforce Site is created, a new set of default metadata is added to your org.

- Visualforce pages, such as *`SiteLogin`*, *`SiteRegister`*, and *`ForgotPassword`*

- Aura components, such as `forgotPassword`, `loginForm`, and `selfRegister`
- Apex classes, such as `MyProfilePageController`, `SiteLoginController`, and `SiteRegisterController`
- Visualforce components, such as `SiteFooter`, `SiteLogin`, and `SiteLogin`
- Static resource (`SiteSamples`)

This metadata is intended as examples and templates that you can reuse to expose custom functionality throughout your site.

For example, if you need a fully personalized login experience, you could reuse and customize the sample code provided in the `SiteLogin` Visualforce page or the `loginForm` Aura component.

Some Visualforce pages are publicly accessible by default.

- `BandwidthExceeded`
- `CommunitiesLanding`
- `CommunitiesLogin`
- `CommunitiesSelfReg`
- `CommunitiesSelfRegConfirm`
- `CommunitiesTemplate`
- `Exception`
- `FileNotFound`
- `ForgotPassword`
- `ForgotPasswordConfirm`
- `InMaintenance`
- `SiteLogin`
- `SiteRegister`
- `SiteRegisterConfirm`
- `UnderConstruction`

To control what is visible through your site, review those pages and classify them into different categories.

- Keep the pages you need and want to expose publicly. For example, you might want to customize the `InMaintenance` page, which is shown when your Experience Cloud site is offline, to reflect your brand.
- Remove the pages that you don't need and shouldn't make publicly accessible. For example, if you don't need a custom login page on your site, you probably don't want to leave the default `SiteLogin` Visualforce page exposed publicly.

Update Public Accessibility Settings for Standard Visualforce Pages of Your Experience Cloud Site
Review the public accessibility settings of your standard Visualforce pages that are associated with your Experience Cloud site, and update them as needed.

Update Public Accessibility Settings for Standard Visualforce Pages of Your Experience Cloud Site

Review the public accessibility settings of your standard Visualforce pages that are associated with your Experience Cloud site, and update them as needed.

If you're performing this review on an Experience Cloud site that is live, assess the impact in a sandbox first before changing anything in production.

1. From Setup, in the Quick Find box, enter `Digital Experiences`, and select **Digital Experiences** > **All Sites**.

2. Next to the site that you want to access, click **Workspaces** > **Administration** > **Pages** > **Go to Force.com**.

   All the pages in the Site Visualforce Pages section are public facing. If your business case calls for all those pages to be public, you can finish your audit here. If not, change the access settings.

3. To edit a page's public access settings, in the Site Visualforce Pages section, click **Edit**. The Enabled Visualforce Pages column lists all the public-facing pages. Move pages in and out of the column to change their public accessibility, and then save.

   If you already use the Experience Builder pages for login and registration, don't enable public access to `SiteLogin`, `ForgotPassword`, `SiteRegister`, or `CommunitiesSelfReg`. However, if your site uses Visualforce pages for login or registration, make sure those pages are publicly exposed.

Check the Visualforce pages every time you create an Experience Cloud site. Have a process in place to apply changes as you implement new sites.

Additional Experience Cloud Site Limitations

Here are a few limitations when using features in Experience Cloud sites.

- Drag-and-drop scheduling using events and calendars is not available in Experience Cloud sites.
- Channel Programs and Market Development Fund object list views and records don't display on Salesforce for iOS.
- Partner users can't create account teams and add members to them.
- Partner users can't edit or delete members of an account shared with them by an internal user.
- The default account teams option is not available for Experience Cloud sites.
- Partner and portal users don't receive emails to notify them of upcoming tasks. Reminder notifications are displayed on the bell icon.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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