

# Using Templates to Build Communities

Salesforce, Spring '16





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# PLAN AHEAD: DELIVER CUSTOMER SERVICE VIA COMMUNITIES

Analyze the goals of your community along with the customization options that come with Communities before you get started.

It helps to make a few key decisions well in advance of setting up your community and customizing it.

- Determine the business requirements that the community must deliver to. What types of users are you creating the community for? You could start by identifying the main use cases you want to support, such as customer support, self-service, or just knowledge sharing. We've created templates that support several different types of self-service communities.
- Estimate the size of the community. This helps you to plan your licensing requirements.
- Do you want the content of your community to be publicly available to guest users without licenses? Do you want to give guest users the ability to create a case and interact with your customer support agents?

After you've decided on the focus and scope of your community, it's time to start building! This guide shows you how to use pre-configured templates and Community Builder to quickly build a community that increases brand loyalty, reduces support costs, and increases customer satisfaction. Templates allow for a quick roll-out of a self-service community, with easy customization using Community Builder. Best of all, the templates don't require programming experience or knowledge of the Force.com platform. Not sure which template to use? Check out the template comparison.

If you're looking for a more customized implementation or if your community isn't focused on the self-service model, you have additional options:

- Use Visualforce to customize the out-of-the-box community tabs and options: Communities comes with a few out-of-the-box branding and theming options. You can use these to set up tabs in your community that use your company's logo and theme. In addition, you can use Visualforce to extensively customize the appearance of the community and leverage all the capabilities of the Force.com platform. This option requires programming capabilities.
- Use Site.com Studio: Site.com provides a visual interface that lets you customize your community and even create custom pages without using templates. Note that access to Site.com functionality is now through Community Builder.

Still unsure which product to choose? Take a look at this table to learn more about each product's features.

Feature	Community Builder	Force.com Sites
Public pages	<b>✓</b>	<b>✓</b>
Community templates (Koa, Kokua, Napili, Aloha)*	<b>✓</b>	
Authenticated pages*	<b>✓</b>	
Visualforce pages		<u>~</u>
Out-of-the-box login, logout, self-registration, and error pages	<b>✓</b>	<u>~</u>
Drag-and-drop environment	<b>✓</b>	
Reusable components	<b>✓</b>	
Pixel-perfect designs	<u>~</u>	<u>~</u>
IP restrictions	<b>✓</b>	<u>~</u>

#### Plan Ahead: Deliver Customer Service via Communities

Feature	Community Builder	Force.com Sites
Access to data, such as cases, leads, and opportunities	<b>✓</b>	~
Ready-made forms	~	
CMS	~	
Programmatic page creation (using Apex, APIs, and controllers)		~
Web applications		~
Analytics, reports, and workflows		~
Full Force.com platform capability		~

<sup>\*</sup>Available in Community Builder for Communities users only.

Refer to the Getting Started with Communities guide for more information on different ways to create a community.

# WHICH COMMUNITY TEMPLATE SHOULD I USE?

Community templates let you quickly and easily build a self-service community that gives customers the same visual and functional experience whether they use a tablet, a mobile device, or their desktop.

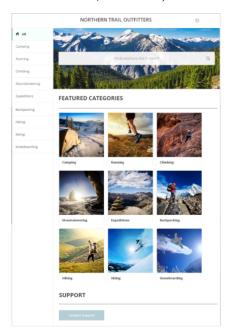
Your customers want an easy way to interact with your company whenever and wherever they are. A self-service community gives your customers an easy way access the information they need when they have questions. With communities built on the Koa and Kokua templates, customers can search for information using knowledge articles and contact support, if necessary. When they're in a community based on the Napili template, they can search for articles as well as ask questions and get crowd-sourced answers from the community. If they still can't find what they're looking for,



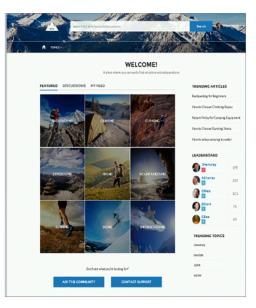
Available in: Salesforce Classic

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

they can contact support without having to log in. The self-service templates let you extend your community to various devices with a consistent user experience every time.







Kokua Koa Napili

A wizard guides you through selecting a template and then walks you through the initial setup for your data categories or topics—depending on which template you're using.

- Kokua is a visually rich self-service template that presents users with knowledge articles organized by data categories. Users can also submit cases to get help from agents.
- Koa is a text-based self-service template that's optimized for mobile devices. It lets users search for and view articles by text representations of data categories, and contact support if they can't find what they're looking for.
- Napili is a powerful support community template that lets your customers post questions to the community and search for and view articles. If they don't find what they're looking for, they can contact a support agent.

Community Builder makes it super easy to customize your community. Simply edit a few of the components to include information about your community, add a few images to extend your branding, and you're ready to go—without any coding! Additionally, if you

want a more custom experience, you can create custom pages, add components to pages, use custom Lightning components, and expose additional Salesforce objects.

Communities are automatically displayed in a logged-in user's profile language, so you don't need to create and manage a separate community for each language. With Community Builder, you can extend the support for Guest users in communities so that if their language isn't supported, they can choose one from a language picker on each community page. And because all languages are maintained within the community, you don't need to create and manage a separate community for each language.

# Compare Features Available in the Community Templates

Thinking about using a template to build your community? There are major differences between the features available in each community template. Before you decide on which template to use, compare them.

# Feature Comparison

	Koa	Kokua	Napili	Salesforce Tabs + Visualforce
All Salesforce Objects				<u>~</u>
Accounts			~	~
Campaigns			~	~
Cases	~	~	~	~
Community Builder	~	~	~	
Community Discussions			~	~
Contacts			~	~
Custom Objects			~	~
Customizations using Lightning Components	<b>▽</b>	<b>▽</b>	<b>▽</b>	
Customizations using Visualforce				~
Salesforce Knowledge	Required	Required	Recommended	Recommended
Knowledgeable People			~	~

# EDITIONS

Available in: Salesforce Classic

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

	Koa	Kokua	Napili	Salesforce Tabs + Visualforce
Leads			~	~
Notes			~	~
Opportunities			~	~
Optimized for Mobile	~	~	~	~
Orders				~
Question-to-Case			~	
Recommendations			~	
Reputation			~	
Topics			~	~
Trending Articles	<b>✓</b>	~	~	

# Objects Supported in the Napili Template

Check out the list of all objects supported by the Napili template.

# Objects Supported in Napili

- Account
- Campaign
- CampaignMember
- Case
- CollaborationGroup
- Contact
- Custom Objects
- Event
- Lead
- Note
- Opportunity
- OpportunityContactRole
- OpportunityLineItem
- OpportunityTeamMember
- ProcessInstanceHistory
- ProcessInstanceStep
- ProcessInstanceWorkitem
- Task

# EDITIONS

Available in: Salesforce Classic

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

User

# Napili Template Community Setup Checklist

Building a community 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 a community using the Napili template.

Have you considered everything on these lists?

#### EDITIONS

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# 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 Salesforce Communities. 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, etc.).
Enable the Global Header for Communities for the system administrator profile, and any other profiles accessing your community from the internal org.
Enable any Service Cloud features you plan to use in the community, such as Salesforce Knowledge.
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 Community:
In your internal Salesforce org:
Add members to your community.
Configure the Guest User Profile (access using Community Management or the Community Builder):
Give read and create permissions for the case object.
If using Salesforce Knowledge, give guests access to your data categories.
In Community Management:
Set up payingational topics and subtopics and associate articles to each topic

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Nupili	TCHIPIC		11 1 1 0 1 111 9	Jeiop	CHECKIIS

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 Community 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 Community
Set up an internal Chatter group for feedback, and invite people to take a test drive while the community is still in preview mode.
Incorporate their feedback, and then publish your community.
Seed the community with some initial content: welcome posts, groups, and relevant or fun articles

# COMMUNITY TEMPLATES FOR SELF-SERVICE LIMITATIONS

The following limitations apply to Community Templates for Self-Service:

- Lookup fields aren't supported for custom objects or in template-based communities created before Spring '16. The Create New option for lookups isn't supported for the Napili template, and only external users (not quest users) can access asset lookup fields.
- Article smart links (links from one article to another) aren't supported.
- In multilingual communities, the login page for the community appears in the default language for the community. To create login pages in other languages, use custom Visualforce pages.
- Only one category group can be active at a time with a maximum of five hierarchy levels in each group for templates that use data categories, like Koa and Kokua.
- 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 community is blocked from Google web traffic,
  consider requiring users to log in to post to the community.
- Even if Allow members to flag content is enabled in your community, you won't see the **Flagged Files** node in Community Management.

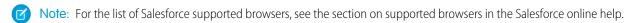
#### **Browser Limitations**

- Mobile devices using the BlackBerry or Microsoft Windows operating systems aren't supported.
- Internet Explorer versions before 11 aren't supported. We've created a page that automatically lets your users know that they need to 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 it in the header script section of the Site.com page. The file should contain the following code:

```
if (window.attachEvent && !window.addEventListener) {
  window.location = '<your redirect page>';
}
```

Only the latest versions of Chrome, Firefox, and Safari (on Mac OS) are supported.



# CREATING COMMUNITIES WITH TEMPLATES

# Prerequisites to Using Community Templates for Self-Service

USER PERMISSIONS	
To create, customize, or publish a community:	"Create and Manage Communities"
To enable Communities:	"Customize Application"
To create article types and article actions:	"Manage Salesforce Knowledge"
To create accounts:	"Create" on Accounts
To create or edit internal users:	"Manage Users"
To create or edit guest and other external users:	"Manage External Users"
To upload branding images and email templates:	"Create" on Documents
To create contacts:	"Create" on Contacts
To create data categories:	"Manage Data Categories"

EDITIONS
Available in: Salesforce Classic
Available in: <b>Enterprise</b> , <b>Performance</b> , <b>Unlimited</b> ,
and <b>Developer</b> Editions

Before you create your self-service community, you'll need to complete a few setup tasks.

This guide is designed to use with Salesforce Developer, Enterprise, Unlimited, or Performance Editions. Contact Salesforce to ensure that you that have the correct user and feature licenses. You also need permission to set up and administer Cases, Communities, and Salesforce Knowledge. Refer to the *Getting Started with Communities* guide for more information on licenses and editions that support Communities.

Communities supports all internal and portal licenses including existing Customer Portal, Authenticated Website, and partner portal licenses. Communities doesn't support the Chatter External license.



**Note**: As you're following this guide, if you can't access a feature, make sure that you've got the correct licenses and permissions to administer that feature.

If you're creating an entirely new community or you're adding self-service functionality to your existing community, follow these steps:

- Enable Salesforce Communities in your organization and create a community. For detailed instructions on setting up a community, see the *Getting Started with Communities* guide.
- Set up Salesforce Knowledge and create and deploy the article types. If you're setting up the Napili template to use cases and discussions only, you can skip setting up Salesforce Knowledge.
- Set up data categories to organize and control access to your articles.
- Upload the images you'll use to represent data categories and to extend your company's branding if you're using a template based on data categories.
- If the template you're configuring uses topics to display articles and questions, create topics and associate them with data categories.

- Create a case publisher action that creates cases for authenticated users. To learn about actions, see "Actions Overview" in the Salesforce online help.
- Configure the guest user profile to specify permissions and define access for your community.
- Create a case publisher action that creates cases for unauthenticated users, if you want to let guest users create cases.
- Create a case assignment rule so that cases created from your community are assigned to your support agents. For more information on case assignment rules, see the Salesforce Help.
- Optionally, to let guest users create a case without signing in, enable Web-to-Case along with a case publisher action for guest users.

# **Switch On Salesforce Communities**

The first step in setting up your self-service community is to flip the switch to enable Salesforce Communities.

- Note: Once you enable Communities, you can't turn it off.
- 1. From Setup, enter Communities Settings in the Quick Find box, then select Communities Settings.
- 2. Select Enable Communities.
- **3.** Next, enter a unique value to be used as your domain name and click **Check Availability** to make sure it's not already being used by someone else.
  - It's a good idea to use something recognizable to your users, such as your company name. Although the domain name is the same for all communities, you create a unique URL for each community during the creation process.
  - Note: Keep in mind that you can't change the domain name after you save it. You'll have to call Salesforce to change it.
- 4. Click Save, and make sure you click OK on the confirmation message page to enable the community.

For more information on setting up communities, see Getting Started with Salesforce Communities.

# Create Your Community Using a Preconfigured Template

Create a community and select a template to apply to your community. Define your template and community properties in one place, then use Community Builder to finish designing and organizing your community.

 From Setup, enter All Communities in the Quick Find box, then select All Communities, and then click New Community.

The Community Creation wizard appears with different template options for you to choose from.

**2.** Hover over a template to see more information about it.

#### Kokua

A visually rich, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

#### Koa

A text-based, responsive self-service template that lets users search for and view articles or contact support if they can't find what they're looking for. Supports Knowledge and Cases.

#### Napili

A powerful, responsive self-service template that lets users post questions to the community, search for and view articles, and contact support agents by creating cases. Supports Knowledge, Cases, and Questions & Answers.

#### Aloha

A configurable App Launcher template that lets users quickly find applications and access them using single sign-on authentication.

#### Salesforce Tabs + Visualforce

Standard Salesforce structure and tabs that you can customize using Visualforce. Supports most standard objects, custom objects and Salesforce 1. Keep in mind that the Salesforce Tabs + Visualforce template is based on the standard Salesforce tab structure and doesn't work with Community Builder.

- 3. Hover over the template you want to use, and then click **Choose**.
- 4. If you selected Koa or Kokua, specify the categories and Company Name for your template.

#### **Category Group Name**

This is the unique name of the data category group that contains the data categories for your site. The name reflects the hierarchy of categories that you've set up for your community and is used throughout the site to organize articles.

#### **Top Level Category**

This is the highest-level category that you want to display. Only the children of this category appear in the community. You can have several nested layers of categories above this category, but the page will show this category as the parent and show its subcategories as children.

#### **Company Name**

This is the name of your company as you want it to appear in the header.

- 5. Click Next.
- **6.** Enter the name and optional URL for your community.

#### **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

To create, customize, or publish a community:

"Create and Manage Communities"

To create article types and article actions:

"Manage Salesforce Knowledge"

To create data categories:

 "Manage Data Categories" Selecting this option automatically updates your community's settings with the URL for the custom pages you create in this step. You can override this login page with another login page in your community's settings. For detailed instructions on creating custom login, logout, and self-registration pages for your community, see *Getting Started with Communities*.

#### 7. Click Create Community.

The community is created in preview status.

8. On the confirmation page, click Go to Community Management to customize your community.

If you selected the Napili template, use Community Management to set the topics that appear in the navigation menu or that feature prominently on your home page.

Use Community Management to configure community settings such as your default login and registration pages, header and footer, and email templates.

To try out a different template, go back to Community Management and change your template selection. But don't worry—you can always switch back to the first template you chose. To switch back, set the home page back to its original URL in Site Configuration in Site.com Studio.

Important: When you create a community, your profile is automatically added to the list of profiles that have access. As a result, all users in your organization with this profile can log in to the community once it's Active. If you don't want all users with your profile to have access, you can remove the profile and give yourself access through a different profile or permission set.

#### **Enable the Global Header for Communities**

When Communities is enabled, the global header allows you to easily switch between your communities and your internal organization.

Communities must be enabled in your organization to use the global header.



The View Global Header permission is disabled by default for all standard profiles. To view the global header, users must be assigned 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.

- 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.

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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 internal organization and any communities they have access to.

The Your Name menu on the right side contains links to edit contact information and log out. For internal users, it also contains a link to Help & Training and may also contain links to Setup and other tools depending on user permissions and enabled features. If your organization is using Lightning Experience, users with the appropriate permission can switch between Salesforce Classic and the new interface using the Switcher. Look for the Switch to Lightning Experience link in the Your Name menu. Communities aren't supported in Lightning Experience, so to create, manage, or access communities from the global header, you'll have to switch back to Salesforce Classic.

## EDITIONS

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"

When in a community, users with either the Manage Communities or the Create and Set Up Communities permission see a gear icon ( ) they can use to switch to Community Management. Within Community Management, they see an additional menu that they can use to preview the community or access the community settings via Community Builder, Site.com Studio, or Force.com.





Note: Within Community 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 to users who need to switch between your internal organization and communities.

# Access the Community Management Page

# **USER PERMISSIONS**

To access Community Management:

- "Manage Communities" OR "Create and Set Up Communities"
- AND is a member of the community whose Community Management page they're trying to access

To customize administration settings or use Community Builder: "Create and Set Up Communities"

- AND is a member of the community whose Community Management page they're trying to access

Community administrators and managers use Community Management to monitor community activity, and set up other important management features.

To access the Community Management page, you must be logged in to the community.

- **1.** From within the community, click in the global header. Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.
- **2.** Choose the part of the community you want to manage:
  - Preview the community or access your community's settings in the Community Builder, Force.com, or Site.com Studio from the Community Management menu in the global header.
  - In **Insights**, you can view Insights reports and take action on activity in your community.
  - In **Dashboards**, you can view community dashboards and reports.
  - In **Moderation**, you can set up moderation rules and monitor flagged feed items.
  - In **Topics**, you can manage navigational and featured topics.
  - In **Recommendations**, you can set up custom recommendations to appear in your community.
  - In **Reputation**, you can set up reputation levels and points.
  - In **Administration**, you can customize your community properties, such as name, description, URL, status, and template. You can also update your community settings, such as members, tabs, branding, login and registration, and emails.



(1) Important: The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration** > **Preferences** and enable Show all settings in Community Management.

# Organize Self-Service Communities with Topics

Topics are a fantastic way to organize content in any community. Community members can add topics to posts and discussions, and structure content organically. When you set up a self-service community with the Napili template, you can use the Community Management page to guickly guide members to key navigational and featured topics.

On the Community Management page, you choose navigational topics and subtopics to provide a consistent map of your community, and featured topics to highlight current, popular conversations. In the community itself, member-created topics let users organize information for each other, creating a personalized experience that boosts community engagement.

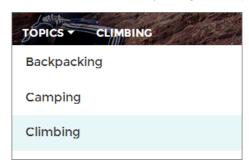
In a self-service community, the Napili template specifies the layout and design of navigational, featured, and member-created topics. Below are visual examples of each type in an active community.



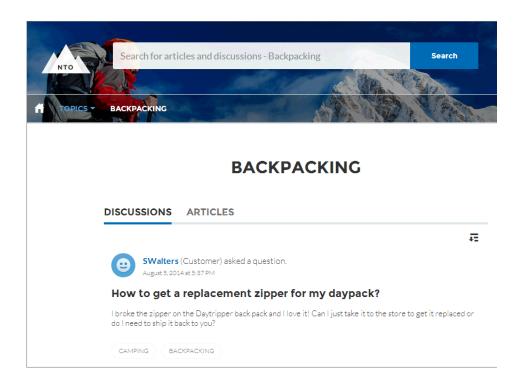
Tip: To add navigational and featured topics to other types of communities, Apex developers can use the ConnectApi.ManagedTopics class in a Visualforce page.

# Navigational topics

On every page of a self-service community, navigational topics are available from the Topics menu at upper left. Community members can also see all the community's navigational topics and subtopics in one place in the topic catalog.

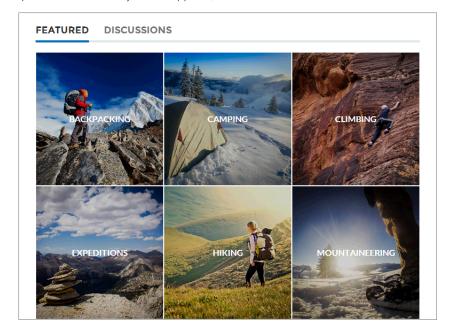


When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



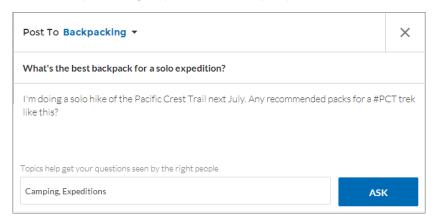
# Featured topics

Featured topics are accessible from the body of your community 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 Community Builder appears.)



# Member-created topics

When posting questions, community members create topics by using hashtags in body text, or typing in the topic suggestions box below. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for community users.)



If any suggested topics are poor matches for the post, members can simply click to delete them.

1 Tip: Member-created topics can be accessed via search, or highlighted as featured topics on the Community Management page.

#### **Set Up Navigational Topics**

Structure your community's content and help your users find what they need with navigational topics. If your organization 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 the Chatter REST API.)

- 1. From Setup, enter *Topics for Objects* in the Quick Find box, then select **Topics for Objects**, and enable topics for all the article types you want to include.
  - Note: Enabling topics disables public tags on articles. Personal tags aren't affected.
- **2.** From within the community, click in the global header.

  Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.
- 3. Click 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 drop down menu (under Show the 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 organization 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.
  - (1) Important: This process adds only current articles to a topic. To add new articles, return to Community Management and repeat the step above.
- **6.** Hover over a topic name, and click **1.** 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.)
- 7. Repeat steps 4-6 to create several navigational topics for your community. Then click **Save**.
- **8.** Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization.

The following is the maximum number of navigational topics and subtopics you can have in a Napili community template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

#### **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

To access the Community Management page:

"Manage Communities"
 OR

"Create and Set Up Communities"

**AND** 

Is a member of the community whose Community Management page they're trying to access.

To set up navigational topics:

"Create Topics"

AND

"Edit Topics"

To add articles to topics:

"View Data Categories"

AND

"Read" on related article types

- 1 Tip: To quickly edit existing navigational topics, simply hover over a topic name, and do any of following:
- 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 ...

## **Set Up Featured Topics**

Featured topics highlight current, popular community conversations. Change them regularly to keep community members up-to-date and engaged.

- **1.** From the community, click in the global header.
- 2. Click Topics > Featured Topics.
- **3.** From the pop-up menu at right, select a navigational or member-created topic you want to feature. Then click **Add**.
  - Tip: Using the Chatter REST API, you can create unique featured topics, separate from navigational or member-created ones.
- **4.** Hover over a topic name, and click **1.** Then click **Upload thumbnail image**, and select an image that represents the featured topic on the community home page.
  - (Thumbnail images are scaled to 250 x 250 pixels. To prevent distortion, create image files with those dimensions.)
- **5.** Repeat steps 3-4 to create several featured topics for your community, up to a maximum of 25. Then click **Save**.

To quickly edit existing featured topics, simply hover over a topic name, and do any of following:

- To move topics up or down, click the arrows at left.
- To rename or delete topics, or change their thumbnail images, click a.

#### **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

To access the Community Management page:

- "Manage Communities"
   OR
  - "Create and Set Up Communities"

**AND** 

Is a member of the community whose Community Management page they're trying to access.

To set up featured topics:

"Edit Topics"

# **Manage Topics in Communities**

#### **USER PERMISSIONS**

To access the Community Management page:	"Manage Communities"  OR  "Create and Set Up Communities"
To create topics:	"Create Topics"
To merge topics:	"Merge Topics"
To delete topics:	"Delete Topics"
To rename topics:	"Edit Topics"

#### **EDITIONS**

Available in: Salesforce Classic

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

As the number of topics in a community grows, curate them to improve usability. In Community Management, you can create, merge, rename, and delete topics in one convenient location.

- **1.** From the community, click in the global header.
- 2. At left, click **Topics** > **Topic Management**.
- **3.** Do any of the following:
  - To create a topic (often with a plan to merge existing ones into it), click **New**.
  - To combine existing 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.
  - To rename or delete a topic, click ...

    If you don't see a topic you want to rename or delete, either search for it or click **Show More** below the topic list.
- Tip: For international communities, you can translate names of navigational and featured topics. From Setup, search for and select Translate. Then select the Managed Topic setup component, and expand a community to see its master topic names.
- Note: Topics are only supported on English articles.

#### **Customize Communities Preferences**

Enable or disable content flagging, reputation, public access, and knowledgeable people in your community.

To use these settings, first enable Chatter in your organization.

- 1. Access Community Management in either of the following ways.
  - From the community, click in the global header.
  - From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**. Then click **Manage** next to the community name.
- 2. Click Administration > Preferences.
- **3.** Change the following settings, as appropriate:

#### General

- Display nicknames instead of full names in your community. Enabling nickname display in your community allows more privacy and protects member identities. This is especially helpful in a public community where unregistered visitors can access member profiles.
- Enable access to public content in your community so that guest users can access it without logging in. Allowing this access is a way to boost adoption and helps customers easily find information they need without having to log in, register, or contact your company directly.
- Use custom Visualforce error pages, if you want authenticated users to see your custom branded Visualforce error pages.
- Show all settings available in Community Management that are hidden by default based on how you set up your community. Enabling this setting overrides the dynamic navigation provided in Community Management.

#### **Community Management**

- Allow members to flag posts, comments, or files for moderation within your community. Members may want to flag items that contain inappropriate language or sensitive information.
- Enable Reputation to allow community managers to set up a point system that rewards users who participate in the community. Administrators set up corresponding reputation levels that users see on their profile.

• Enable knowledgeable people so 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 files uploaded to the community.
- Specify the types of files that can be uploaded in the community.

# Use Profiles to Manage Community Membership

Profiles help manage community membership and access to information. You'll need to create a profile for both guest and authenticated users.

With profiles, you can grant or remove access for group of users simply by changing the access of the profile or permission set. Once you add a profile to the community, all users assigned to it become members of the community—so it makes adding members simple!



Note: Existing communities that still use High Volume Customer Portal profiles can still use this profile to manage users.

- 1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles**.
- 2. In the Profiles list page, click **New Profile**, then select the Customer Community User profile.
- 3. Type Self-Service Community User as the new profile name.
- 4. Click Edit.
- 5. Accept the default values in the Administrative Permissions, General User Permissions, and Standard User Permissions sections.
- 6. In the General User Permissions section accept the default settings and select Assign Topics and Create Topics.
- 7. In the Standard Object Permissions section accept the default settings and select Read, Create, and Edit for Cases.
- **8.** If you're enabling knowledge articles in your community, in the Article Type Permissions section, make sure that Read is selected for the article types you've created.
  - Customers should be able to read articles, but not make any changes to them.
- 9. Click Save.

# Configure the Guest User Profile for Unauthenticated Users

A guest user profile is designed for public users who access your community. Before you publish your community, create a guest user profile so that your customers can view and interact with your community before they sign in.

When Communities is enabled, guest users have access to public pages in your communities. However, to allow guest users to view or submit data to a standard or custom object, modify the object's permission in the community's guest user profile. Each community has a separate Guest User license, so you can control access to objects (including lookup fields) on a per-community basis.



**Note**: You must set field-level security if you use your guest user license for case creation.

- 1. From Community Builder, click the Settings icon 📮 , and select General.
- 2. Click the link for the profile name under Guest User Profile.
- 3. Click Edit.
- **4.** Scroll down to the Standard Object Permissions section.
- 5. On the Cases object, select Read and Create.

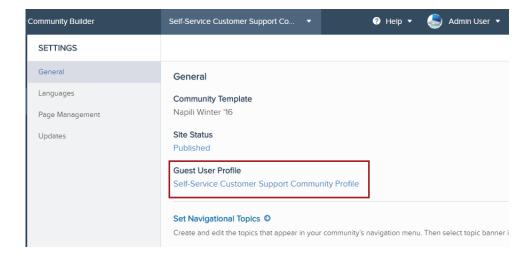


**Note:** Are you using more than one case record type in your org? If so, don't use the Master Record Type as the Assigned Record Type or the Default Record Type on the guest user profile.

- 6. Scroll down to Article Type Permissions and select Read for the articles you'll display in your community.
- 7. Scroll down to Category Group Visibility Settings.
- 8. Click Edit next to the Category Group for your community.
- **9.** Select a visibility setting.

Visibility Setting	Description
All Categories	Users can see all categories in the category group. This option is only available for the topmost role in the role hierarchy. When you create a category group, its visibility is defaulted to All Categories.
None	Users can't see any categories in the category group.
Custom	Users can see your custom selection of categories. For roles, you can choose from the categories that are visible to the parent role. If the parent role's visibility changes to be less than its child's visibility, the child role's category visibility is reset to its parent's category visibility.
	To select categories, double-click the category in the Available Categories box. Alternatively, select a category and then click <b>Add</b> . Selecting a category implicitly includes its child and parent categories as well. Categories that are grayed out are not available for selection because their parent has already been selected.
	Note: If you are customizing a role, permission set, or profile that was set to All Categories, remove All from the Selected Categories box and then select specific categories.

**Example:** Sample Guest User Profile link in Community Builder



# Import Image Files to the Assets Folder for Koa and Kokua

Adding images to your community extends your branding and gives your users a visual representation of your community's data categories.

Let's say that your community has an All Recipes data category group with categories for Desserts, Main Dishes, Salads, and so on. To add visual interest, you want to display images that represent each of the categories in the Featured Categories component. Before you begin setting up your community, you need to upload image files to the Assets folder on the Overview tab of Site.com Studio.

Each category can have one image associated with it, which appears in a square frame on the category page or a rectangular frame in the Search bar. Use the convention <code><datacategoryname>-<size>.<filetype> to name the image files, so that the system associates the correct image file with the data category of the same name. The file names for your images must match exactly the name of each data category and must include a notation for square images (s) or wide images (w). So, for a data category with the name <code>Desserts</code>, the corresponding square image file should be named <code>Desserts-s.jpg</code>.</code>

After you've uploaded your images to Site.com's Assets page, you can enter a relative URL and use the expression {!Global.PathPrefix}/{!DataCategory.Name}.jpg in a component's Category Image URL field. The expression maps directly to <datacategoryname>-<size> and displays images for the data categories in the order in which they are listed in the data category group. If you upload to sub-folders in the Assets page, you'll need to use the expression:

```
{!Global.PathPrefix}/<Name of the Subfolder>/{!DataCategory.Name}.jpg
```

For example, if you upload images to a sub-folder on the Assets page, use the expression:

```
{!Global.PathPrefix}/assets/{!DataCategory.Name}.jpg
```

To use images from another source, enter <a href="http://cother source">http://cother source</a>/{!DataCategory.Name}.jpg.

Salesforce recommends .jpg format for image files and .png format for graphic art. To increase the speed at which pages load, use progressive JPEG compression whenever possible.

You can add images to the following components:

#### **Featured Categories**

This component displays a title and a square image for each category within a group of data categories. The recommended file size is up to 400 KB. The recommended frame size for this image file is 480 x 480 pixels.

When you create the images, be sure to name them according to the following convention:

<datacategoryname>-s.jpg

#### **Featured Search**

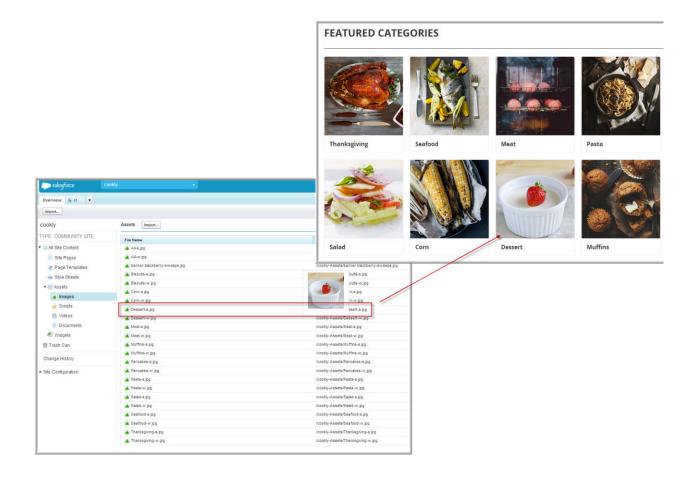
This component displays an image in the search bar for the selected data category. The recommended file size is up to 1 MB. The recommended frame size for this image is between 1280 – 2560 pixels wide by 175 pixels high. Images with an aspect ratio of 3:1 (wide and relatively short) will provide the best results.

When you create the images, be sure to name them according to the following convention:

<datacategoryname>-w.jpg



Note: The components that show the user's profile image don't require that you upload any images.



# OTHER SALESFORCE FEATURES FOR YOUR COMMUNITY

# Set Up Salesforce Knowledge

Before you can set up all the great features of Salesforce Knowledge, make sure that you're a Salesforce Knowledge user.

Salesforce Knowledge helps you get the right information to your customers and agents via articles that can be quickly reached from within your community. Whether through video, FAQs, or other formats, knowledge articles provide accurate information to customers when and where they need it.

- 1. From your personal settings, enter *Advanced User Details* in the Quick Find box, then select **Advanced User Details**. No results? Enter *Personal Information* in the Quick Find box, then select **Personal Information**.
- 2. Click Edit.
- 3. Select Knowledge User.
- 4. Click Save.

# Create an Article Type

The first step when setting up Salesforce Knowledge is to create one or more article types. In fact, you can't enable Salesforce Knowledge until you've created at least one article type.

An article's type determines the type of content it contains, its appearance, and who has access to it. When your support agents create an article to provide a solution to an issue, they must choose the type of article that they're creating.

- 1. From Setup, enter Knowledge Article Types in the Quick Find box, then select Knowledge Article Types.
- 2. Click New Article Type.
- **3.** Type a name for the label of the article type.
- **4.** Type the plural name of the object. If you create a tab for this object, this name is used for the tab.
- **5.** Select Starts with a vowel sound, if the article type you're creating starts with a consonant.
- **6.** Type the API name for the article type.
- 7. Add a meaningful description to help you remember the differences between your article types when you're viewing them in a list.
- 8. Select the Deployment Status of **Deployed** to make sure that this article type is available to use right away.
- 9. Click Save.

# **Enable Salesforce Knowledge in Your Community**

Now that we've set up articles that members and agents can use to solve issues and close cases, enable and configure Salesforce Knowledge so that service agents can easily create knowledge articles.

- 1. From Setup, enter *Knowledge Settings* in the Quick Find box, then select **Knowledge Settings**. Confirm that you understand the impact of enabling Salesforce Knowledge and click Enable Salesforce Knowledge and click **OK** in the dialog box.
- 2. To select your general settings, click Edit.

- **a.** To enable agents and internal users to edit articles without going to the Article Management tab, select Allow users to create and edit articles from the Articles tab.
- **b.** To add a Validation Status field to all articles, select Activate Validation Status field.

  This way, agents can attach approved articles to questions instead of ones that haven't gone through an approval process.
- **c.** To allow <iframe> elements in the standard editor to embed multimedia content from Dailymotion, Vimeo, and YouTube, select Allow users to add external multimedia content to HTML in the standard editor.
- **3.** To show article summaries to customers and internal community members in the article list view, select Internal App and Customer.
- **4.** Choose English as the **Default Knowledge Base Language**. Your authors will write most of the articles in this language. We recommend that your default knowledge base language and your organization's language are the same.

#### Mote:

- Current multi-language users can still use Communities. The Salesforce Help provides more details on multi-language organizations.
- To let guest users select a language when they visit your community, add the Language Picker component to any community page.

#### 5. Select Single Language.

- **6.** To let agents create a draft article that is attached to the case, select Allow users to create an article from a case.
- 7. Select the option that lets agents use the standard editor when they create articles. It also lets them add links, formatting, and videos to articles.
- **8.** Select a default article type.
- 9. Optionally, select the options to use profiles to create PDFs on cases and for agents to share articles with public URLs.
- 10. Select the option to Allow agents to create an article from a reply.

This option lets agents turn a helpful answer into an article.

- **a.** Select the default article type.
- **b.** Assign the article to an internal user, so that it can be evaluated for accuracy.

#### 11. Click Save.

- **12.** Optionally, enable thumbs up and thumbs down voting on articles in your community so you can identify helpful articles and ones that need improvement:
  - **a.** In the Page Editor in Community Builder, navigate to the Article Detail page.
  - b. Display component properties by clicking the Article View (Koa and Kokua) or Article Content (Napili) component.
  - c. In the Property Editor, select **Enable Article Voting** and customize the vote prompt and confirmation text if desired.
  - **d.** Publish your changes.

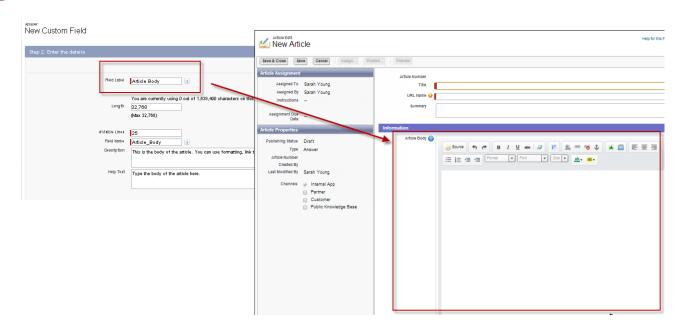
For more information on setting up Salesforce Knowledge, see the *Salesforce Knowledge Implementation Guide* or search the Salesforce Help.

# Enable Formatting, Images, Links, and Videos in Articles

To let authors use formatting and add images, videos, or links to articles, you'll need to add the rich text editor to the article type.

Since the only standard fields provided by default on article types are Article Number, Summary, Title, and URL Name, you'll probably want to add a field where authors can create the body of the article. When you add the rich text editor to an article type, authors can enter text with formatting as well as add images, videos, and links.

- Note: To preserve the responsive design capability of the templates, it's a best practice to avoid manually editing the HTML widths of knowledge articles.
- 1. From Setup, enter Knowledge Article Types in the Quick Find box, then select Knowledge Article Types.
- 2. Click the name of the article type.
- 3. Click **New** in the Fields related list.
- 4. Select Text Area (Rich), and click Next.
- 5. Type Article Body as a field label.
- 6. We'll accept the default values for the Length, Visible Lines, and Field Name.
- 7. Enter any field attributes, such as Description, and click **Next** to continue.
- **8.** Set the field-level security to determine whether the field should be visible and editable or read-only for specific profiles. For example, you may want the field to be visible to everyone, but have the article body be read-only for external community members. That way, external community members can't make changes to articles. In this scenario, you would set the field-level security as follows:
  - a. Select Visible for all of the profiles listed who will be using the community and viewing articles.
  - **b.** Select Read-Only for the profiles of external users and for any other profile that you don't want editing the body of knowledge articles.
- 9. Click **Next** and select the checkbox to add the custom field to the layout.
- 10. Click Save.
- Example:

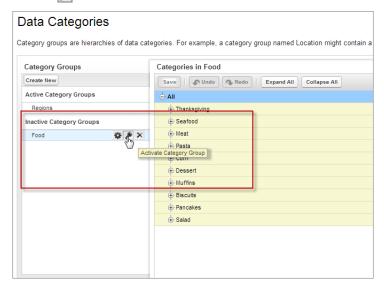


# Create Data Categories to Organize Articles and Discussions

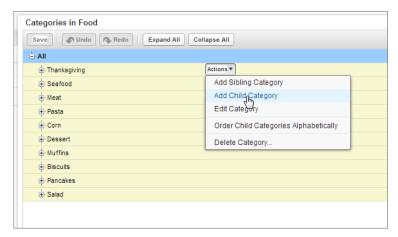
Create data categories to organize articles so that customers can browse articles and find the answers they're looking for.

There's nothing worse than looking for a needle in a haystack. Your customers might come to the community with a question that's already been answered, but if they can't find the article or discussion, they'll leave frustrated. Data categories help to organize articles and discussions so that members can browse the community in an organized way.

- Note: For optimal performance, we suggest that you use no more than 20 data categories in each community.
- 1. From Setup, enter Data Category Setup in the Quick Find box, then select Data Category Setup.
- 2. Click **Create New** to create the data category group.
- 3. Specify the Group Name and enter a description. This name appears as the title of the category drop-down menu for articles and discussions in your community.
- 4. Click Save.
- **5.** Click the category group and hover over All so that you can click **Actions**.
- **6.** Click **Add Child Category**, type a category name, and click **Add**. Repeat this step to add the rest of your categories.
- 7. To activate a category group so it's available to users, move the mouse over the category group name in the Inactive Category Groups and click .



**8.** Hover over the category name, click **Actions**, then select **Add Child Category** and type the new category name in the text box. Click **Add**.



Repeat this step to add all additional categories.

#### 9. Click Save.

Once you've set up data categories, make sure to set the default visibility for the group. For instructions on setting up data category visibility, see the Salesforce Help.

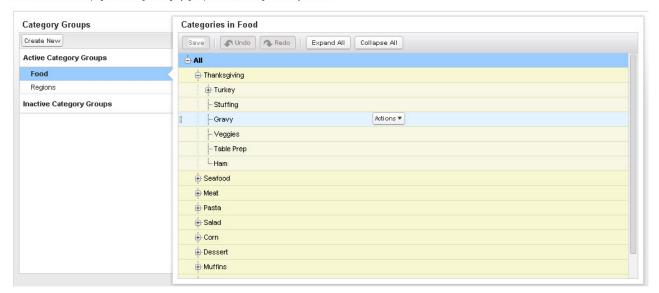
Note: Users must have visibility to the category that is specified as the top-level data category in the properties setting for the component. So if a user has visibility to child data categories but not to the child's top-level data category, the article or discussion isn't visible.

#### Example:

#### **Data Categories**



Category groups are hierarchies of data categories. For example, a category group named Location might contain a geographical hierarchy of continents, countries, regions, and states. Use this page to manage category groups and the categories they contain.



# Indexing Knowledge Articles

You can modify the robots.txt file or submit the sitemap.xml file from your community so that search engines can properly index knowledge articles for your self-service community.

Having direct links to all the knowledge articles on your website is not always feasible, because there might be too many links to display. So, most communities use a search box so that users can find articles. When there aren't direct links to articles, it's impossible for search engines to index them. To help solve this problem, Salesforce creates a file called sitemap.xml that includes the links for the knowledge articles. It's located at the root of the app for your community, for example, /community/s/. The robots.txt file also controls web search engine behaviors. It's located at the root of the domain and is configured through the corresponding Force.com community. You can either modify the robots.txt file to include a path to your sitemap.xml file and include the robots.txt file as part of your community, or you can submit the sitemap.xml file directly to the search engine.



**Example**: Here's an example of a robots.txt file. It doesn't allow any indexing at the / level, allows indexing at the /community/s/ level, and includes the path to the sitemap.xml file.

```
User-agent: *
Disallow: /
Allow: /community/s/
Sitemap: http://www.Your_Site.com/community/s/sitemap.xml
```



**Note**: The Allow directive is not supported by all search engines, although it's supported by Google. You can remove Allow and Disallow to support all browsers.

```
User-agent: *
Sitemap: http://www.Your_Site.com/community/s/sitemap.xml
```

For more information on indexing, see these websites:

- Introduction to Force.com Sites
- Creating a Sitemap File
- http://www.sitemaps.org/
- http://www.robotstxt.org/

# Let Guest Users Create Cases

When you set up Web-to-Case along with a case quick action, guest users can create a case without having to log in as an authenticated user.

To let guest users can create a case, create a case page layout for unauthenticated users so that you can capture and create basic information.



#### Tip:

- Guest users don't have access to contacts, so we recommend that you remove the Contact field from the page layout.
- Guest users don't have access to rich text area (RTA) fields, so we recommend that you exclude RTA fields from the page layout.
- Guest users can't attach files when creating a case.
- 1. From Setup, enter Web-to-Case in the Quick Find box, then select Web-to-Case.
- 2. Select Enable Web-to-Case.
  - Note: When using a self-service template, it's unnecessary to set up the other options on the Web-to-Case Settings page.

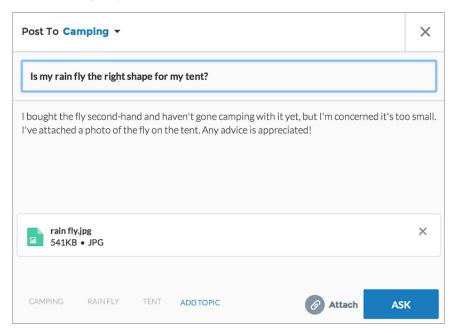
# **Enable Chatter Questions in Your Community**

Chatter Questions helps you promote community 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 communities can answer questions in Chatter just as they would comment on a Chatter post. Users in communities built on the Napili template can also attach files to questions.

To set up Chatter Questions in your community, simply add the Question action to the global publisher layout. In organizations created after Summer '14, the Question action is automatically added, but we recommend dragging it to the far left to increase its visibility.

Ø

**Note**: Chatter Questions is not available in communities built on the Koa and Kokua community templates.



#### **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.

# Set Up Question-to-Case in Your Community

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 all communities where Chatter Questions is enabled.

Users with the "Moderate Chatter" user permission can create cases from questions directly in the feed. You can also set up processes—similar to workflow rules—in the Lightning Process 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**

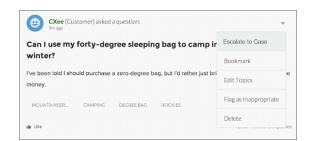
Available in: Salesforce Classic

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

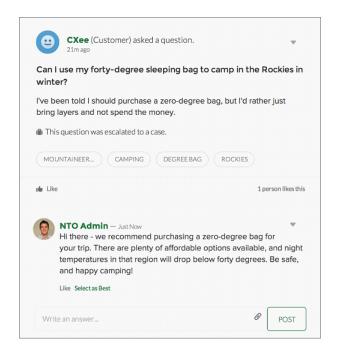
### **USER PERMISSIONS**

To set up Question-to-Case in communities:

"Customize Application"



When agents find a solution, they can respond to questions directly from the case, 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 community, or only to the customer who asked the question.



#### To set up Question-to-Case:

- **1.** Enable Question-to-Case in your communities.
  - a. From Setup, enter Support Settings in the Quick Find box, then select Support Settings.
  - b. Select Enable Question-to-Case in Communities.
  - c. Click Save.
- 2. Add the Question from Chatter field to the Case Detail view.
- 3. Add the Escalate to Case action to the Feed Item layout.
- **4.** Customize the Escalate to Case action layout.
- **5.** Perform optional customizations:
  - **a.** Set up a queue for cases created from questions.
  - b. Set up processes to automatically create cases from unresolved questions that meet specified criteria.

For details on steps 2 through 5, search for "Set Up Question-to-Case" in the Salesforce Help.

# Set Up the Community Case Feed

The community case feed lets community users and support agents see all case interactions in a unified feed, and lets agents take more actions directly from the console. To set up the community case feed, enable it in your organization and make sure that the case page in your community is properly configured.

(1) Important: Before setting up the community case feed, read Community Case Feed Considerations.

- 1. Enable the community case feed:
  - **a.** From Setup, enter *Support Settings* in the Quick Find box, then select **Support Settings**.
  - b. Select Enable Community Case Feed.
  - c. Optionally, select Enable Email Notifications for Case Posts (recommended).
  - d. Click Save.
- 2. If your community was built using Salesforce Tabs + Visualforce, make sure that your case page includes a Chatter feed.
- **3.** If your community uses the Koa, Kokua, or Napili template, confirm that your active case detail page supports the community case feed:
  - In Community Builder, click
  - b. Click Page Management.
  - **c.** Find Case Detail in the Name column, and make sure that the active page assigned to it is either Chatter Case Detail (the default) or Record Detail.



If you change the active case detail page, publish your change.

(Important: If the community case feed is enabled and you use Basic Case Detail as your active case detail page, external users only see case comments—not Chatter posts or emails—in their case feed. This gives external users far less visibility into their cases. To give users a full view of their case interactions, use Chatter Case Detail or Record Detail as your active case detail page.

## Community Case Feed Considerations

Before setting up the community case feed, review this essential information.

If the community case feed is enabled:

- Agents can use the Community action in the console case feed to answer community 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 community users.

## **EDITIONS**

Available in: Salesforce Classic

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

## **USER PERMISSIONS**

To enable the community case feed:

- "Customize Application"
- Compact case feed enabled in your organization



Available in: Salesforce Classic

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

- External community 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:
- The case contact is notified by email when someone makes an externally visible post on their case. Users 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 may create duplicate email notifications.
- Users in communities built on the Napili template or Salesforce Tabs + Visualforce can turn off these notifications in their email notification settings by deselecting **Posts on one of my cases** under "Email me when someone...".

# CUSTOMIZE TEMPLATES WITH COMMUNITY BUILDER

# Community Builder Overview

Community Builder in conjunction with community templates for self-service lets you create, brand, and publish a custom community that looks great on any mobile device! Choose a template to quickly start your community, and then style the pages to match your company's branding.

With Community Builder, you can:

- Quickly style the community to match your company's branding.
- Edit community pages and components with the Community Builder to customize their design and content.
- Preview your community to ensure that it appears correctly on different devices.
- Publish your changes to make them available to everyone in your community.
- Apply template updates to your community as soon as they become available.

Community Builder works in conjunction with all of the preconfigured templates.



Available in: Salesforce Classic

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



Note: If you don't want to use the preconfigured templates, you can still create a custom community in Site.com Studio. However, you won't be able to use Community Builder for branding.

To try out a different template, go back to Community Management and change your template selection. But don't worry—you can always switch back to the first template you chose. To switch back, set the home page back to its original URL in Site Configuration in Site.com Studio.

## **Known Limitations**

• Community Builder doesn't support branding for sites that weren't created by using one of the preconfigured templates.

# Navigate Community Builder

Community Builder lets you quickly create and style your custom community to match your organization's branding.

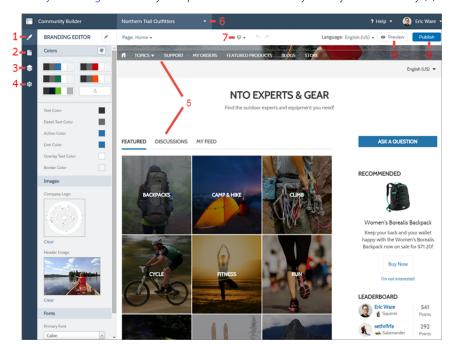


**Note:** Community Builder only supports branding for communities that were created with one of the Community Builder-based templates.

From Community Management, click the Community Management menu in the global header, then click **Go to Community Builder** to brand and configure your community. You can also access Community Builder from the All Communities page in Setup by clicking **Builder** next to the community name.

In Community Builder, you can:

- Brand the community to match your organization's style (1).
- Edit your community pages in the Page Editor to add, update, or remove page components (2).
- Manage, create, and delete community pages in the Page Manager (3).
- Accept updates to your community's template and edit community settings (4).
- Navigate to the community page that you want to style by clicking links and navigation menu items (5).
- Use the Communities menu (6) to:
  - Access Community Management to manage community analytics, login, registration, reputation, topics, and other settings.
  - Go to Site.com Studio to add advanced community customizations.
- See how your community appears on different devices (7).
- Preview the community in a new browser window (8).
- Publish your changes to make your updates available to everyone in your community (9).



### **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

To create, customize, or publish a community:

"Create and Manage Communities"

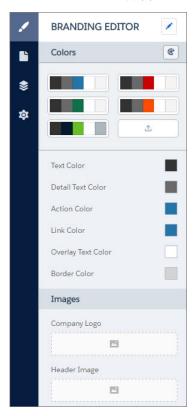
# Brand Your Community with Community Builder

Use Community Builder's enhanced Branding Editor to efficiently apply color and style to your community. Choose a color scheme with the color palette, which provides a wide range of colorized text elements for a personalized design. Match your colors precisely by uploading your own logo to automatically generate a custom color palette.

Each template includes predefined styles to control the appearance of the pages. These styles give you a head start with your community, and you can easily customize the styles further to suit your needs. After you've created a community, brand and style your pages with Community Builder's Branding Editor.

Depending on the template that you select, you can use Community Builder to:

- Apply a color scheme that's appropriate for your template with the color palette.
- Choose colors for text, borders, and button backgrounds.
- Upload your own company logo image to generate a custom color palette based on its main colors.
- Maintain your own color palettes by saving or removing them as needed.
- Specify font family, style, and weight.
- Change header and page background color, font family, font size, and font color.
- Use custom CSS to apply your own styles



### **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

To create, customize, or publish a community:

"Create and Manage Communities"

Note: The available branding options vary depending on the template that you're using and the page that you've selected.

When you upload your own logo to the Branding Editor, Community Builder extracts its colors behind the scenes, and suggests a set of colors based on those. To modify a suggested color, click the color swatch and adjust the color by using the slider or by entering hex values.



To brand your community:

- 1. Navigate to the pages that you want to view as you brand by using the Page menu in the toolbar.
- 2. Define styles, such as:
  - The range of colors that are used by the entire site, by selecting a palette swatch.
  - A specific color, by using the relevant color picker or entering a hex value.
  - An image, by clicking the image area and uploading an image.
  - The font type, size, or weight, by selecting an option in the relevant drop-down list.

Your changes are saved automatically and appear instantly on the page canvas.

Alternatively, click on the Branding Editor toolbar to use your own CSS styles. We recommend using CSS sparingly and only when necessary, because future releases of template components might not support all CSS customizations.

# Manage Your Community's Pages in Community Builder

Page Manager centralizes all your page-related needs, from page creation to deletion and everything in between.



**Note:** This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.

In Page Manager (1), you can:

- Create custom pages (2).
- Delete pages (3).
- Select a page (4) to edit its properties (5).
- Set the active page (5).
- Create and manage alternative page variations of the selected page (6).

## **EDITIONS**

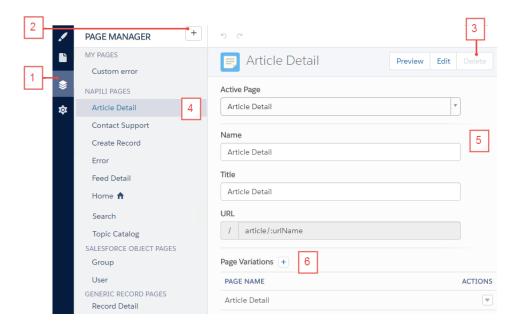
Available in: Salesforce Classic

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

## **USER PERMISSIONS**

To customize or publish a community:

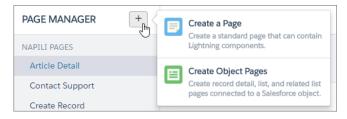
 "Create and Manage Communities



# Create Custom Pages with Community Builder

Extend your community template by creating custom pages and adding content that meets your unique business needs. And in the Napili template, you can also create custom record detail, list, and related list pages to get the most from your Salesforce data.

- Ø
  - **Note:** This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.
- 1. In Community Builder, click on the left sidebar to display the Page Manager.
- 2. Click + on the toolbar.
- **3.** To create:
  - A blank standard page that's based on a layout or one of the template's pages, click Create
     a Page. For example, you could start with the Home page template and customize it to
     your needs. Give the page a unique name and specify the static portion of the page's URL.
  - A record detail, a list, and a related list page associated with one of your Salesforce objects, click Create Object Pages (in Napili only). Select the object that you want to associate with the page.



4. Click Create.

### **EDITIONS**

Available in: Salesforce Classic

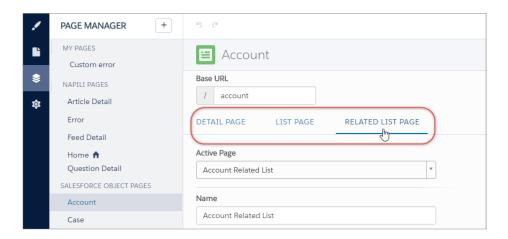
Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

#### **USER PERMISSIONS**

To create pages in Community Builder:

 "Create and Manage Communities Custom standard pages that are based on a layout appear under My Pages in Page Manager. Pages that are based on a default template page appear under its Page Variations section.

Custom object pages appear under Salesforce Object Pages.

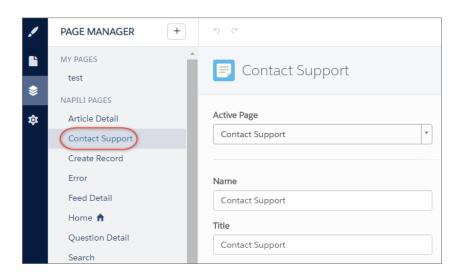


- 5. Open a standard page by clicking **Edit** on the toolbar, or open an object page by clicking > **Edit** in the Page Variations section.
- **6.** Add and configure page components.
- 7. Preview and publish your community when you're done.
- Tip:
  - The Page Variations section lets you quickly create alternative versions of the selected page. For example, you could create three different Question Detail pages to test out various layouts or styles. New pages are based on the default template page—in this case, Napili's Question Detail page—and you can choose from several different layouts. To create a page variation, click + in the Page Variations section.
  - Use the Navigation Menu component to create custom navigation nodes for new pages. For more information about templates and components, see *Using Templates to Build Communities*.

# Set Active Pages for Your Community in Community Builder

You can create several custom pages for the same purpose, but only one can be active in your community at a time. For example, you could create three different Question Detail pages to test out various layouts or styles. When you select your preferred Question Detail page, you automatically deactivate the default Question Detail page defined in the template.

- Ø
- **Note:** This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.
- 1. In Community Builder, click on the left sidebar to display the Page Manager.
- 2. Select the page you want to update.



## **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

To customize or publish a community:

 "Create and Manage Communities

- **3.** Select your preferred active page.
  Only the page selected in the Active Page drop-down list is visible in your community.
- **4.** Preview your changes, and then click Publish to make your changes live in the community. Inactive pages remain available to use in your community unless you delete them.

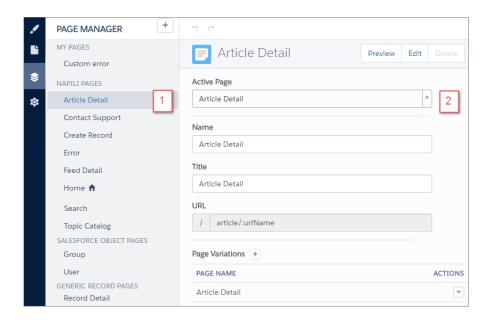
# Page Properties and Types in Community Builder

Use Page Manager to view and edit the properties of the various pages that make up your community.

## EDITIONS

Available in: Salesforce Classic

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



## Page Types (1)

We've grouped your community's pages by type in Page Manager.

#### My Pages

The custom standard pages that you create. (Custom object pages appear under Salesforce Object Pages.)

#### **Template Name\*** Pages

\*Napili, Koa, Kokua, or Aloha

The default pages that come with the community template.

#### **Salesforce Object Pages**

The pages of the objects in your community, which include the object's record detail, list, and related list pages.

#### **Generic Record Pages**

The default record detail, list, and related list pages that come with the Napili template only. These generic pages are used to display record information for a Salesforce object when custom object pages don't exist.

#### **Login Pages**

The default login pages that come with the community template.

## Page Properties (2)

The properties available to each page depend on the page type selected.

#### **Active Page**

Lets you specify which page is active and visible in your community when you create several custom pages for the same purpose. For example, if you create a second Case Detail page and make it active, the default Case Detail page defined in the template is deactivated.

#### Name

The editable name of the page as it appears in Community Builder.

#### Title

The editable title of the page as it appears in the browser's tab or window title. Used for bookmarking the page and appears in search engine results.

#### Description

Used for SEO purposes and appears in search engine results. Available for the Contact Support, Error, Home, and Topic Catalog template pages, and all pages listed under My Pages and Login Pages.

#### URL

The URL of the page. Editable only in custom standard pages.

#### **Base URL**

Lets you simultaneously change the URLs for all pages—record detail, list, and related list—associated with an object. Promotes consistency by ensuring all object pages share a common URL prefix. Editable only in custom object pages.

# Edit Community Pages and Components in Community Builder

You can add new components to your community's pages or edit the properties of existing components to customize each page to suit your needs.



**Note**: Drag-and-drop components are available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.

If you're adding components to a new custom page, spend some time planning the composition of the page based on the goals for the page.

- 1. In Community Builder, click on the left sidebar to display the Page Editor.
- 2. From the Page menu in the top toolbar, select the page that you want to edit.



## **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

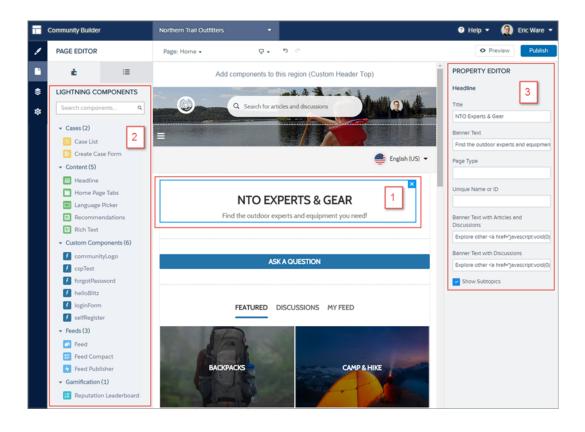
To customize or publish a community:

 "Create and Manage Communities

The Lightning Components tab 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 Lightning Components tab onto an editable area of 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 tab. When you select a component, Community Builder highlights the component with a blue border and displays the component's properties in the Property Editor on the right.
- **5.** Update the component as required.



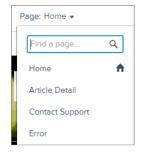


Tip: You can also create custom Lightning components and use them on community pages. For more information on creating custom Lightning components and enabling them for Community Builder, see the *Lightning Components Developer's Guide*.

# Change the Page Layout in Community Builder

Quickly change the look of your community's pages by switching to a different layout. You can even create your own custom layouts in the Developer Console and import them to use in your community.

- Note: This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.
- 1. In Community Builder, click on the left sidebar to display the Page Editor.
- 2. From the Page menu in the top toolbar, select the page that you want to edit.



## EDITIONS

Available in: Salesforce Classic

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

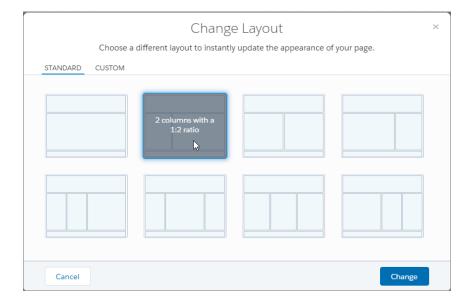
#### **USER PERMISSIONS**

To customize or publish a community:

 "Create and Manage Communities 3. Click Change Layout in the Property Editor.



**4.** Select the new layout. If you've added a custom layout, you can access it in the Custom tab.



#### 5. Click Change.

If the structure of the new layout is different from the current layout, some regions won't be 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**.

For more information on custom layouts, see the *Lightning Components Developer's Guide*.

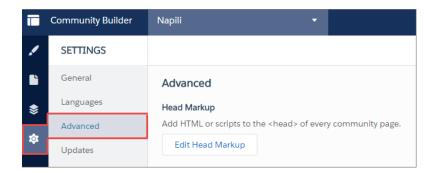
# Add Markup to the Page <head> to Customize Your Community

Add custom analytics, improve your SEO results, and more by adding custom markup to the page <head> in Community Builder.

Note: This functionality is available in the Winter and Spring '16 versions of the Koa, Kokua, and Napili templates and the Spring '16 version of the Aloha template.

For example, you can customize your community's pages to suit your needs by adding:

- Custom analytics code, such as Google Analytics<sup>™</sup>
- SEO meta tags that are visible only to search engines
- References to external JavaScript files and third-party libraries
- Custom JavaScript blocks
- A favicon or web page icon
- 1. In Community Builder, click on the left sidebar and click **Advanced**.

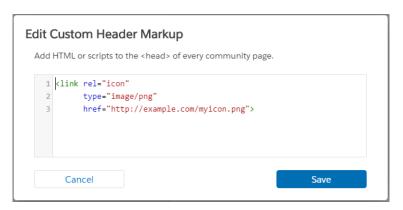


#### 2. Click Edit Head Markup.

- **3.** Enter the required HTML or JavaScript.
- **4.** Save your changes.

When you add custom markup, the code is added to the <head> of every page.

Example: Here we've added HTML to include a favicon on our community's pages.



### **EDITIONS**

Available in: Salesforce Classic

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

### **USER PERMISSIONS**

To customize or publish a community:

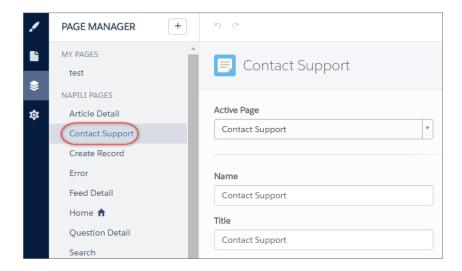
"Create and Manage Communities

# Delete a Community Page in Community Builder

Remove a community page that you no longer need by deleting it from the Page Manager in Community Builder.

You can delete only inactive community pages. You can't delete an object page (record detail, list, or related list) if it's the only page associated with a given Salesforce object. If you have more than one object page for the same object, you can delete the inactive one.

- 1. In Community Builder, click on the left sidebar to display the Page Manager.
- 2. Select the page that you want to remove.



## EDITIONS

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

To customize or publish a community:

"Create and Manage Communities

3. Click **Delete** on the toolbar or click **> Edit** in the Page Variations section.

# Share More Salesforce Object Data in Your Community

Napili allows you to share record data for accounts, cases, contacts, tasks, events, and custom objects with minimal configuration. Record data respects user permissions via licenses, profiles, permission sets, and sharing rules.

- Note: This functionality is available in the Winter '16 and later versions of the Napili template.
- Create a list of records and link to it.
- Display record details in your community with the out-of-the-box Record Detail page or create
  a custom page.

You can also add groups to your community in the same way.

## EDITIONS

Available in: Salesforce Classic

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

## **USER PERMISSIONS**

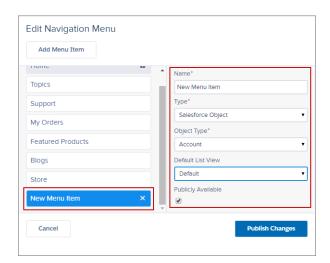
To create, customize, or publish a community:

 "Create and Manage Communities"

# Share a List of Records in Your Community

Create record list views for accounts, cases, contacts, and custom objects and link to them from the Napili navigation menu. Use an out-of-the-box or custom page layout to display the list of records.

- Note: This functionality is available in the Winter '16 and later versions of the Napili template.
- 1. In Community Builder, drag and drop the Navigation Menu component to add it to the appropriate page in the template. We recommend adding it to the Home page.
- **2.** Create a navigation menu item pointing to a supported Salesforce object. Currently, Napili supports accounts, cases, contacts, and custom objects.



## **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

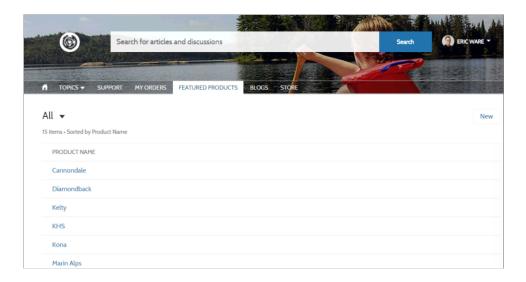
To create, customize, or publish a community:

 "Create and Manage Communities"

- 3. Publish your changes.
  - Note: If your community is active, your navigation menu item changes will immediately appear to your community members.

That's it! This creates a navigation menu item, which links to a list of the selected object's records. Under the hood, your data is retrieved from Salesforce and displayed using the generic Record List page. This page is available out-of-the-box in Napili and uses the Record Home List View Lightning component to display data in an appropriate layout.

- Note: The generic Record List page provides the default list view layout for objects that don't have 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 page. If you modify the Record List page, be sure to account for all the affected objects.
- Example: A list view page for a custom object called Featured Products.



- Creating a navigation menu item is the easiest way to link to a list of records for an object. If you prefer to use a custom list view page for an object, you can create a new page for your community using Community Builder. Choose the Standard page type with a single-column layout. Add the Record Home List View component to the page, configure the component properties to point to the object, and then publish the page. To link to the page, create a custom navigation menu item and use the internal page URL.
- 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.
- You can hide a navigation menu item from quest users to block access to the associated record list view page.
- 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.
- Clicking a record in the list view displays the record details, which are displayed using the Record Detail page that comes out of the box with the Napili template.
- The Record List page and the Record Home List View component are not available in the Koa and Kokua templates.

#### SEE ALSO:

Navigation Menu Record List

## Display Record Details in Your Community

Display record details using the generic Record Detail page or create custom record detail pages.

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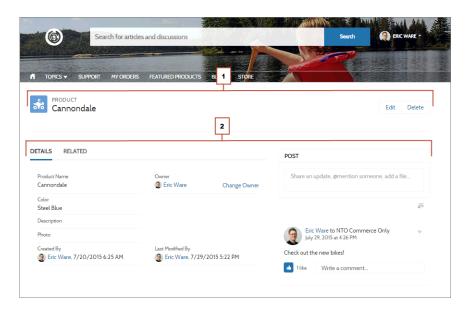
Note: This functionality is available in the Winter '16 and later versions of the Napili template.

Napili supports a record detail page that you can use out of the box with no configuration. All objects in your community 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 (that uses a preassigned case detail layout) and clicks on 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 Headline and Record Information Lightning components to display record data.

- **Record Headline**: Displays the record name and key record highlights along with buttons to edit and delete the record.
- Record Information: Displays all record details including related records and the record feed.
   It also allows users to create new related records and post to the record feed.

Optionally, you can create custom record detail pages for accounts, contacts, cases, tasks, events, and custom objects.

- 1. Create a new Data Detail page in Community Builder and pick a supported object.
- **2.** Add the Record Headline and Record Information components to the page and configure the component properties from the Property Editor on the right.
- 3. Click to access Page Management in the Community Builder settings, and then select the custom page as the active page for the object.
- 4. Publish your changes.
  - Note: If your community is active, your navigation menu item changes will immediately appear to your community members.
- **Example**: The record detail page for a custom object with the Record Headline (1) and Record Information (2) components.



## **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

To create, customize, or publish a community:

"Create and Manage Communities"

- Some objects have preassigned, active record detail pages to display record data (such as cases). You can check the available pages and assignments for each object in Community Builder settings, under Page Management.
- Objects without preassigned record detail pages use the generic Record Detail page. If you modify the Record Detail page layout or configuration, be sure to account for all objects that use this page layout.
- Users without the necessary license, profile, and permissions can't access record data.
- Users with the necessary permissions can create records from the related lists, and edit and delete the record from the record headline. These actions aren't supported on mobile devices.
- Page layouts for each object in Salesforce determine what fields display in the Record Information component, and the fields in the Highlight Panel layout determines what displays in the Record Headline component. This feature includes support for record types.
- You must enable feeds on records in Salesforce to allow users to post on them in communities.
- The Record Detail page, the Record Headline component, and Record Information component are not available in the Koa and Kokua templates.

#### SEE ALSO:

Record Banner
Record Information Tabs
Record Related List

## Add Groups to Your Community

Want more collaborative communities? Allow community members and guest users to browse and join groups in your Napili community. Use the out-of-the-box design for groups in Napili, or create your own customized version of the group detail page using separate components.



Note: This functionality is available in the Winter '16 and later versions of the Napili template.

1. To enable groups in your community, add groups to the community navigation menu.

This automatically displays a menu item that links to a list of groups in your community. If you make the menu item publicly available, even guest users who aren't logged in to your community can browse through the list of active public groups.

## **EDITIONS**

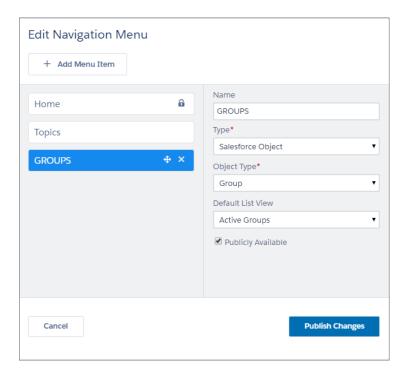
Available in: Salesforce Classic

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

## USER PERMISSIONS

To create, customize, or publish a community:

 "Create and Manage Communities"



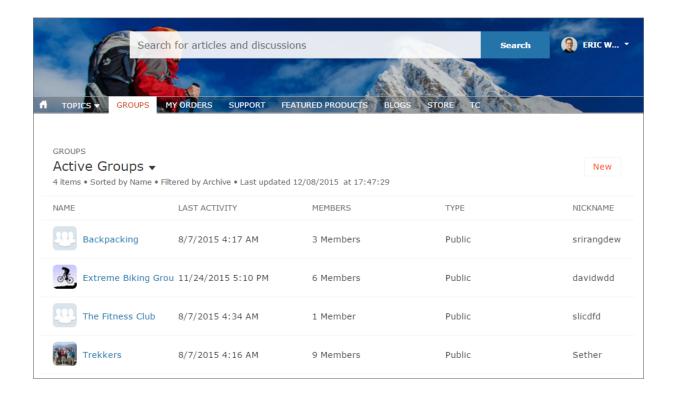
- 2. Publish your community.
- **3.** If you haven't already, customize the group publisher layout to include the Add Member action. This action allows group owners and managers to add members to the group, and isn't shown in the list of actions in the group by default.

When users click on the name of an active group in the community, 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.

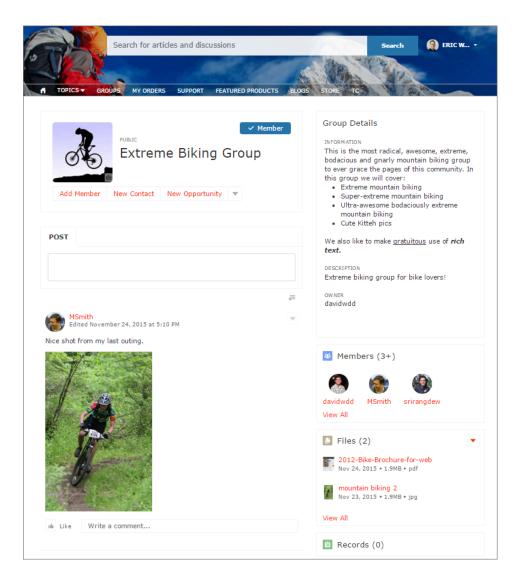
A few things to keep in mind:

- When you enable groups in your community, 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 community pages to be responsive across desktop and mobile device browsers.
- If you prefer to use a different layout or want more granular control over the placement of group content, create a custom community page and use the Group Banner, Group Details, Group Related List, and Feed components. Depending on how you use the individual components, custom pages might not be responsive across all devices.
- Group announcements aren't supported in communities.

#### Group list in Napili



Group detail page in Napili



# Manage Your Community's General Settings in Community Builder

Use the General settings page to track which template you're using, view your community's status, and customize your template. If you're using the Napili template, easily access your navigational and featured topic settings.

You can manage these general settings for your community from within Community Builder when you use any of the preconfigured community templates provided by Salesforce.

To access general settings in Community Builder, click on the left sidebar and then click **General**.

## **EDITIONS**

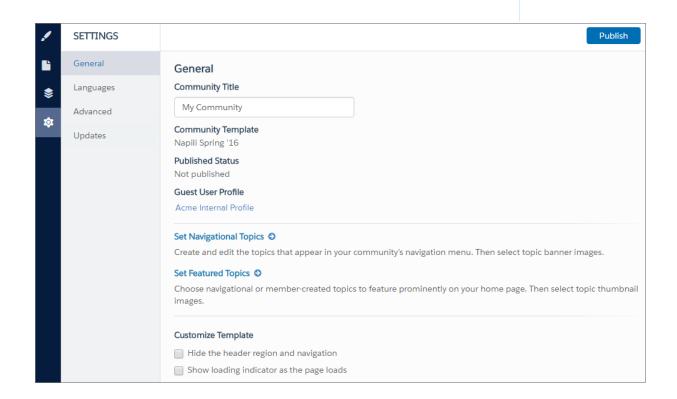
Available in: Salesforce Classic

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

## **USER PERMISSIONS**

Communities"

To modify general settings"Create and Manage



#### General settings include:

#### Community Title

Lets you set the title for your community. The title briefly appears in the browser's title bar before your community's Home page loads.

#### Community Template

Displays the name and version of the template that your community is using.

#### Published Status

Indicates whether your community is published. If it's published, click the link to open the live community in a separate browser tab.

#### Guest User Profile

Displays the associated guest user profile. Clicking the link takes you 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 "Configure the Guest User Profile for Unauthenticated Users" in the Community Templates for Self-Service Implementation Guide.

Set Navigational Topics (Napili template only)

Click the link to go to Community Management, where you can define topics to be used for navigation.

Set Featured Topics (Napili template only)

Click the link to go to Community Management and define featured topics.

- **Hide the header region and navigation** (Napili Winter '16 and Koa, Kokua, and Napili Spring '16 versions only)

  Hide the defaults community header (which includes the header image, search box, community menu, and user profile navigation menu) in all the pages of your community. Select this option if you want to replace the header with your own custom version.
- Show loading indicator as the page loads (Napili Spring '16 version only)

Displays a ghost version of your community page until the page loads completely, which enhances the loading experience. If the page header is highly customized and the ghost version varies vastly from the real version loading in the browser, you can disable this option.

# Update Your Community's Template in Community Builder

Take advantage of the latest Koa, Kokua, Napili, and Aloha templates, which use Lightning technology and components to deliver better performance and a richer visual experience.



**Note:** If your community uses a pre-Winter '16 Koa, Kokua, or Napili template, or a pre-Spring '16 Aloha template, we strongly recommend that you update to the latest template version. Customer support for older templates is being discontinued in the Summer '16 release (May 2016). Also, many powerful Community Builder and template features require the latest versions of these templates.

Here are some of the things to keep in mind before you update your template:

- If your community uses the Winter '16 Koa, Kokua, or Napili template, your customizations are
  maintained for all pages except the login pages, which retain branding but lose any custom
  code or component customizations.
- If your community uses a pre-Winter '16 Koa, Kokua, or Napili template, or a pre-Spring '16 Aloha template:
  - Most component customizations and properties do *not* carry over. For the Koa and Kokua
     self-service templates, general settings (such as Category Group Name, Top-Level Category, and Company Name) carry over.
     For Napili, topic definitions carry over.
  - Most branding properties defined using the Branding Editor are maintained. However, some community colors might be reset
    to the default values. After you update the template, check the branding properties in Community Builder and update any that
    were reset.
  - When you update the template, the old version of your community is saved. To restore your community to the previous template version, go to Site Configuration in Site.com Studio and manually change the home page back to the old version.

# EDITIONS

Available in: Salesforce Classic

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

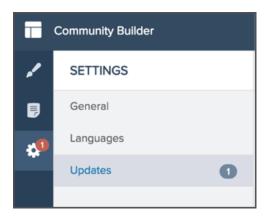
## USER PERMISSIONS

To update your template

 "Create and Manage Communities"

- Your community's home page URL is preserved automatically without any configuration on your part. Users are transparently directed to the new home page when they access the community.
- Template updates for communities using the Salesforce Tabs + Visualforce template aren't managed from Community Builder.

When a template update is available, a red notification icon appears over the Settings icon in Community Builder. You don't have to apply an update when it becomes available; you can wait until you're ready.



To update your template:

- 1. From Community Management, click the Community Management menu in the global header, then click **Go to Community Builder**. You can also access Community Builder from the All Communities page in Setup by clicking **Builder** next to your community name.
- 2. Click Settings > Updates.
- 3. Click **Update** and confirm the update when prompted.
- 4. Review all community pages to make sure that your branding and styles are as you expect.
- 5. Publish your community to apply the template updates.

# Considerations for Changing Your Community Template

Changing your community template affects the community navigation, branding, and customizations.

- You may need to change your community's template to see some new communities features introduced by Salesforce. If you want to keep your current template, you must switch to another template and then switch back to your current template. For example, let's say you are using the Napili template for your community. Salesforce introduces a feature that requires a change (not a simple update) to the template. You must switch your community's template to another template, such as Koa or Kokua, and then switch it back to Napili.
- Salesforce object data carries over, but all branding and component customizations do not. You'll need to redo all customizations.
- Switching between templates updates the navigation in Community Management. To view all available options in Community Management, regardless of template selection, select **Administration** > **Preferences** > **Show all settings in Community Management**.
- Your community URL changes when switching from a Salesforce Tabs + Visualforce template to a Community Builder template, or vice versus. For example, in Community Builder-based templates /s is appended to your URL. Be sure to update any links to your community with the new URL.



To learn more about using the Kokua, Koa, and Napili templates, see the *Community Templates for Self-Service Implementation Guide*. To learn more about using the Aloha template, see the *Getting Started with the Aloha Community Template for Salesforce Identity*.

# Preview Your Community with Community Builder

Preview how your community appears in a desktop browser window and on mobile devices. Community Builder's preview option lets you see how your community will appear when it's live.

• To preview the community in a browser window, click **Preview** in the toolbar.



From Preview mode, you can further opt to see the community in its own browser tab as a
customer would see it by clicking the pop-out button next to **Preview**.



- Use the options in the preview how the community looks on different devices:
  - For smartphones, click Phone.
  - For tablets, click **Tablet**.
  - For desktop computer screens, click Fluid.
  - For landscape or portrait orientation on a smartphone or tablet, click 🕰 .

## **EDITIONS**

Available in: Salesforce Classic

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

### **USER PERMISSIONS**

To create, customize, or publish a community:

 "Create and Manage Communities"

# Publish Your Customizations with Community Builder

Publish your changes in Community Builder to make the updates available to everyone in your community.

- Note: Your community must be active before you can publish the changes you've made in Community Builder.
- 1. From Setup, enter *All Communities* in the Quick Find box, then select **All Communities**. Then click **Manage** next to the community name.
- 2. From Community Management, click the Community Management menu in the global header, then click **Go to Community Builder**. You can also access Community Builder from the All Communities page in Setup by clicking **Builder** next to your community name.
- **3.** Optionally, preview your community to make sure that your updates appear as expected.
- **4.** When you're happy with your changes, click **Publish** in the toolbar to publish your changes. You'll receive an email notification when your changes go live.

### **EDITIONS**

Available in: Salesforce Classic

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

#### **USER PERMISSIONS**

To create, customize, or publish a community:

 "Create and Manage Communities"

# COMPONENTS FOR BUILDING YOUR COMMUNITY

# Customize Your Community's Template Pages

Pages are the building blocks of your community. They control how your users see and interact with the community.

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 of the preconfigured community templates are ready for you to use with very little configuration or customizing needed. Additionally, you can create new pages or drag and drop other components on to existing pages as needed. If you create custom Lightning components, they appear in the list of available components on the left side of the page.

When you open a page for editing, you can set properties for how information appears, move components to different positions, or delete any components you don't need.



Note: You can edit components within a page and delete inactive pages, but you can't rename pages.

For example, the Home page in the Napili template contains components that let customers see trending articles and topics, explore articles organized by category, read discussions from the community, search or information, ask a question, and contact support. If you're creating a community to deflect cases only and don't want to let customers open a case within the community, you can remove the component for contacting support.

To edit a page, go to Community Builder

- 1. From the Page drop-down, select the page to edit.
- Click to open the Page Editor.
- **3.** Select the component you want to edit.
- **4.** In the Property Editor, edit any of the properties of the component.
- 5. To add a component to the page, simply drag it from the Lightning Components menu and drop it where you want it on the page.
- **6.** To delete a component from the page, hover over the component and click  $\times$ .
- 7. After you're done configuring the page, click **Publish**.

# Kokua Template's Pages

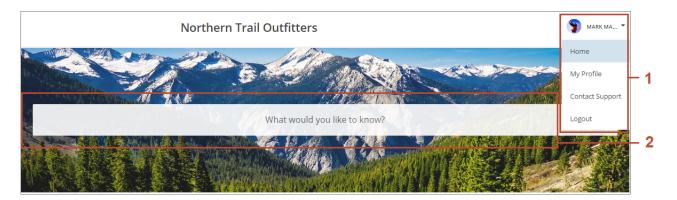
A picture is worth a thousand words, and we built the Kokua template to give your users a visually rich self-service community. This template lets users browse and search your articles based on data categories. The template also lets them access cases and browse data categories in the left navigation component.

This section highlights each page of the Kokua template and includes a summary of the components that are contained in each page.



**Note**: To use this template, you must enable and set up Salesforce Knowledge. Contact Salesforce if you need to add Knowledge licenses.

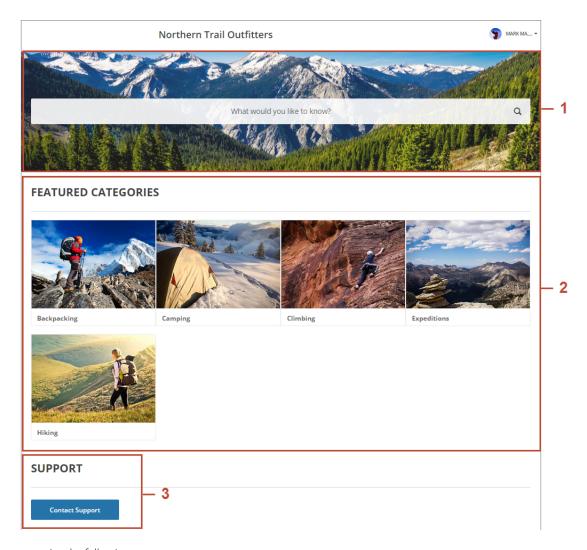
# **Shared Components**



All pages in the Kokua template include the following components:

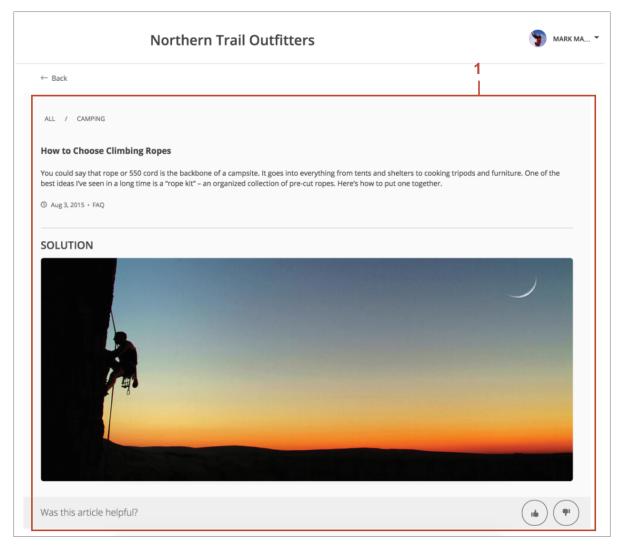
- Toggle Button requires no setup and lets users display or collapse the left navigation menu for mobile devices and tablets. It doesn't appear in the desktop view.
- Back Button requires no setup and displays a button that lets users navigate to the previous context..
- Profile Header (1) displays a user's name (or nickname) and profile picture with a drop-down that lets users navigate to and manage their profile, contact support, and log out.
- Search (2) lets users search articles within the context of the page they're viewing.

# Home



- Featured Search (1) requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.
  - Note: Featured Search in the Home page uses the expression {!Site.TopLevelCategory} to search based on the top-level category, while Featured Search in the other pages uses the expression {!category} to search within the current category.
- Featured Data Categories (2) requires no setup, and lets you specify the number of categories to display and change the title of the component.
- Contact Support (3) requires no setup, and lets you change the title of the component and the text for the button label.

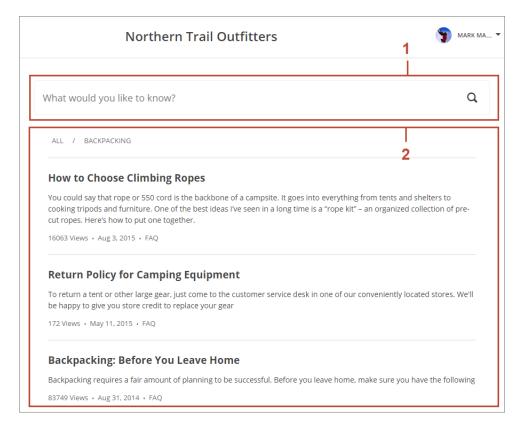
# Article Detail



This page contains the following components:

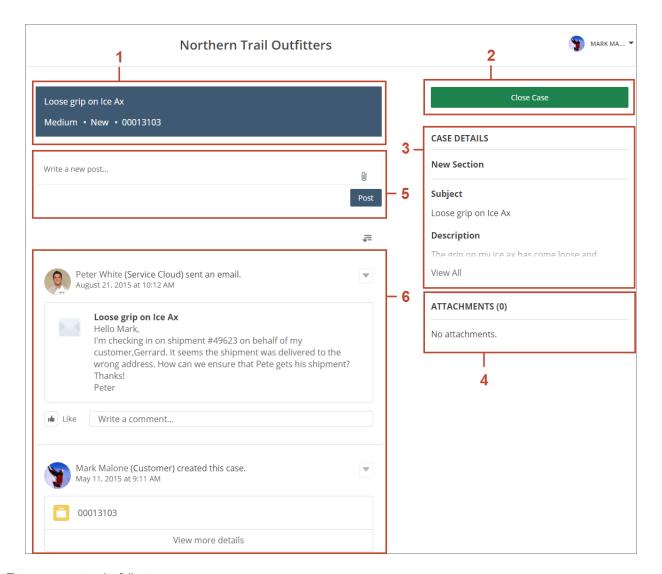
• Article View (1) requires no setup.

## **Article List**



- Featured Search (1) requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.
  - Note: Featured Search in the Home page uses the expression {!Site.TopLevelCategory} to search based on the top-level category, while Featured Search in the other pages uses the expression {!category} to search within the current category.
- Article List (2) requires no setup, but lets you specify how many articles appear in the list of returned articles.

## Case Detail

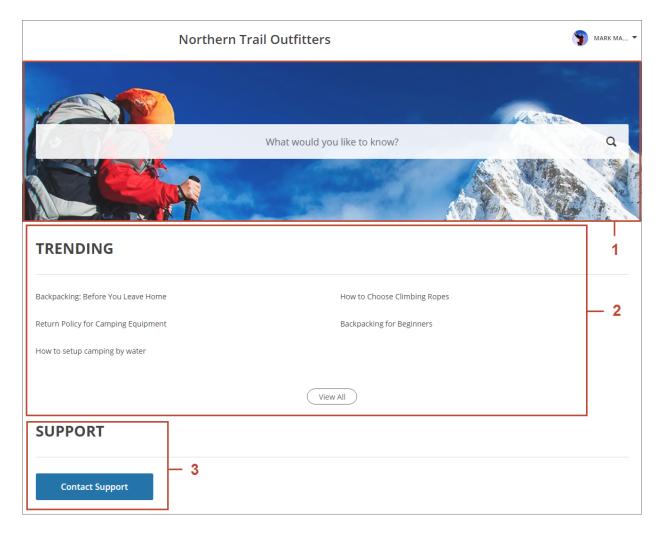


- Case Banner (1) requires no setup.
- Set Case Status Button (2) requires no setup, but lets you specify label text for the status button.
- Case Detail (3) requires no setup.
- Case Attachments (4) requires no setup.
- Case Feed Publisher (5) lets users create Chatter posts on cases, check case status, and upload attachments from any of their devices.

  If you're using Basic Case Detail as your active case detail page, users see the Case Comments Publisher component instead.
- Case Feed (6) displays a Chatter feed of all case interactions, including Chatter posts, case emails, questions related to the case, and attachments. If you're using Basic Case Detail as your active case detail page, users see the Case Comments component instead.

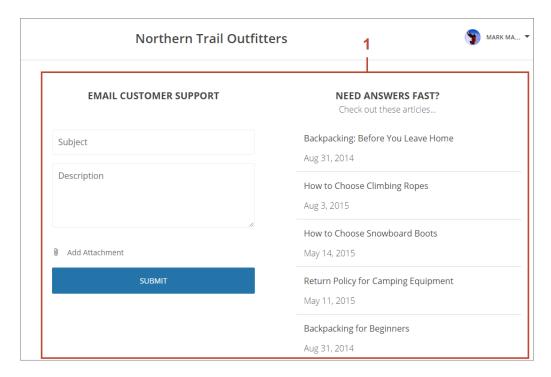
  Make sure to enable the community case feed to expose case interactions in the feed.

# **Category Home**



- Featured Search (1) requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.
  - Note: Featured Search in the Home page uses the expression {!Site.TopLevelCategory} to search based on the top-level category, while Featured Search in the other pages uses the expression {!category} to search within the current category.
- Trending Articles (2) requires no setup, but lets you specify the number of categories and articles display. You can also change the title of the component.
- Contact Support (3) requires no setup, and lets you change the title of the component and the text for the button label.

# **Contact Support**



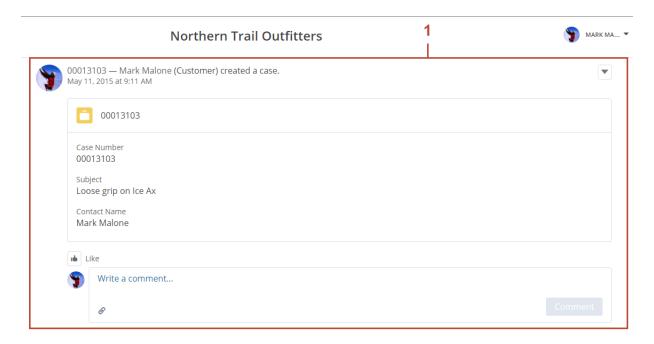
This page contains the Create Case Form (1), which requires no setup for authenticated users, but lets you change label text and enable authenticated users to attach files to the case. This component searches text as it's being entered into a case, and displays articles based on the typed text. To let guest users create cases, you'll need to set up Web-to-Case and create a case publishing action for guest users. You can also protect your community from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.

#### **Error**

Oops, something went wrong. Please refresh the page and try again.

This page displays an error message that you configure by changing the text in a Content Block component.

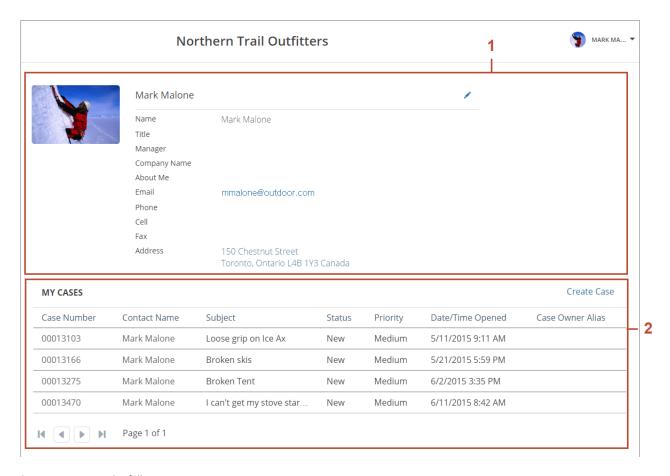
## Feed Detail



This page contains the following components:

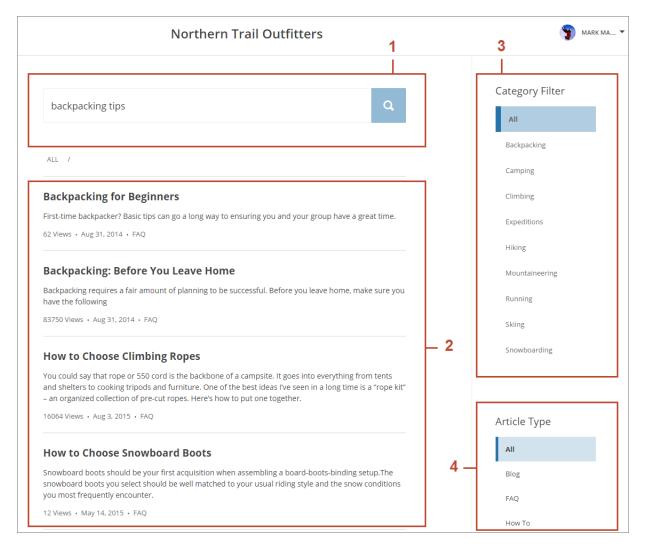
• Feed Post & Comments (1) displays the detailed view of an individual post or comment in the case feed, and isn't configurable. Users reach the Feed Detail page by clicking the time stamp of an item in the case feed.

## My Cases



- User Profile Summary & Image (1) displays a user's profile photo and contact information, and isn't configurable. Users see a Follow button on other users' profiles.
- Case List (2) displays a user's list of cases. Only case numbers are clickable.

#### Search



- Featured Search (1) requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.
  - Note: Featured Search in the Home page uses the expression {!Site.TopLevelCategory} to search based on the top-level category, while Featured Search in the other pages uses the expression {!category} to search within the current category.
- Article List (2) requires no setup, but lets you specify how many articles appear in the list of returned articles.
- Category Filter (3) requires no setup.
- Article Type Filter (4) requires no setup.

### Koa Template's Pages

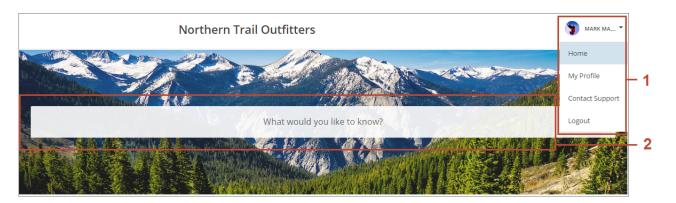
The Koa template is optimized for mobile users by relying on text to let your users search for articles. Your customers can browse and search your articles based on data categories, and can view trending articles for each of the categories in the community. The template has a drop-down menu in the header that lets users view their profile, contact support, and log out of the community.

This section highlights each page of the Koa template and includes a summary of the components that are contained in each page.



**Note**: To use this template, you must first enable and set up Salesforce Knowledge. Contact Salesforce if you need to add Knowledge licenses.

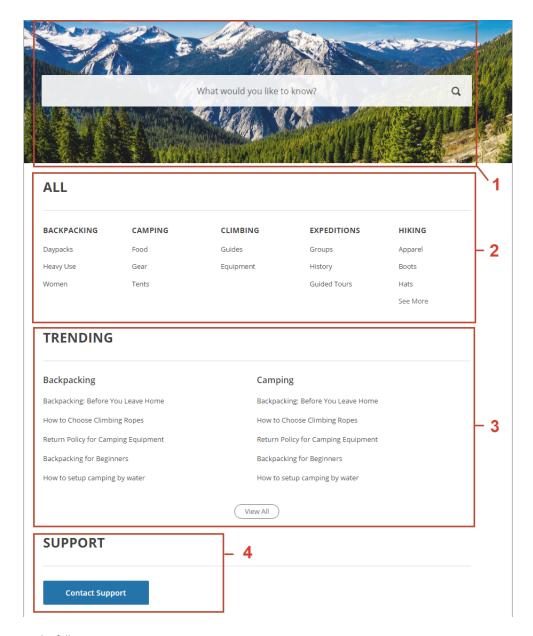
### **Shared Components**



All pages in the Koa template include the following components:

- Profile Header (1) displays a user's name (or nickname) and profile picture with a drop-down that lets users navigate to and manage their profile, contact support, and log out.
- Search (2) lets users search articles within the context of the page they're viewing.

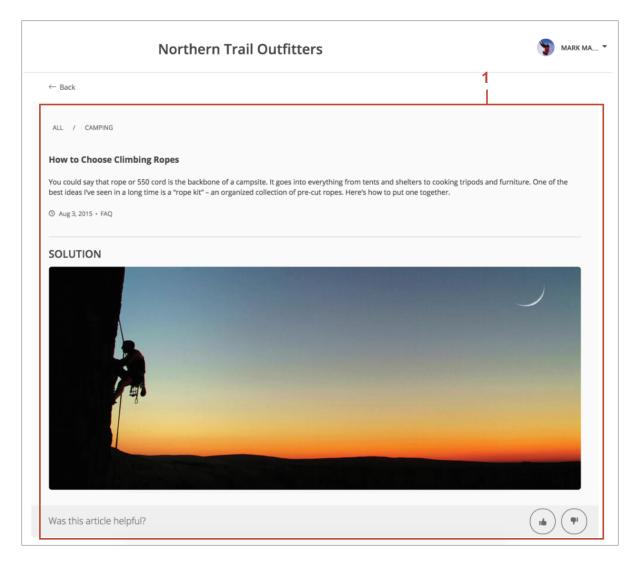
#### Home



- Featured Search (1) requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.
  - Note: Featured Search in the Home page uses the expression {!Site.TopLevelCategory} to search based on the top-level category, while Featured Search in the other pages uses the expression {!category} to search within the current category.
- Expanded Category Navigation (2) requires no setup, but lets you specify the numbers of categories and subcategories that display on the page. You can also change the title text for the component.
- Trending Articles (3) requires no setup, but lets you specify the numbers of categories and articles that display on the page. You can also change the title text for the component.

• Contact Support (4) requires no setup, but lets you change the title of the component and text for the button label.

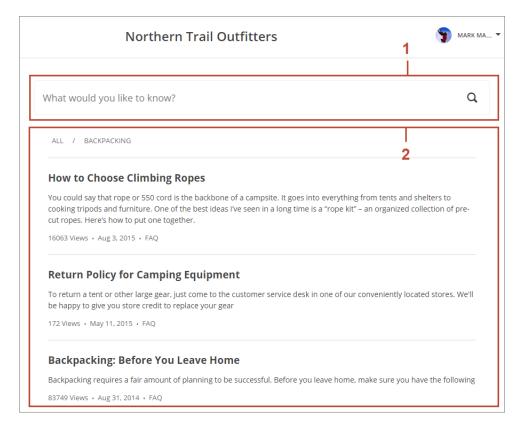
#### **Article Detail**



This page contains the following components:

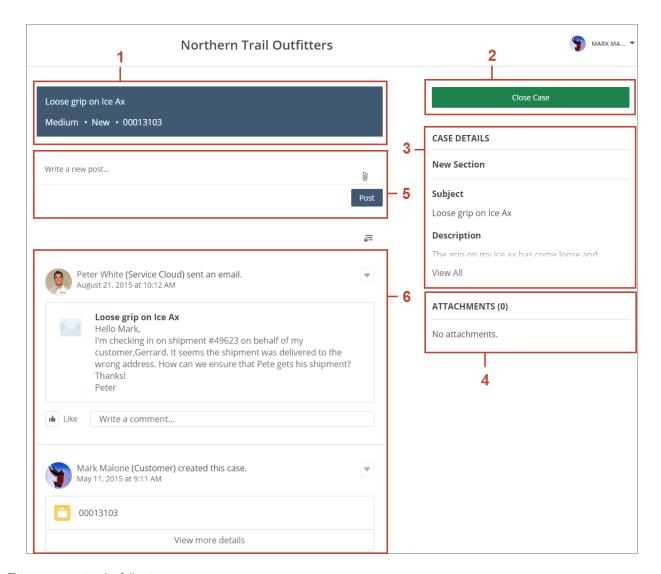
• Article View (1) requires no setup.

#### **Article List**



- Featured Search (1) requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.
  - Note: Featured Search in the Home page uses the expression {!Site.TopLevelCategory} to search based on the top-level category, while Featured Search in the other pages uses the expression {!category} to search within the current category.
- Article List (2) requires no setup, but lets you specify how many articles appear in the list of returned articles.

#### Case Detail

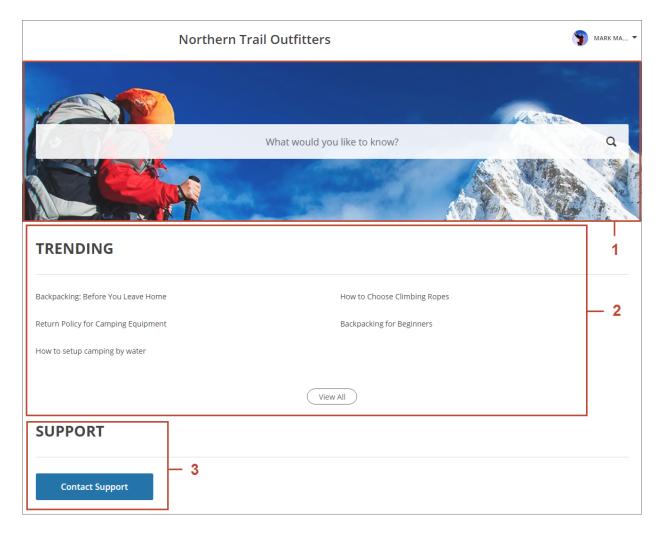


- Case Banner (1) requires no setup.
- Set Case Status Button (2) requires no setup, but lets you specify label text for the status button.
- Case Detail (3) requires no setup.
- Case Attachments (4) requires no setup.
- Case Feed Publisher (5) lets users create Chatter posts on cases, check case status, and upload attachments from any of their devices.

  If you're using Basic Case Detail as your active case detail page, users see the Case Comments Publisher component instead.
- Case Feed (6) displays a Chatter feed of all case interactions, including Chatter posts, case emails, questions related to the case, and attachments. If you're using Basic Case Detail as your active case detail page, users see the Case Comments component instead.

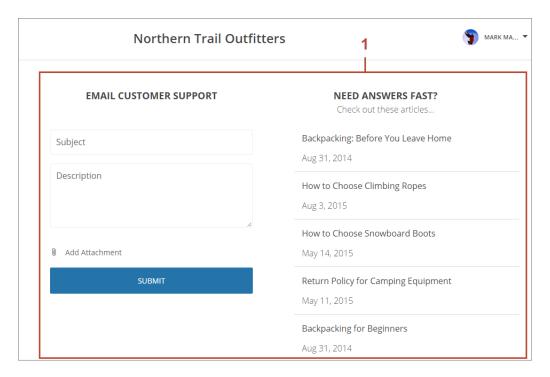
  Make sure to enable the community case feed to expose case interactions in the feed.

### **Category Home**



- Featured Search (1) requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.
  - Note: Featured Search in the Home page uses the expression {!Site.TopLevelCategory} to search based on the top-level category, while Featured Search in the other pages uses the expression {!category} to search within the current category.
- Expanded Category Navigation (2) requires no setup, but lets you specify the numbers of categories and sub-categories that display on the page. You can also change the title text for the component.
- Trending Articles (3) requires no setup, but lets you specify the numbers of categories and articles that display on the page. You can also change the title text for the component.
- Contact Support (4) requires no setup, but lets you change the title of the component and text for the button label.

### **Contact Support**



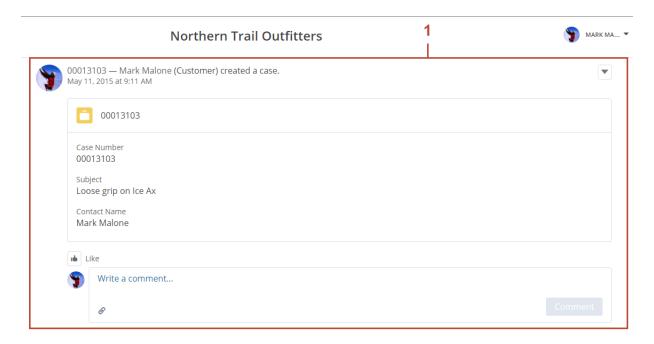
This page contains the Create Case Form (1), which requires no setup for authenticated users, but lets you change label text and enable authenticated users to attach files to the case. This component searches text as it's being entered into a case, and displays articles based on the typed text. To let guest users create cases, you'll need to set up Web-to-Case and create a case publishing action for guest users. You can also protect your community from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.

#### **Error**

Oops, something went wrong. Please refresh the page and try again.

This page displays an error message that you configure by changing the text in a Content Block component.

## Feed Detail

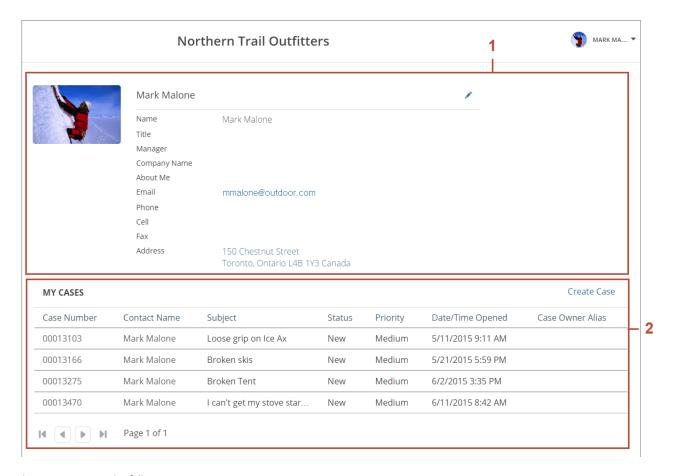


This page contains the following components:

• Feed Post & Comments (1) displays the detailed view of an individual post or comment in the case feed, and isn't configurable.

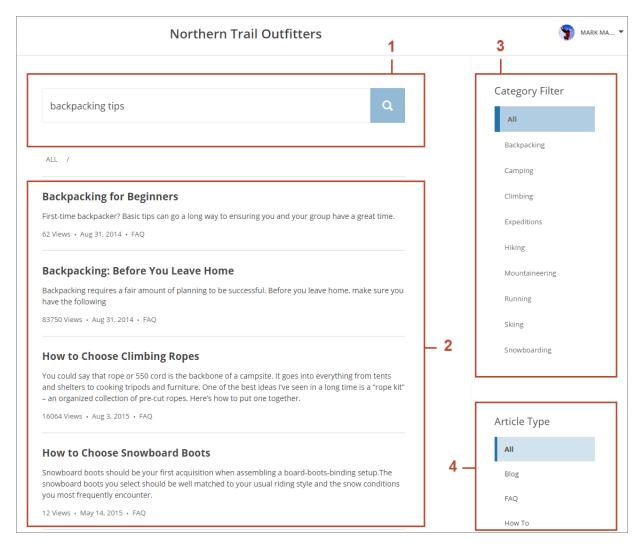
Users reach the Feed Detail page by clicking the time stamp of an item in the case feed.

## My Cases



- User Profile Summary & Image (1) displays a user's profile photo and contact information, and isn't configurable. Users see a Follow button on other users' profiles.
- Case List (2) displays a user's list of cases. Only case numbers are clickable.

#### Search



- Featured Search (1) requires no setup, and lets you specify the number of articles and auto-query suggestions to return. You can also change the placeholder text for the search box and choose not to display a background image for the search box.
  - Note: Featured Search in the Home page uses the expression {!Site.TopLevelCategory} to search based on the top-level category, while Featured Search in the other pages uses the expression {!category} to search within the current category.
- Article List (2) requires no setup, but lets you specify how many articles appear in the list of returned articles.
- Category Filter (3) requires no setup.
- Article Type Filter (4) requires no setup.

### Napili Template's Pages

Napili is a powerful support community template that lets your customers post questions to the community and search for and view articles. If they don't find what they're looking for, they can contact a support agent.

This template takes it to the next level by adding 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 from the community by asking a question—letting 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. And like the other self-service community templates, your customers can use any device with a consistent user experience every time.

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 community, they're also able to ask questions and participate in discussions in the feed. Members in the community can answer questions in the community, just like commenting on a post in Chatter. The person who asked the question or the question's moderator can select a best answer—which is prominently displayed in the feed—allowing other users to quickly and easily find the best response to their question.

Napili has an enhanced profile and navigation experience for logged-in users, as well. 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 community can also access community 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 community.

The Napili template adds the flexibility of topics to organize your community. Topics help you structure a community to quickly guide members to the information that matters most. You can choose navigational topics to provide an easy way for customers to explore the community, and featured topics to highlight current conversations and issues. Trending topics and related topics let members find active discussions and popular content in the community. Member-created topics, meanwhile, let users organize information for each other, creating a personalized experience that boosts community engagement. When setting up the community, you or the community manager associate topics with existing data categories, so your articles appear in the appropriate topics in the community.



**Note:** While the Napili template uses topics to display articles and questions, Knowledge articles are associated with data categories when they are created. To ensure that articles appear in the community, set data category visibility at the profile level for each category you associate with a topic. For instructions on setting default data category visibility, search for "Modifying Default Data Category Visibility" in the Salesforce help.

The User Settings menu lets users manage their personal settings directly in the Napili template. The My Settings menu is available in the profile header for authenticated users. The language, locale, and time zone settings let users localize the community so that they see everything in their own language. The profile visibility setting lets users determine if guest users who aren't logged in to the community can see their profile details. The email notification settings let users control when they receive email based on activity in the community.

This section highlights each page of the Napili template and includes a summary of the components that are contained in each page.

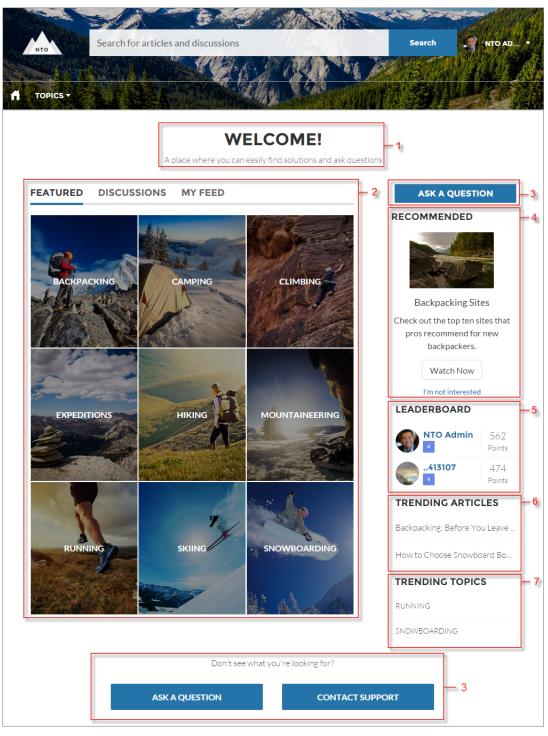
### Shared Page Components



All pages in the Napili template include the template header, which consists of the following components:

- Search Publisher (1) lets your users search for articles and discussions as well as ask questions or contact support when they can't find the information they're looking for.
- Profile Header (2) displays a user's name (or nickname) and profile picture with a drop-down that lets users navigate to and manage their profile, contact support, and log out.
- Navigation Bar (3) lets users select different topics to browse and provides navigation back to the community home page. In Winter '16 and later releases, the Navigation Bar is replaced by the Navigation Menu.

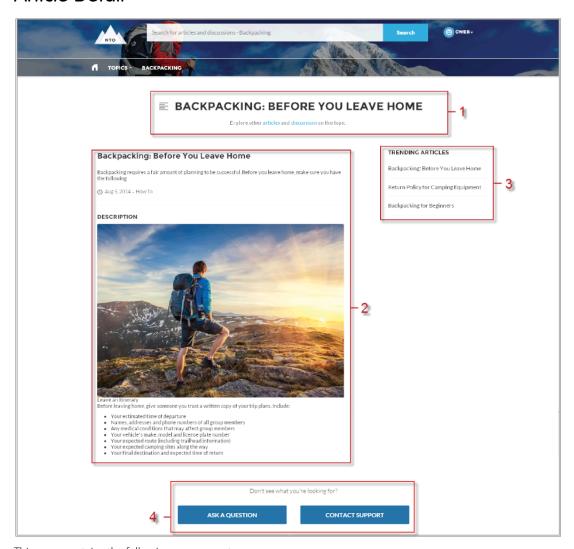
#### Home



- Headline (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- Home Page Tabs (2) requires no setup, but lets you change the labels for the articles and discussions on the home page.
- Ask a Question (3) requires no setup, but lets you change the button's label text.

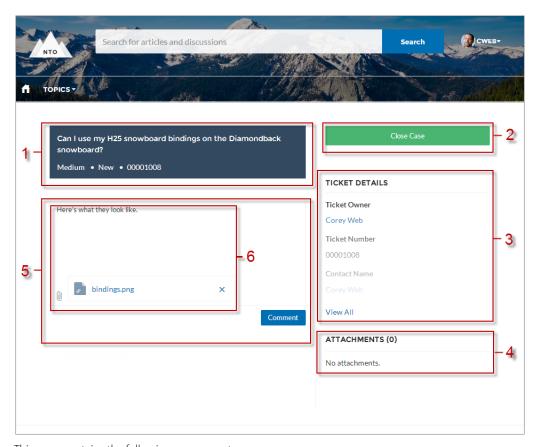
- Recommendations (4) displays recommendations for your community.
- Reputation Leaderboard (5) displays a list of up to 15 community members with the highest reputation points.
- Topic Trending Articles (6) requires no setup, but lets you change the type of topics that appear.
- Trending Topics (7) displays the popular topics in your community.
- Contact Support & Ask Buttons (8) requires no setup, but lets you change the buttons' label text.

#### **Article Detail**



- Headline (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- Article Content (2) requires no setup.
- Topic Trending Articles (3) requires no setup, but lets you change the type of topics that appear.
- Contact Support and Ask Buttons (4) requires no setup, but lets you change the buttons' label text

#### Case Detail



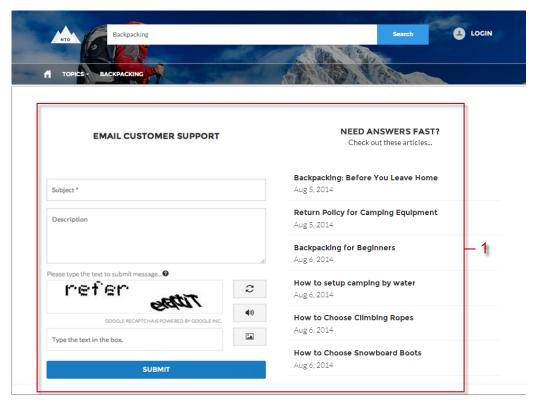
This page contains the following components:

- Case Banner (1) requires no setup.
- Set Case Status Button (2) requires no setup, but lets you specify label text for the status button.
- Case Detail (3) requires no setup.
- Case Attachments (4) requires no setup.
- Case Comments Publisher (5) requires no setup, but lets you specify label text for the title and the button. You can also change the placeholder text for the publisher and choose not to allow users to attach files.
- Case Comments (6) requires no setup.

If you enable the community case feed in your community, you'll replace the Case Comments and Case Comments Publisher components with the Case Feed and Case Feed Publisher components, respectively.

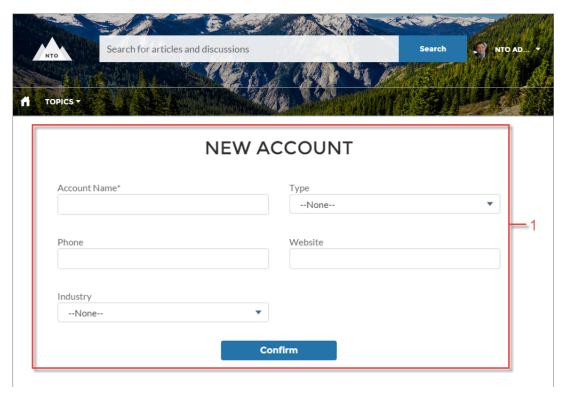
- Case Feed Publisher lets customers create Chatter posts on cases, and must be added to the Case page as part of the community case feed setup process.
- Case Feed displays all case interactions in a chronological feed, including case posts, emails, and related questions. It must be added to the Case page as part of the community case feed setup process.

### **Contact Support**



This page contains the Create Case Form (1), which requires no setup for authenticated users, but lets you change label text and enable authenticated users to attach files to the case. This component searches text as it's being entered into a case, and displays articles based on the typed text. To let guest users create cases, you'll need to set up Web-to-Case and create a case publishing action for guest users. You can also protect your community from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.

## Create Record



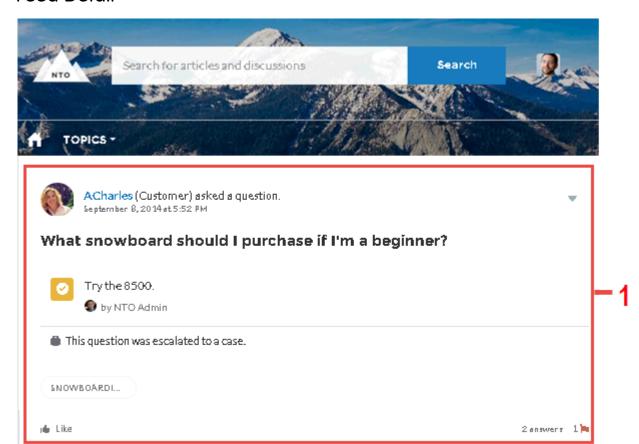
This page contains the Create Record Form, which displays the action layout when a user clicks an action from the Create Record button.

#### **Error**

Oops, something went wrong. Please refresh the page and try again.

This page displays an error message that you configure by changing the text in a Content Block component.

### Feed Detail

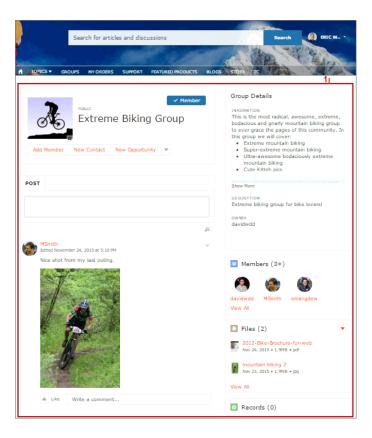


This page contains the following components:

• Feed Post & Comments (1) displays the detailed view of an individual post, comment, or question in the community feed, and isn't configurable.

Users reach the Feed Detail page by clicking a feed item's time stamp.

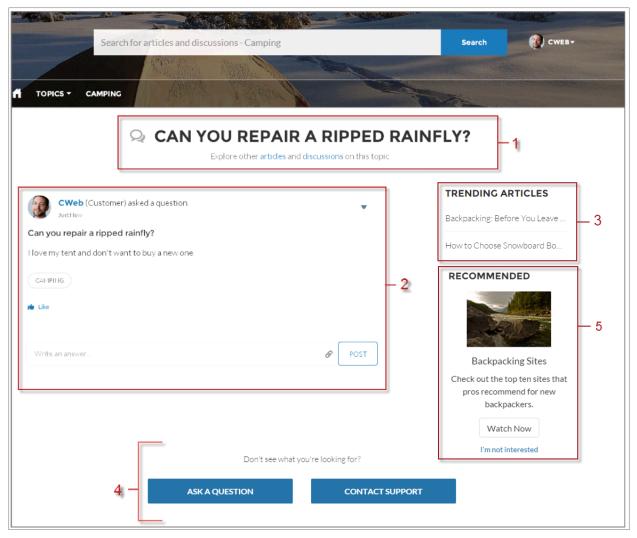
## **Group Detail**



This page contains the following components:

• The Group component displays all the content in the group, including the group banner, description, related lists, and the group feed.

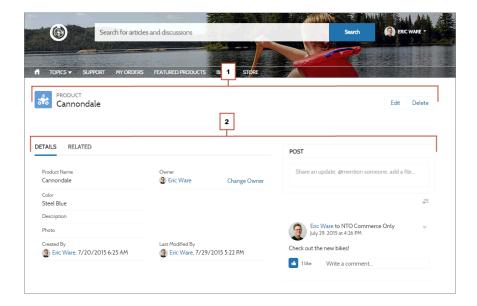
#### **Question Detail**



This page contains the following components:

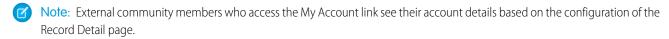
- Headline (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- Feed Post & Comments (2) displays the detailed view of an individual post, comment, or question in the community feed, and isn't configurable.
- Topic Trending Articles (3) requires no setup, but lets you change the type of topics that appear.
- Contact Support and Ask Buttons (4) requires no setup, but lets you change the buttons' label text.
- Recommendations (5) displays recommendations for your community.

#### **Record Detail**

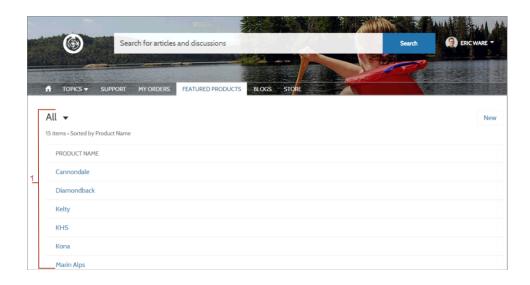


This page contains the following components:

- Record Headline (1) lets you view the record name and the buttons to edit and delete the record. You can modify the fields that display on this component by customizing the Highlights Panel layout for the object.
- Record Information (2) shows detailed information about a record, a list of related records, and the record feed.



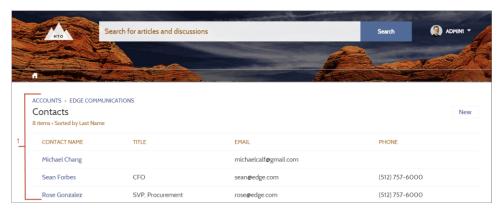
#### **Record List**



This page contains the following component:

• Record List shows a list of records for an object. It also includes a button that allows community members with permissions to create new records.

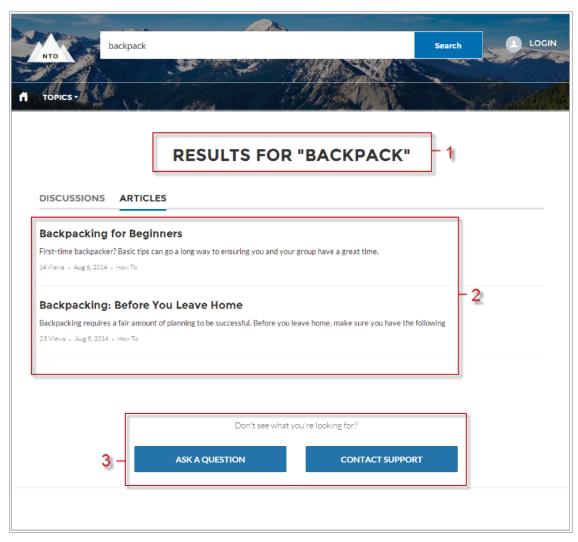
## **Related Record List**



This page contains the following component:

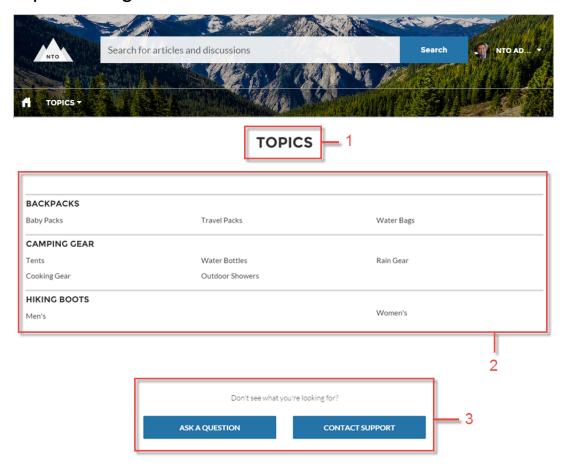
• Related Record List (1) displays a list of records related to an object and a button that lets community members create new records of the same type. This page and component are not customizable.

### Search



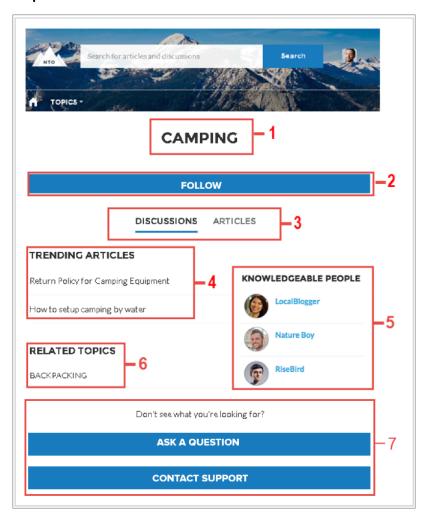
- Headline (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- Search Results (2) requires no setup, but lets you change label text and whether the articles or discussions tab appears first.
- Contact Support and Ask Buttons (3) requires no setup, but lets you change the buttons' label text.

# **Topic Catalog**



- Headline (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles.
- Topic Catalog (2) requires no setup, and pulls in the navigational topics and subtopics you've already set up.

## **Topic Detail**



This page contains the following components:

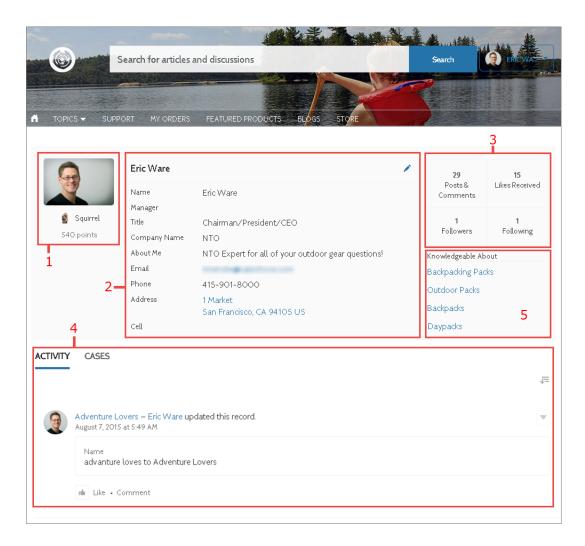
• Headline (1) lets you change the banner text for the links that go to pages showing discussions, topics, and articles. If you have set up navigational subtopics, change the following properties in the property editor to populate topic and subtopics dynamically on the topic detail page:

Property	Details  Enter {!topicName} to retrieve and display the topic name on the topic detail page.		
Title			
Page Type	Enter topic as the page type.		
Show Subtopics	Select this option to display subtopics.		

- Follow Button (2) displays a Follow button on other users' profiles.
- Search Results (3) lets you change label text and whether the articles or discussions tab appears first.
- Topic Trending Articles (4) lets you change the type of topics that appear.

- Knowledgeable People (5) lets you change the label for the component and choose topics from which knowledgeable people are identified.
- Related Topics List (6) lets you change the label for the component.
- Contact Support and Ask Buttons (7) requires no setup, but lets you change the buttons' label text.

#### **User Profile**



- User Profile Image (1) displays a user's reputation level, reputation points, and profile photo, and isn't configurable.
- Follow Button (not shown) displays a Follow button on other users' profiles.
- User Profile Summary (2) displays a user's contact information and isn't configurable.
- User Profile Stats (3) displays a user's Chatter statistics in the community including number of posts and comments, number of likes received, number of people following, and number of people following them.
- User Profile Tabs (4) displays tabs showing a user's Chatter Activity and Cases. When viewing another users' profile, users see only the Activity tab.
- User Profile Knowledgeable About (5) displays topics a user has expertise about. This component is available in Winter '16 and later.

In Spring '16 and later, the User Profile page could alternatively use the User Profile component which includes the User Profile Image, Follow Button, User Profile Detail, User Profile Stats, User Profile Tabs, and User Profile Knowledgeable About components.

### **User Settings**



This page contains User Settings, which requires no setup, but lets users choose their language, location, and time zone. Additionally, they can determine if guest users who aren't logged in to the community can view their profile details. Lastly, users can choose which activities they want to receive email about.

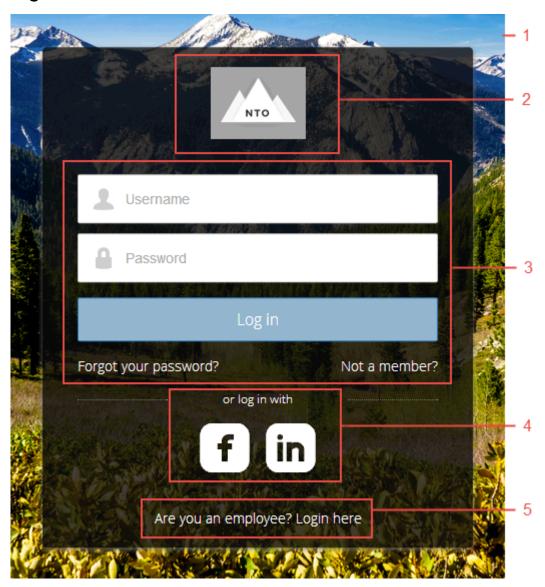
## Login Template Pages

The Login template provides a customized user login experience that can include your company's branding. This template gives users advanced login options to change their password, complete a self-registration form as a new user, or log in with a third-party account. Users who use single sign-on to log in to your community do not see this login page.

You can customize the login page in several ways. For more information, see Getting Started with Communities.

This section highlights each page of the Login template and includes a summary of the components that are contained in each page.

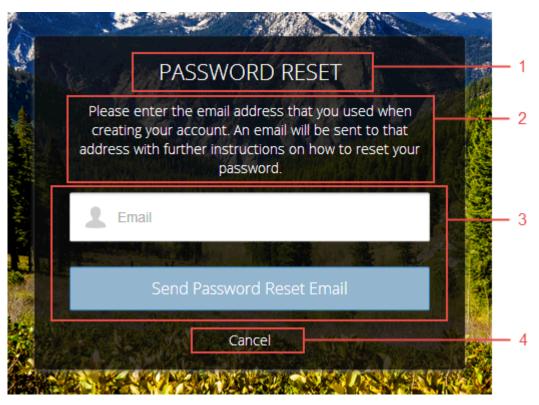
#### Login



- Background (1) gives your community's login pages a unique appearance.
- Community Logo (2) identifies your community brand. This is set in the Administration Settings for the community. For more
  information, see "Customizing Communities Login" in Getting Started with Communities.

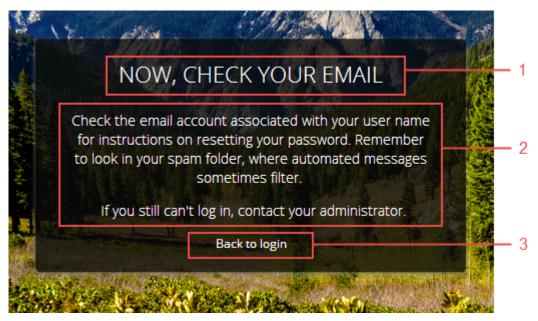
- Login Form (3) allows users to provide their username and password. This form includes links to the Forgot Password and Self Register pages so that users who are having trouble logging in or who don't have current accounts have a self-service option within this page. If the community administrator deselects the username and password checkbox on the **Administration** > **Login & Registration** page in Community Management, the Login Form doesn't appear in the published community. For more information, see "Customizing Communities Login" in *Getting Started with Communities*.
- Social Login (4) gives users the ability to log in by using their accounts from identity providers such as Facebook<sup>©</sup> or LinkedIn<sup>©</sup>.
- Employee Login (5) provides a link to log in for users with accounts in the parent organization.

### Forgot Password



- Rich Text (1) identifies the page.
- Rich Text (2) provides instructions for users.
- Forgot Password Form (3) provides a field to collect a username, such as an email address, and a button to submit the request to reset the password.
- Rich Text (4) gives users a Cancel link for returning to the Login page.

### **Check Password**



This page contains the following components.

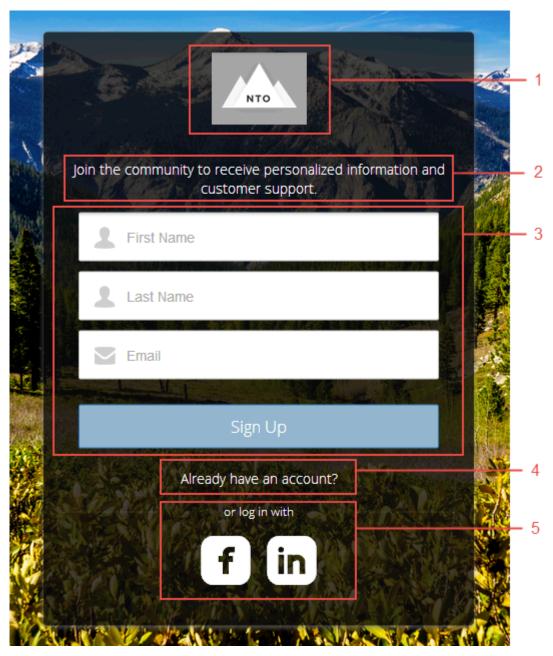
- Rich Text (1) identifies the page.
- Rich Text (2) provides instructions for users.
- Rich Text (3) gives users a link to return to the Login page.

### **Login Error**



This page displays an error message that you configure by changing the text in a Rich Text component.

### Register



- Community Logo (1) to identify your community brand. This is set in the Administration Settings for the community. For more information, see "Customizing Communities Login" in *Getting Started with Communities*.
- Rich Text (2) provides instructions for users.
- Self-Registration Form (3) provides fields for users to enter their own information. The fields can be customized to collect various information.
- Rich Text (4) gives users a chance to return to the login page to log in with an existing account.
- Social Login (5) gives users the option to log in by using their accounts from third-party identity providers, such as Facebook<sup>©</sup> or Linkedln<sup>©</sup>, instead of creating another account.

# Which Components Can I Use with Each Template?

The Koa, Kokua, Napili, and Aloha templates are each composed of pages, which in turn are made up of customizable components. Consult this table to find out which templates each component can be used in, and when it became available.

1 Tip: The Page Editor tab in Community Builder lists all components that can be added to the page that you're editing.

Communities that use the Salesforce Tabs + Visualforce template don't use Lightning components.

Component	Koa	Kokua	Napili	Available in Versions
Article Content			~	All versions
Article List	~	~		All versions
Article Type Filter	~	~		All versions
Article View	~	~		All versions
Ask Button			~	All versions
Back Button	~	~		All versions
Case Attachments	~	~	~	All versions
Case Banner	~	~	~	All versions
Case Comments	~	~	~	All versions
Case Comments Publisher	~	~	~	All versions
Case Detail	~	~	~	All versions
Case Feed	~	~	~	Summer '15 and later
Case Feed Publisher	~	~	~	Summer '15 and later
Case List	~	~	~	All versions
Category Filter	~	~		All versions
Category Navigation	~	~		All versions
Contact Support & Ask Buttons	~	<u>~</u>	1	All versions
Contact Support & Ask Buttons			~	Winter '16 and later
Create Case Form	~	~	~	All versions
Create Record Button			<u>~</u>	Winter '16 and later

Create Record Form  Expanded Category Navigation  Featured Data Categories  Featured Data Categories  Featured Search  All versions  Feed  Winter "16 and later  Feed Compact  Winter "16 and later  Feed Post & Comments  Winter "16 and later  Feed Post & Comments  Winter "16 and later  Feed Publisher  Winter "16 and later  Feolow Button  Group  Winter "16 and later  Group Banner  Group Detail  Group Belated List  Winter "16 and later  All versions  Knowledgeable People  Winter "16 and later  Navigation Menu  Winter "16 and later  Profile Header  Winter "16 and later  Profile Header  Winter "16 and later  Wi	Component	Koa	Kokua	Napili	Available in Versions
Navigation Featured Data Categories All versions Feed Compact Winter '16 and later Feed Compact Feed Post & Comments Feed Post & Comments Feed Publisher Feed Publisher All versions Feed Post & Comments All versions Feed Post & Comments Feed Publisher Feed Post & Comments Feed Post &	Create Record Form			~	Winter '16 and later
Feed Winter '16 and later Feed Compact Winter '16 and later Feed Post & Comments Winter '16 and later Feed Publisher Winter '16 and later Feed Publisher Winter '16 and later Feilow Button Summer '15 and later Group Winter '16 and later Group Winter '16 and later 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 Home Page Tabs Mil versions Knowledgeable People Winter '15 and later Language Picker Winter '15 and later Navigation Bar Before Winter '16 Navigation Menu Winter '16 and later Profile Header Mil versions Recommendations Winter '16 and later Record Banner Winter '16 and later Record Information Tabs Winter '16 and later Record Belated List Winter '16 and later Record Information Tabs Winter '16 and later Record Information Tabs Winter '16 and later Record Information Tabs Winter '16 and later Record Related List Winter '16 and later		~	~		All versions
Feed Compact  Feed Compact  Feed Post & Comments  Winter '16 and later  Feed Publisher  Follow Button  Group  Winter '16 and later  Follow Button  Winter '16 and later  Follow Button  Winter '16 and later  Group  Winter '16 and later  Group Banner  Winter '16 and later  Group Detail  Winter '16 and later  Group Related List  Winter '16 and later  All versions  Knowledgeable People  Winter '16 and later  Language Picker  Winter '16 and later  Winter '16 and later  Navigation Bar  Before Winter '16  Navigation Menu  Winter '16 and later  Profile Header  Winter '16 and later  Record Banner  Winter '16 and later  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record Related List  Winter '16 and later	Featured Data Categories	~	~		All versions
Feed Post & Comments  Feed Post & Comments  Winter '16 and later  Feed Publisher  Winter '16 and later  Follow Button  Group  Winter '16 and later  Group All Winter '16 and later  Group Banner  Winter '16 and later  Group Detail  Winter '16 and later  Group Related List  Winter '16 and later  Winter '16 and later  Winter '16 and later  Winter '16 and later  All versions  Home Page Tabs  Winter '16 and later  Language Picker  Winter '15 and later  Language Picker  Winter '16 and later  Winter '16 and later  Winter '16 and later  Winter '16 and later  All versions  Knowledgeable People  Winter '16 and later  Record Banner  Winter '16 and later  Record Banner  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record List  Winter '16 and later	Featured Search	~	~		All versions
Feed Post & Comments  Winter '15 and later Feed Publisher  Winter '16 and later Follow Button  Group  Winter '16 and later  Group Banner  Winter '16 and later  Group Detail  Winter '16 and later  Group Related List  Winter '16 and later  Winter '16 and later  Winter '16 and later  All versions  Home Page Tabs  All versions  Knowledgeable People  All versions  Knowledgeable People  All versions  Winter '16 and later  Volumer '15 and later  Navigation Bar  Before Winter '16  Navigation Menu  Winter '16 and later  Profile Header  Winter '16 and later  Record Banner  Record Banner  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record Related List  Winter '16 and later	Feed			<b>✓</b>	Winter '16 and later
Feed Publisher  Follow Button  Summer '15 and later  Group  Winter '16 and later  Group Banner  Winter '16 and later  Group Detail  Winter '16 and later  Group Related List  Winter '16 and later  Group Related List  Winter '16 and later  Winter '16 and later  All versions  Knowledgeable People  Summer '15 and later  Winter '16 and later  All versions  Winter '16 and later  Winter '16 and later  Winter '16 and later  Winter '16 and later  Record Banner  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record Related List  Winter '16 and later	Feed Compact			<b>✓</b>	Winter '16 and later
Follow Button  Summer '15 and later  Group  Winter '16 and later  Group Detail  Winter '16 and later  Group Related List  Winter '16 and later  Headline  Headline  Home Page Tabs  All versions  Knowledgeable People  Summer '15 and later  Language Picker  Winter '16 and later  Winter '16 and later  Navigation Bar  Before Winter '16  Navigation Menu  Winter '16 and later  Profile Header  Winter '16 and later  Record Banner  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record Related List  Winter '16 and later	Feed Post & Comments	~	~	~	Summer '15 and later
Group Winter '16 and later  Group Detail Winter '16 and later  Group Related List Winter '16 and later  Headline All versions  Home Page Tabs All versions  Knowledgeable People Summer '15 and later  Language Picker Winter '16 and later  Navigation Bar Before Winter '16  Navigation Menu Winter '16 and later  Profile Header Winter '16  Record Banner Winter '16 and later  Record Information Tabs Winter '16 and later  Record List Winter '16 and later  Record Related List Winter '16 and later	Feed Publisher			~	Winter '16 and later
Group Banner  Group Detail  Winter '16 and later  Group Related List  Winter '16 and later  Headline  Home Page Tabs  Knowledgeable People  Summer '15 and later  Language Picker  Winter '16 and later  Navigation Bar  Winter '16 and later  Navigation Menu  Winter '16 and later  Record Banner  Winter '16 and later  Record Information Tabs  Record Related List  Winter '16 and later	Follow Button			<b>✓</b>	Summer '15 and later
Group Detail  Winter '16 and later  Group Related List  Winter '16 and later  Headline  All versions  Home Page Tabs  Vinter '15 and later  Language Picker  Winter '16 and later  Winter '16 and later  Winter '16 and later  Navigation Bar  Before Winter '16  Navigation Menu  Winter '16 and later  Profile Header  Vinter '16 and later  Record Banner  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record Related List  Winter '16 and later	Group			~	Winter '16 and later
Group Related List  Headline  All versions  Home Page Tabs  All versions  Knowledgeable People  Language Picker  Winter '16 and later  Navigation Bar  Before Winter '16  Navigation Menu  Winter '16 and later  Profile Header  All versions  Recommendations  Record Banner  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record List  Winter '16 and later	Group Banner			~	Winter '16 and later
Headline  All versions  All versions  Knowledgeable People  Summer '15 and later  Language Picker  Winter '16 and later  Navigation Bar  Before Winter '16  Navigation Menu  Winter '16 and later  Profile Header  All versions  Recommendations  Summer '15 and later  Record Banner  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record Related List  Winter '16 and later	Group Detail			~	Winter '16 and later
Home Page Tabs  Knowledgeable People  Summer '15 and later  Language Picker  Winter '16 and later  Navigation Bar  Winter '16 and later  Navigation Menu  Winter '16 and later  Profile Header  All versions  Recommendations  Summer '15 and later  Record Banner  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record List  Winter '16 and later  Record Related List  Winter '16 and later	Group Related List			~	Winter '16 and later
Knowledgeable People  Language Picker  Winter '16 and later  Navigation Bar  Before Winter '16  Navigation Menu  Winter '16 and later  Profile Header  All versions  Recommendations  Summer '15 and later  Record Banner  Winter '16 and later  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record List  Winter '16 and later  Record Related List  Winter '16 and later	Headline			<b>✓</b>	All versions
Language Picker  Navigation Bar  Before Winter '16  Navigation Menu  Winter '16 and later  Profile Header  All versions  Recommendations  Summer '15 and later  Record Banner  Winter '16 and later  Winter '16 and later  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record Related List  Winter '16 and later	Home Page Tabs			~	All versions
Navigation Bar  Winter '16 and later  Profile Header  Recommendations  Record Banner  Record Information Tabs  Record List  Record Related List  Winter '16 and later	Knowledgeable People			~	Summer '15 and later
Navigation Menu  Profile Header  All versions  Recommendations  Summer '15 and later  Winter '16 and later  Winter '16 and later  Winter '16 and later  Record Information Tabs  Winter '16 and later  Record List  Winter '16 and later  Winter '16 and later  Winter '16 and later	Language Picker			~	Winter '16 and later
Profile Header  Recommendations  Summer '15 and later  Winter '16 and later  Record Information Tabs  Winter '16 and later  Winter '16 and later  Winter '16 and later  Winter '16 and later  Record Related List  Winter '16 and later	Navigation Bar			~	Before Winter '16
Recommendations  Record Banner  Winter '16 and later  Record Information Tabs  Winter '16 and later  Winter '16 and later  Winter '16 and later  Winter '16 and later  Record Related List  Winter '16 and later	Navigation Menu			~	Winter '16 and later
Record Banner  Record Information Tabs  Winter '16 and later  Record Related List  Winter '16 and later	Profile Header	~	~	~	All versions
Record Information Tabs  Winter '16 and later	Recommendations			~	Summer '15 and later
Record List  Winter '16 and later  Winter '16 and later  Winter '16 and later	Record Banner			~	Winter '16 and later
Record Related List  Winter '16 and later  Control 115 and 125	Record Information Tabs			~	Winter '16 and later
	Record List			~	Winter '16 and later
Related Topics List Spring '15 and later	Record Related List			~	Winter '16 and later
	Related Topics List			~	Spring '15 and later

Component	Koa	Kokua	Napili	Available in Versions
Reputation Leaderboard			~	Spring '15 and later
Rich Text	~	~	~	Winter '16 and later
Scroll To			~	All versions
Search	~	~		All versions
Search Publisher			~	All versions
Search Results			~	All versions
Set Case Status Button	~	~	~	All versions
Toggle Button	~	~		All versions
Topic Catalog			~	Spring '16 and later
Trending Articles	~	~		All versions
Trending Articles by Topic			~	All versions
Trending Topics			~	Spring '15 and later
User Profile			~	Spring '16 and later
User Profile Detail			~	Winter '16 only
User Profile Image	~	~	~	All versions
User Profile Knowledgeable About			<b>✓</b>	Winter '16 and later
User Profile Related List			~	Spring '16 and later
User Profile Stats			~	Spring '15 and Summer '15
User Profile Summary	~	<u>~</u>	~	All versions
User Profile Summary & Image	~	~		Winter '16 and later
User Profile Tabs			~	Spring '15 and later
User Settings			~	Spring '15 and later
CUSTOM COMPONENTS	S			
Custom Lightning Components	~	<b>✓</b>	~	Winter '16 and later



<sup>1</sup> Contact Support is included as part of the Contact Support & Ask Buttons component.

# **Login Template Components**

Component	Available in Versions
Background	All versions
Set Up the Content Block	Before Winter '16
Custom Code	Before Winter '16
Employee Login Link	All versions
Forgot Password	All versions
Login Form	All versions
Self-Registration Self-Registration	All versions
Social Login	All versions

### **Article Content**

The Article Content component lets users view and vote on an individual article after they've selected it from search results or browsing topics.



Note: Before Spring '16, this component was named Single Article View.

The article's title, latest revision date, and article type appear with the body of the article. Users can follow navigation links to browse other topics.



**Note:** When a user views an article that's been returned from a Web search, the navigation breadcrumbs show the path to the first topic associated with the article.

If you enable article voting for this component, authenticated users see a prompt to vote below each article. Users can give articles a thumbs up or thumbs down vote. If your organization uses star rating 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 version of community templates.

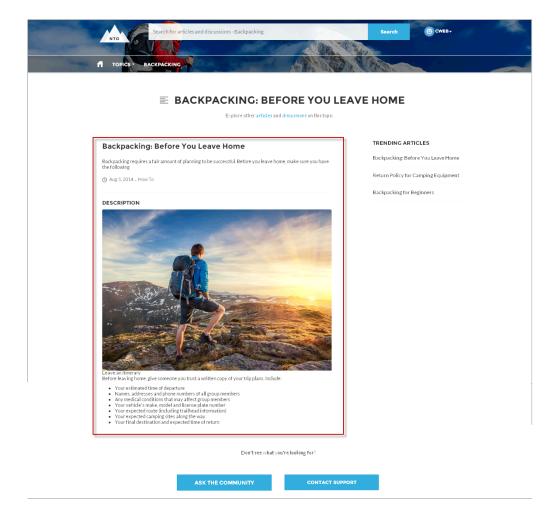
When a user votes on an article, a confirmation message appears next to their vote. The user can return to the article later to view their vote, but can't change it or see voting data from other community members. You can view an article's voting data at the top of the article in your organization.

- 1. Select the **Article Content** component in the page you're configuring.
- **2.** In the Property Editor, configure properties for the component:

Property	Details
URL Name	This value is retrieved when the individual article is selected.
Enable Article Voting	Select this option, which by default is not selected, to let users vote on articles. This functionality is available only in the Winter '16 and later versions of community templates.

Property	Details
Voting Prompt Text	Enter the text that appears above the voting buttons. The default text is Was this article helpful? This functionality is available only in the Winter '16 and later versions of community templates.
Voting Confirmation Text	Enter the text that appears when a user votes on an article. The default text is Thanks for voting. This functionality is available only in the Winter '16 and later versions of community templates.

**Example:** Sample Article Content component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

## **Article List**

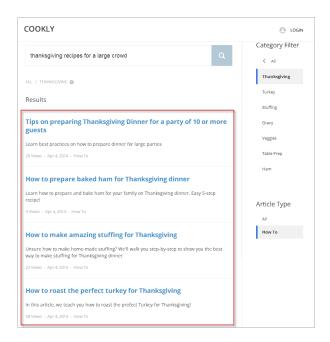
The Article List component lets users view articles that result from a search or from filtering without needing to leave the page.

The list includes the name and the type of article, its most current revision date, as well as how many views it's received. The list of articles can be filtered using the Article Type Filter component. The component also includes a breadcrumb component with navigation links, and a button that controls the appearance of the right menu for tablets and mobile display.

- 1. Select the Article List component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Page Size	Enter the number of articles per page of the list. The default is 25.
Article Type	Specify the type of article to appear in the list.
Search Term	Leave this field blank. It's the field in which users type their search queries.

**Example:** Sample Article List component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

# **Article Type Filter**

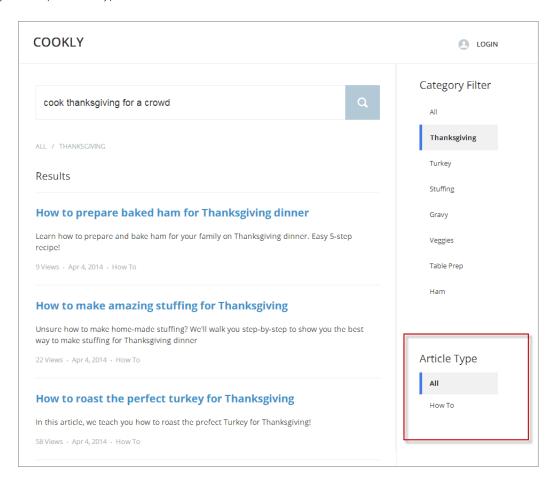
The Article Type Filter component lets users filter the article list based on the selected article type after they've viewed search results.

An article's type determines the type of content it contains, its appearance, and which users can access it.

Select the Article Type Filter component in the page you're configuring.
 There are no properties to set for this component.

**(1)** 

**Example:** Sample Article Type Filter:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Article View**

The Article View 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. Users can click Back to return to the article list or follow navigation links to browse the parent categories.



**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. Users can give articles a thumbs up or thumbs down vote. If your organization uses star rating 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 version of community templates.

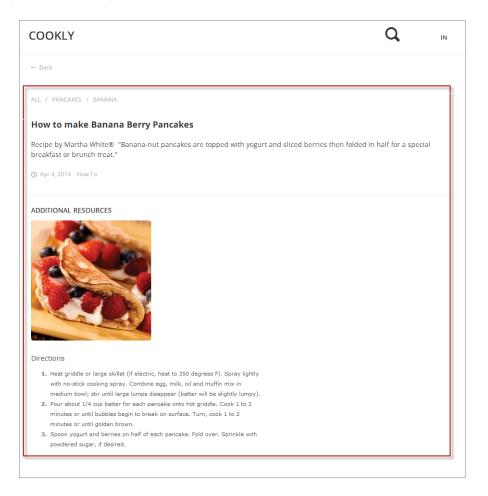
When a user votes on an article, a confirmation message appears next to their vote. The user can return to the article later to view their vote, but can't change it or see voting data from other community members. You can view an article's voting data at the top of the article in your organization.

- 1. Select the **Article View** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
URL Name	This value is retrieved when the individual article is selected.
Enable Article Voting	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 community templates.
Voting Prompt Text	Enter the text that appears above the voting buttons. The default text is Was this article helpful? This functionality is available only in the Winter'16 and later versions of community templates.
Voting Confirmation Text	Enter the text that appears when a user votes on an article. The default text is Thanks for voting. This functionality is available only in the Winter '16 and later versions of community templates.

0

**Example**: Sample Article View component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Ask Button

The Ask Button component lets users click a button and ask a question that is published to the community. Guest users must log in to ask questions and participate in discussions.



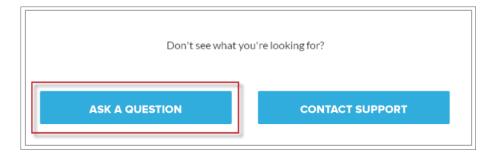
Note: Before Spring '16, this component was named Ask the Community.

Napili 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 if you want, you can remove one or use different text for each button.

- 1. Select the **Ask Button** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Button Label	Enter the text you'd like to display on the button that users can click to ask a question. The default text is Ask a Question.





SEE ALSO:

Which Components Can I Use with Each Template?

# **Back Button**

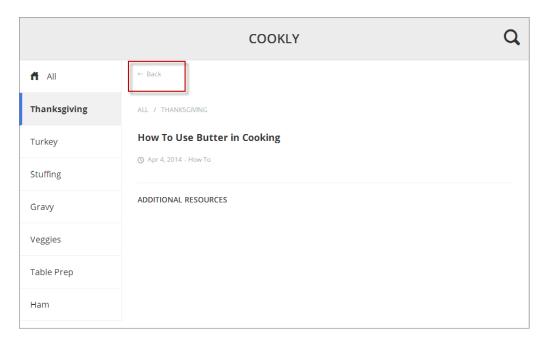
The Back Button component displays a button that lets users navigate to the previous context.

1. Select the **Back Button** component in the page you're configuring.

There are no properties to set for this component.

0

**Example**: Sample Back Button component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

## Case Attachments

The Case Attachments component lets users view a list of all attachments associated with a case.

Mobile device users can expand and collapse the list of attachments when they are looking at the details of their case.



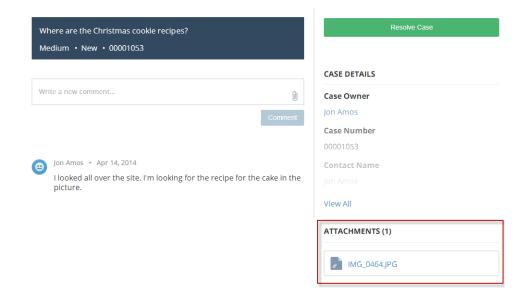
### Note:

- You can't attach a file to a case while in Preview mode in Community Builder. When the community is published, you can attach files to cases.
- For users to see case attachments, the Case page layout and case record types for their profile must include the Attachments related list.
- 1. Select the Case Attachments component in the page you're configuring.
- **2.** In the Property Editor, configure properties for the component:

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.

**(3)** 

**Example**: Sample Case Attachments component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Case Banner

The Case Banner component lets users see a case's status, case ID, and other summary information.



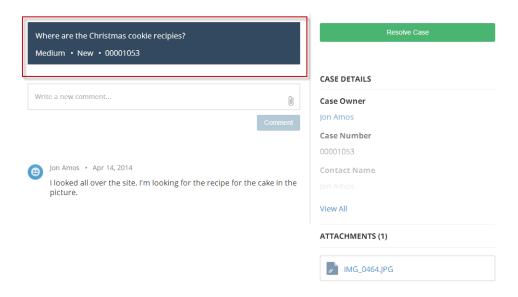
Note: Before Spring '16, this component was named Case Highlights.

- 1. Select the Case Banner component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

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.

0

**Example**: Sample Case Banner component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Case Comments

The Case Comments component shows a list of all the comments that a customer and an agent have added to the case.

If an attachment has been uploaded with a comment it is shown separately in the Attachments component.



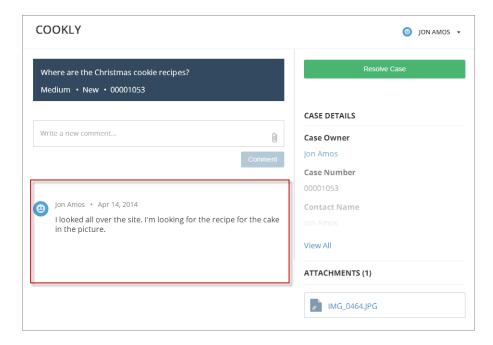
**Note**: For users to see case comments, the Case page layout and case record types for their profile must include the Case Comments related list.

- 1. Select the **Case Comments** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

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.

0

**Example:** Sample Case Comments component:



SEE ALSO:

Which Components Can I Use with Each Template?

### 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.



Note: Before Spring '16, this component was named Case Publisher.

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.

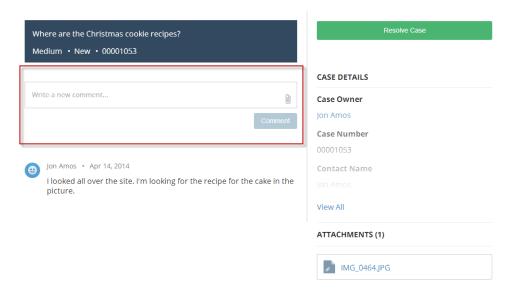
By default, users can attach any supported file type that is 5 MB or less. You can restrict the types of files that users can upload by changing the default values for content types on the Library tab.

- 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 <b>Write a new comment</b> .

Property	Details
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 Template?

## Case Detail

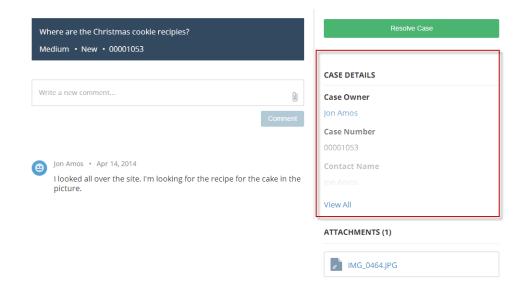
The Case Detail component lets users see all of the details of their case in a collapsible section.

- 1. Select the Case Detail component in the page you're configuring.
- **2.** In the Property Editor, configure properties for the component:

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.

**(3)** 

**Example:** Sample Case Detail component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Case Feed

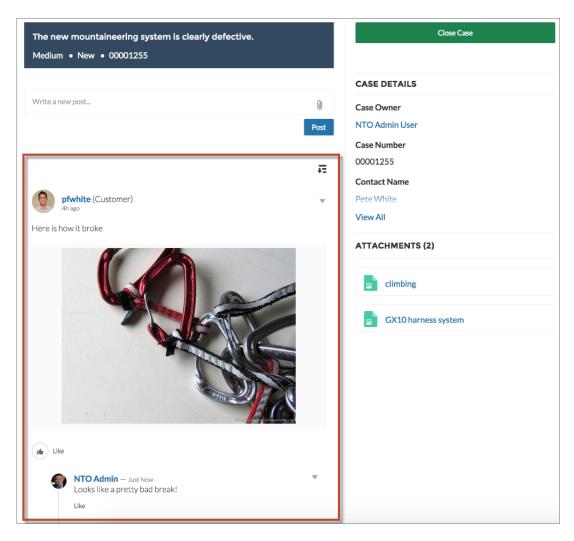
The Case Feed component shows a Chatter feed of all case interactions, including Chatter posts, case emails, questions related to the case, and attachments.

Comments and attachments on posts appear inline below the post for desktop and tablet users, and attachments are also shown separately in the Attachments component.

- (1) Important: Make sure to enable the community case feed so users see supported case interactions in their feed. For details, see Set Up the Community Case Feed.
- 1. Select the Case Feed component in the page that you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Case ID	Enter this value: {!recordId}

**Example:** Sample Case Feed component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Case Feed Publisher

The Case Feed Publisher component lets customers create Chatter posts on cases and upload attachments from any of their devices.

Note: Before Spring '16, this component was named Case Chatter Publisher.

Attachments are shown in the Attachments component. By default, users can attach any supported file type that is 2 GB or less.

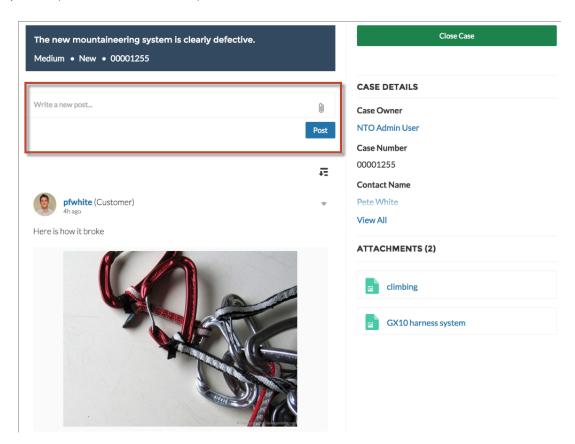
### Important:

- Make sure to enable the community case feed so users see supported case interactions in their feed. For details, see Set Up the Community Case Feed.
- If an agent posts on a customer's case within a Napili community, the post is only visible to other internal users. To ensure that customers see agent posts, agents should use the Community action in the console.

- 1. Select the Case Feed Publisher component in the page that you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Case ID	Enter this value: {!recordId}
Publisher Placeholder Text	Text that appears in the search bar. The default value is <b>Write a</b> new post
Mobile Header Text	Text that appears as the header for mobile users. Mobile and tablet see the text as the header for the post text area.
Can Attach Files	Lets users attach a file to the post.
Post Button Label	Text for the button that submits the post.

**Example**: Sample Case Feed Publisher component:



### SEE ALSO:

Which Components Can I Use with Each Template?

### Case List

The Case List component displays a list of the user's cases. Only authenticated users can see a list of the cases that they've created.



You can select the fields to display by editing the Cases list view.

- Note: The name of the first column in Case List displays as the case title on mobile devices. We recommend using Subject as the first column so mobile users can easily scan their cases. To change the column order in the Case List component, edit the case list view that your organization has assigned to it. By default, the Case List component uses the All Open Cases list view from Salesforce.
- 1. Select the Case List component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Case Filter Name or ID	Enter the name of the list view that displays cases.
	Note: 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'd like to display on the button that users can click to create a case. The default text is Create Case.





SEE ALSO:

Which Components Can I Use with Each Template?

# **Category Filter**

The Category Filter component lets users filter the article list based on selected data categories so that they can see articles from those categories only.

Users can filter the Article View by selecting one or more data categories.

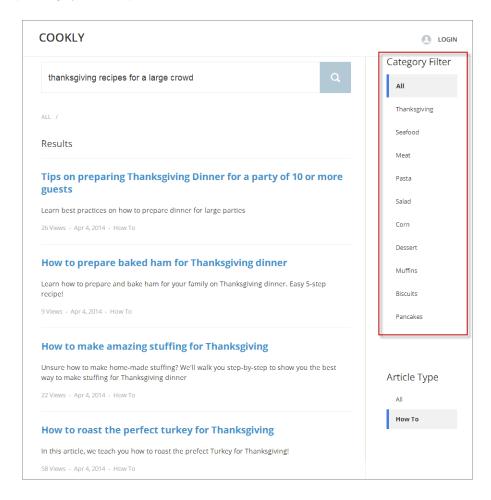
- 1. Select the Category Filter component in the page you're configuring.
- **2.** In the Property Editor, configure properties for the component:

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.

3.

**(3)** 

**Example:** Sample Category Filter component:



SEE ALSO:

Which Components Can I Use with Each Template?

## **Category Navigation**

The Category Navigation component shows a list of child categories for a selected parent category.

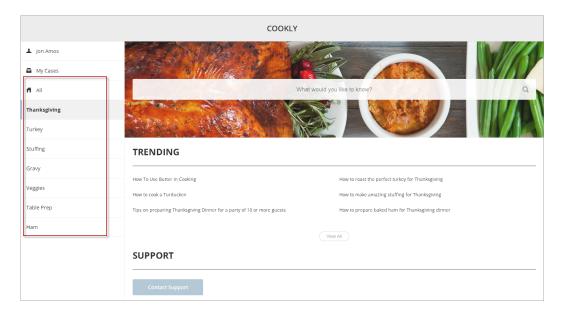
Users can click the child category to view the articles that are associated with it. For long lists of categories, users can view all of the categories and collapse the list to show fewer categories.

- 1. Select the **Category Navigation** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.

Property	Details
Auto-Collapse	Select the checkbox to have the category navigation component collapse automatically after a category is selected.

**Example**: Sample Category Navigation component:



SEE ALSO:

Which Components Can I Use with Each Template?

# Contact Support & Ask Buttons

The Contact Support & Ask Buttons component adds two buttons to the page: one that lets users click a button to create a case, and another that allows members ask a question and publish it to the community. 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. All members must be logged in to ask the community a question.



**Note**: Guest users don't have the option to attach files when creating a case.

- 1. Select the **Contact Support & Ask Buttons** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Header Label	The text you'd like to display at the top of the component.
Ask Community Label	The text you'd like to display on the button that members can click to ask a question from the community. The default text is Ask a Question.

Property	Details
Contact Support Label	The text you'd like to display on the button that users can click to create a case. The default text is Contact Support.



Example: Sample Contact Support & Ask Buttons component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Contact Support & Ask Buttons**

The Contact Support & Ask Buttons component includes two buttons, one to ask a question of the community, and another to contact support by creating a case.



Note: Before Spring '16, this component was named Call to Action.

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.

- 1. Select the **Contact Support & Ask Buttons** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Header Label	Text that displays at the top of the section that includes both buttons. The default text is Don't see what you're looking for?.
Ask Community Label	Text that appears on the button users click to start discussions in the community. The default text is Ask A Question.
Contact Support Label	Text that displays on the button that users click to contact support by creating a case. The default text is Contact Support.



**Example:** Sample Contact Support & Ask Buttons component:



SEE ALSO:

Which Components Can I Use with Each Template?

### 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 the user doesn't see an answer, they can contact support for help. You can also protect your community from spammers by adding a reCAPTCHA widget that guest users must complete before they create a case.



Note: Before Spring '16, this component was named Case Creation.



**Note:** When you configure the case page layout for your community, make sure to specify that some of the fields are required. Adding required fields to the layout ensures that customers don't accidentally submit cases with empty fields.

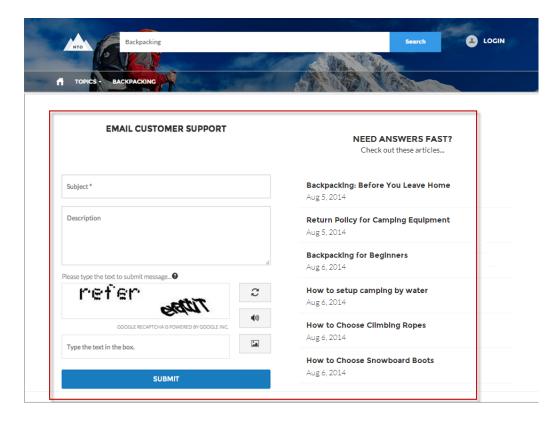
- 1. Select the **Create Case Form** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
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.
Header Title	Text that displays at the top of the page customers use to create a case. The default text is Email Customer Support.
Confirmation Message Title	Text that appears as the title of the message confirming that the case has been created. For example, 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.
Signed-In User Case Action	The name of the quick action that creates cases for authenticated users. Use the action layout editor to specify which fields to include in the layout.
Guest User Case Action	The name of the action that creates cases for unauthenticated users. Use the action layout editor to specify which fields to include in the layout.
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 organization.
Number of Articles	Number of articles that display in the component.
Deflection Banner Text	Text that displays as the title of the deflection area of the page. The default for this field is Need Answers Fast?.

Property	Details
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 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.
	Note: To use Google's reCAPTCHA service, go to the Google reCAPTCHA website, register your domain, and receive a secret and site key pair. For details on which languages are supported in the widget, see the reCAPTCHA website. Google reCAPTCHA is a resource provided by Salesforce to support its users and partners, but is not considered part of our Services for purposes of the salesforce.com Master Subscription Agreement.
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.
	Note: Make sure that you thoroughly test the reCAPTCHA widget in your production organization.

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**Example**: Sample Create Case Form component:



SEE ALSO:

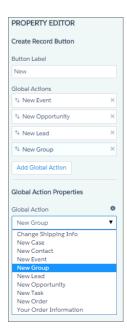
Which Components Can I Use with Each Template?

### **Create Record Button**

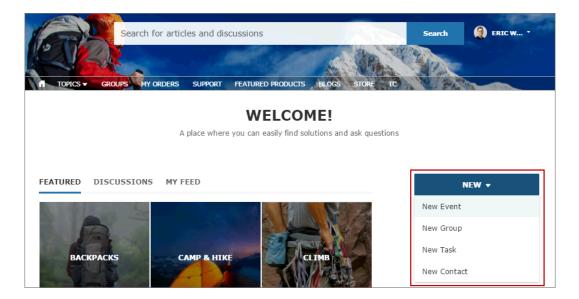
Use the Create Record Button component to allow community members to create records using global actions.

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 drop-down list. When a community 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 could add this to the Home page to make it easy for community 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 below.
  - 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 in the community.



**Example:** Sample Create Record Button component on a community 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 community member clicks an action from the Create Record button in your community, 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.



**Example**: Sample Create Record Form component.

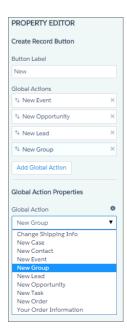


### Create Record Button

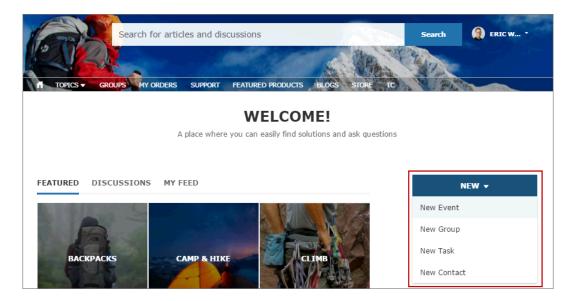
Use the Create Record Button component to allow community members to create records using global actions.

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 drop-down list. When a community 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 could add this to the Home page to make it easy for community 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 below.
  - 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 in the community.



**Example:** Sample Create Record Button component on a community home page.



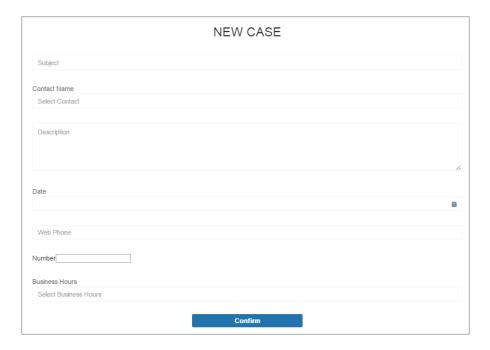
### Create Record Form

The Create Record Form component displays the action layout when a user clicks an action from the Create Record button.

When a community member clicks an action from the Create Record button in your community, 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.



**Example**: Sample Create Record Form component.



## **Custom Lightning Components**

 $Incorporate\ custom\ Lightning\ components\ in\ your\ community\ design\ in\ Community\ Builder.$ 

To use custom Lightning components in your community:

- Enable Lightning components. To do so, from Setup, enter Lightning Components in the Quick Find box, select Lightning Components, and then select Enable Lightning Components.
- Implement each component from the Developer Console as shown in this example:
   <aura:component</li>

implements="forceCommunity:availableForAllPageTypes"
access="global">

 Include a design resource named componentName.design with your Lightning component bundle. This allows the component's properties to be editable in Community Builder.



**Note:** For help with developing custom Lightning components, see the Lightning Components Developer's Guide and the Lightning Components Cheat Sheet.

### **EDITIONS**

Available in: Salesforce Classic

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

### USER PERMISSIONS

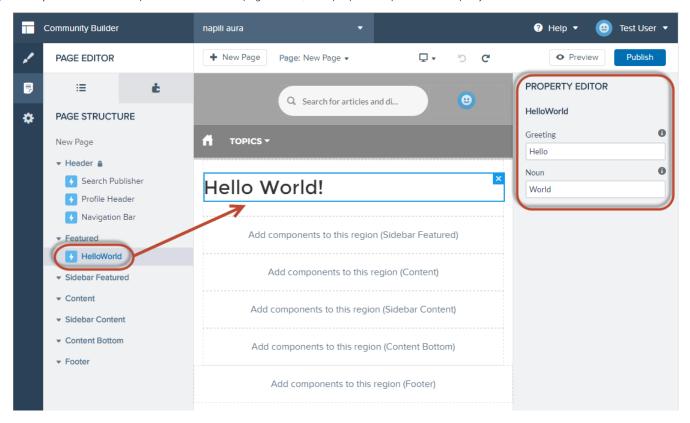
To customize or publish a community:

 "Create and Manage Communities

Custom Lightning components behave just like community template components. Drag and drop the component to the page canvas. To edit its properties, select the component on the page canvas, and then make changes in the Property Editor.

Custom components appear in the Page Editor along with your template's components.

**Example:** A custom component added to the page canvas, with properties open in the Property Editor:



# **Expanded Category Navigation**

The Expanded Category Navigation component organizes articles based on a hierarchy of categories.

Users can select a top-level category and then view the related categories and subcategories as they're browsing for articles. Then they can click the child category to view the articles that are associated with it. For long lists of categories, users can expand the list to view all of the categories and then collapse it to make it more compact.

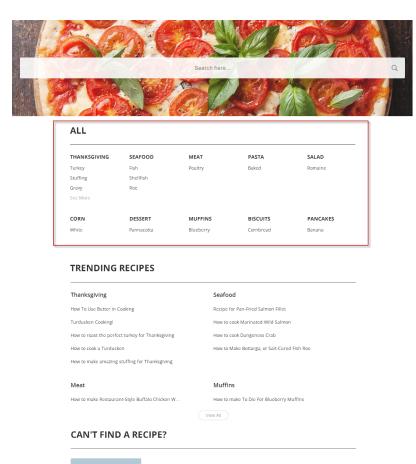
- 1. Select the **Expanded Category Navigation** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Title	If you'd like to display another name for the top-level data category, enter the text in this field. For example, if the top-level category name is <code>Desserts</code> , you can change the text to <code>Easy Dessert Recipes</code> . The text you enter in this field appears only as the title of the page. You aren't changing the name of the category in navigation breadcrumbs or anywhere else
Max Number of Sub-Categories	Specify the to limit the number of child categories to display for each parent category. The default is 3.

Property	Details
Max Number of	Specify the maximum number of parent categories to display in the page. The default is 10,
Categories	but there is no restriction on the number of parent categories you can display.

0

**Example**: Sample Expanded Category Navigation component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Featured Data Categories**

The Featured Data Categories component displays a group of data categories, with an image and title showing for each data category within the specified group.

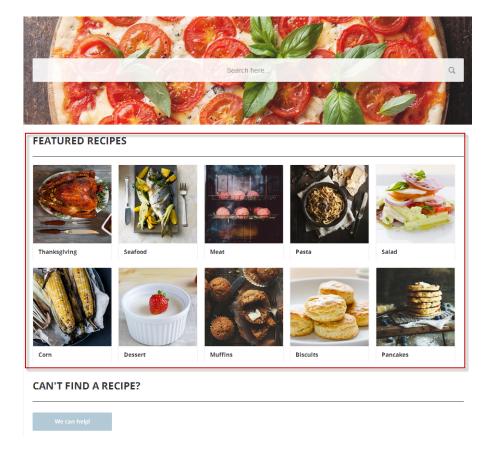
Images help your users select which group of articles they'd like to browse. You can set properties to choose the number of categories displayed on the page.

1. Select the **Featured Data Categories** component in the page you're configuring.

**2.** In the Property Editor, configure properties for the component:

Property	Details
Number of Data Categories	Type the number of data categories to display from the group. Categories display in the order listed in the data categories group.
Category Image URL	Specify the URL to display the image associated with each data category. To automatically display the image for your data categories, type { !Global.PathPrefix}/{!DataCategory.Name}.jpg in the text box. The recommended size for this image is 220 x 220 pixels.
Title	Enter the title text for the list of featured data categories.

**Example:** Sample Featured Data Categories component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Featured Search**

The Featured Search component lets your users search for articles within a specified data category.

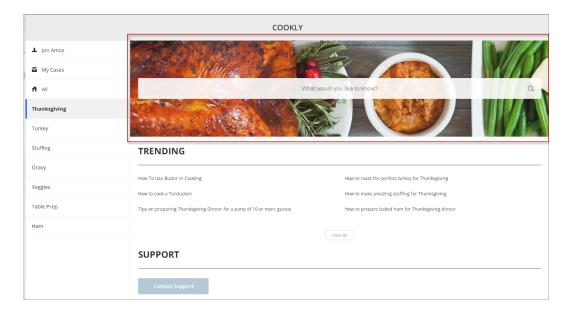
When a user types in the search text box, the system returns articles and search strings based on matches with the characters being typed. You can customize the search to display an image for the data category in which the user is searching.

- 1. Select the **Featured Search** component in the page you're configuring.
- **2.** In the Property Editor, configure properties for the component:

Property	Details
Placeholder Text	Enter the text that appears in the search bar. The default text is What would you like to know?
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Disable Background Image	Select the checkbox if you don't want to display the background image for the category. The search box becomes smaller and more compact.
Max Number of Auto Query Suggestions	Enter the number of search queries to return per match.
Max Number of Article Title Match Results	Enter the maximum number of articles to return per match.
Category Image URL	Specify the URL to display the image associated with each data category. To display the image for your data categories, type { !Global.PathPrefix} / { !DataCategory.Name}.jpg in the text box. The recommended size for this image is 1220 x 175 pixels.

**(1)** 

**Example**: Sample Featured Search component:



#### SEE ALSO:

Which Components Can I Use with Each Template?

### How Incremental Search Works with Koa and Kokua Templates

The search text box returns articles and search strings based on matches with the characters as they are being typed.

Incremental searching gives users immediate results and helps them find the most relevant articles or popular search terms as they type their search string. The user can use the Tab or Arrow keys to display the first suggestion or select on any of the returned results to view that article.



The system queries for public knowledge articles that exist within the channel by which you've made the articles available. So if the user has access to the public knowledge base, only those articles appear in the search. Articles appear in the language that you've selected for the community.

When a user is logged in and clicks the search icon without entering any text, articles and search terms from past searches appear as suggested results.

### **Feed**

The Feed component displays a feed of all record or group interactions, including posts, questions, and attachments.

Use the Feed component in the Napili template to add a feed to a record, a topic, a group, a user profile, or an overall community 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.



Note: The Feed component isn't supported for articles.

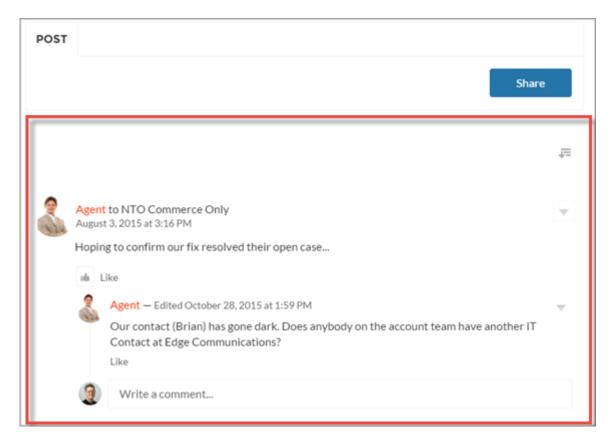
Comments and attachments on posts appear inline below the post for desktop and tablet users.

- 1. Select the **Feed** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Feed Type	Select the type of feed you'd like to place on your page.
Record ID	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Community Discussion or My Feed options in Feed Type.
Default Feed Filter	For feed entries you want your community members to see, select the default filter.
Post Style	Choose whether to expand or collapse post comments by default.



**Example:** Sample Feed component



SEE ALSO:

Which Components Can I Use with Each Template?

# **Feed Compact**

Use the Feed Compact component in the Napili template to add a compact, scannable version of a feed to a record, a topic, a group, a user profile, or an overall community discussion. The component provides a chronological list of question posts made with the Feed Publisher component.



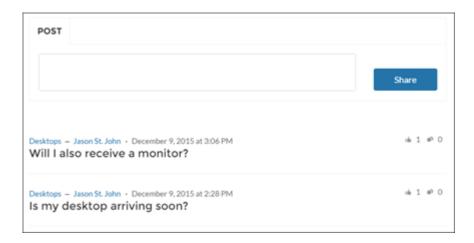
Note: The Feed Compact component displays only question posts, it doesn't support feed filters, nor is it supported for articles.

Clicking a post directs users 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 properties for the component:

Property	Details
Show Likes	Select to show the number of likes for each post. Clear to hide the number of likes.
Show Comments	${\sf Select}\ to\ show\ the\ number\ of\ comments\ for\ each\ post.\ Clear\ to\ hide\ the\ number\ of\ comments.$
Compact Feed Type	Select the object or context you want to associate this feed with.
Entity Id	The feed item ID. Typically, this field is automatically populated when the page loads. Leave this field blank if you pick the Community Discussion or My Feed options in Compact Feed Type.

### **Example: Sample Feed Compact component**



SEE ALSO:

Which Components Can I Use with Each Template?

### Feed Post & Comments

The Feed Post & Comments component shows the detailed view of an individual post, comment, or question in the community feed. For questions, it includes the question, all the answers to that question, and an indication if it was escalated to a case.



Note: Before Spring '16, this component was named Feed Item Detail.

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 community or **Upload a File** from the user's local drive.

**1.** Select the **Feed Post & Comments** component in the page you're configuring. There are no properties to set for this component.

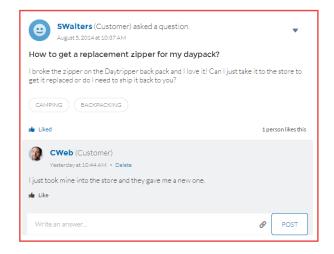


**Example:** Sample Feed Post & Comments component:



# → HOW TO GET A REPLACEMENT ZIPPER FOR MY DAYPACK?

Explore other articles and discussions on this topic.



# TRENDING ARTICLES Backpacking: Before You Leave... Return Policy for Camping Equ... Backpacking for Beginners How to setup camping by water How to Choose Snowboard Bo...

SEE ALSO:

Which Components Can I Use with Each Template?

### Feed Publisher

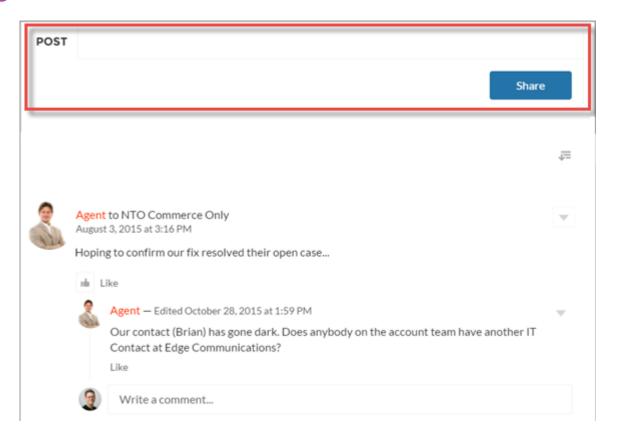
The Feed Publisher component lets customers create rich text posts on records, groups, topics, and profiles, and attach files from any of their devices. It also supports multiple file attachments and rich link previews. The Feed Publisher component isn't supported for articles.

When community members create posts using the Feed Publisher, the posts are displayed in the related Feed or Feed Compact component for the page. By default, you can attach any supported file type up to 2 GB per file.

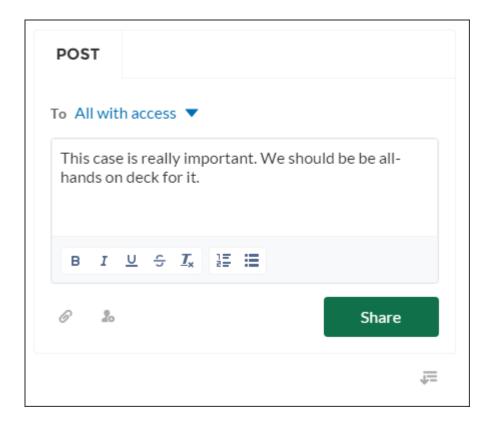
- 1. Select the **Feed Publisher** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Туре	Select the type of feed publisher you'd like 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 and use the publisher actions 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'd like to see the wide or narrow feed publisher layout design.

Example: Sample Feed Publisher component, wide layout



**Example:** Sample Feed Publisher component, narrow layout



Which Components Can I Use with Each Template?

### **Follow Button**

The Follow Button component allows users to follow users or topics.

In the Page Editor, you can configure the follow button component on the Profile and the Topic View pages. This component allows a user to follow a topic or another user by clicking this button. When a user views their own profile, the button isn't visible.

- 1. Select the **Follow Button** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Followed Record ID	The system supplies this value. Don't update this field.



**Example:** Sample Follow Button component:

FOLLOW

SEE ALSO:

Which Components Can I Use with Each Template?

### 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 community navigation menu, clicking the Groups item directs community members to a list of groups. Clicking a group in the group list loads the Group Detail page, which uses this component by default.



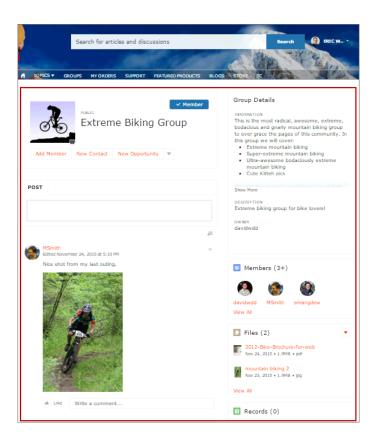
### Note:

- 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 located on the Group Detail page.
  - Note: You must have at least one group in your community to view the Group Detail page and modify its components.
- 2. In the Property Editor, configure properties for the component:

Details
The ID of the group. This value is automatically populated when the group is displayed.
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.
The label used for the group details tab on mobile devices. The default text is <code>Details</code> . The label you specify here doesn't affect labels on desktop browsers.
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:** 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 Template?

### **Group Banner**

Use the Group Banner component on custom group detail pages for your community. 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 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 Template?

# **Group Detail**

Use the Group Detail component on custom group detail pages for your community. This component displays the content from the group description and information fields along with the name of the group owner.

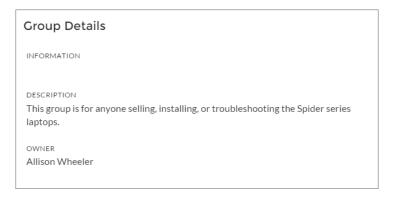
Use the Group Detail component with the Group Banner, Group Related List, Feed Publisher, and the Feed or Feed Compact components to create a custom group detail page. Creating a custom group detail page does not guarantee optimal display and responsiveness across all desktop and mobile devices. We recommend 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 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** 



Which Components Can I Use with Each Template?

### **Group Related List**

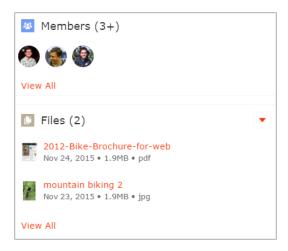
Use the Group Related List component on custom group detail pages for your community. This component displays the group files, members, and records.

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 properties for the component:

Property	Details
Group ID	The ID of the group. This value is automatically populated when the group is displayed.

### **Sample:** Sample Group Related List component



Which Components Can I Use with Each 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.

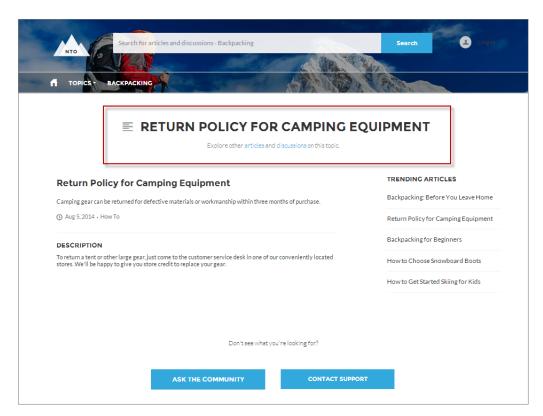
- 1. Select the **Headline** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Title	Enter the static text for the page's headline. The default text for the page is <code>Welcome!</code> .
Banner Text	Enter the static text that appears on the home page. The default text is ${\tt A}$ 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 <code>article</code> , <code>topic</code> , or <code>discussion</code> to retrieve the title of the page and display an icon identifying the type of page the user is viewing.
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.
	<pre>Explore other <a class="headlineArticles" href="javascript:void(0)">articles</a> and <a class="headlineDiscussions" href="javascript:void(0)">discussions</a> on this topic</pre>
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.
	<pre>Explore other <a class="headlineDiscussions" href="javascript:void(0)">discussions</a> on this topic</pre>
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 Template?

# Home Page Tabs

The Home Page Tabs page component lets users change focus and display articles, discussions, or their feed items. Users must be logged in to see the My Feed tab.

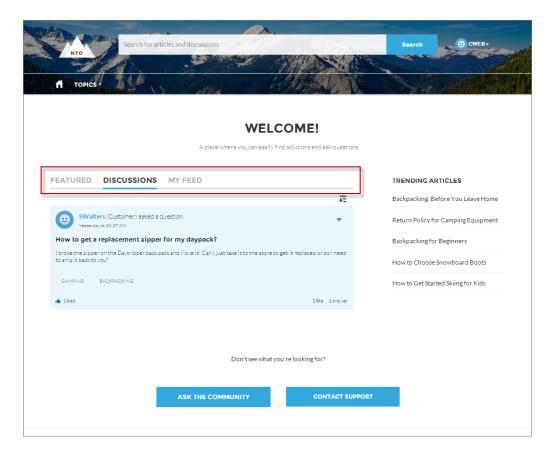


Note: Before Spring '16, this component was named Home Tabs.

- 1. Select the **Home Page Tabs** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Featured Tab Label	Enter the text you'd like to display on the tab that users select to show articles. The default text is Featured.
Discussions Label	Enter the text you'd like to display on the tab that users select to show discussions. The default text is Discussions.
My Feed Label	Enter the text you'd like to display on the tab that users select to show their feed. The default text is My Feed.
Compact Feed in Discussion Tab	Select to use the compact version of the feed in the Discussions tab. Compact feeds show only question titles and make it easer for user to scan the feed. Compact feeds don't support filters.

**Example:** Sample Home Page Tabs component:



### SEE ALSO:

Which Components Can I Use with Each Template?

# Knowledgeable People

Highlight topic experts so the community 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 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.





For communities created in Spring '15 or earlier, complete these steps to add the Knowledgeable People component:

- 1. From the community, click in the global header.
- 2. Click Administration > Preferences, and select Enable knowledgeable people on topics.
- **3.** Click **Administration** > **Pages**, and go to Site.com Studio.
- **4.** In the Site Pages section, double-click the **main** page.
- 5. In the Views tab at left, double-click Napili Topic View.
- **6.** Click the Page Elements tab , and search for the Knowledgeable People component.
- 7. Right-click the component, and place it in the div.cSecondaryContent section.

SEE ALSO:

Which Components Can I Use with Each Template?

### Language Picker

The Language Picker component lets guest users select their preferred language on a page in your community.

You can add the language picker to the header or footer, or to any section of any page; it's not included on any pages by default. Only guest users see the language picker. For authenticated users, the community automatically displays in their profile language.

When a guest user visits the community, Salesforce detects their browser language. If the browser language is one of our 18 fully supported languages, the community automatically displays in that language. If the browser language is not a Salesforce fully supported language, the community displays in the default site language. Customized labels and Knowledge articles use the translations added by the community admin in Translation Workbench.

If the quest user wants to view the community in a different language, they can select their preferred language using the language picker. The language picker shows all languages supported in the community. When the user selects a language, the page reloads in that language.

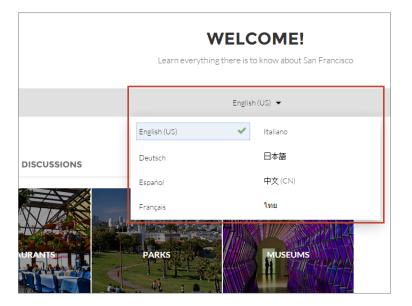


### Note:

- The Language pane in Site.com Studio shows the default language as well as the list of languages supported in the community. If no languages apart from the default language have been set in Site.com Studio, the language picker shows the default language without a drop-down option. To learn more about setting site languages in Site.com Studio, see Creating a Multilingual Site.
- To see the list of languages that guest users will see, go to the Branding Editor in Community Builder and make sure you're on a page that contains the language picker. Then click the drop-down icon on the language picker.
- 1. Select the Language Picker component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Alignment (Left,	Enter Left, Center, or Right to indicate how the language picker should be aligned
Center, or Right)	on the page. The default value is Center.

**Example**: Sample Language Picker component with drop-down language list visible:



### SEE ALSO:

Which Components Can I Use with Each Template?

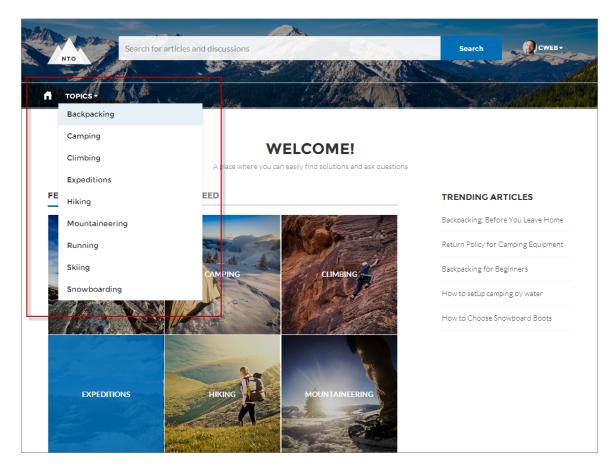
# **Navigation Bar**

The Navigation Bar component lets users select different topics to browse and provides navigation back to the community home page. If your Napili template version is Winter '16 or later, this component is replaced with the Navigation Menu component.

- 1. Select the **Navigation Bar** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Topic Menu Label	Enter the text you want to appear as the label for the drop-down list of topics that appears in the navigation bar.

**Example:** Sample Navigation Bar component:



### SEE ALSO:

Which Components Can I Use with Each Template?

# Navigation Menu

The navigation menu component allows you to extend your community's navigation beyond navigational topics. Navigation menu items can include Salesforce objects, topics, pages in your community, and URLs to external sites.

When setting up the navigation menu, consider the following:

- Menu item labels must be unique within the community.
- You can add up to 20 navigation menu items. Navigation menu items that don't fit on the first line of the navigation menu wrap to the next line.
- If you want to map a navigational topic to a menu item, you must first set it up in Community Management.

To create or modify navigation menu items:

- 1. Select the **Navigation Menu** component in the page you're configuring.
- 2. In the Property Editor, click **Edit Navigation Menu**. In the menu editor overlay, you can edit or delete existing menu items, or add new ones.
- **3.** 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:

- Salesforce Object—Available objects include accounts, cases, contacts, leads, opportunities, 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 community with minimum configuration.
- External URL—Links to a URL outside of your community. For example, http://www.salesforce.com.
- Community Page—Links to a page inside your community using a relative URL. For example, /contactsupport.
- Navigational Topic—A drop-down with links to the navigational topics in your community. Navigational topics are set up in Community Management.
- **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 Community Page, use the drop-down to select the community page you want to link to. The URL field automatically populates the relative URL for the page based on your selection.
  - If you selected External URL, enter the fully qualified URL.
  - Select **Publicly Available** if you want the navigation menu item to show for guest users that aren't members of the community.
- **4.** To move an item, click  $\clubsuit$  and drag the item to where you want it to appear in the menu.
- 5. To delete a menu item, hover over or click the item and click ×.
- 6. Save your changes.

If your community is already active, you see a Publish Changes button. **When you click this button, your new navigation menu changes are immediately visible to community members.** 

If your community is still in Preview status, you see a Save Changes button. When you click this button, your changes are saved and will be visible to your community when you activate it.

**Example**: Sample Navigation Menu component:



On a mobile device, your community navigation menu collapses to better fit your screen.

Sample Navigation Menu component on a mobile device:



If your community hosts users who speak different languages, you can translate your navigation menu using the Translation Workbench. For information on using the Translation Workbench, see "Entering Translated Terms" in the Salesforce help.

SEE ALSO:

Which Components Can I Use with Each Template?

# Profile Header

The Profile Header component displays a user's name (or nickname) and profile picture with a drop-down that lets users navigate to their profile, open a case, access their locale and email notification settings, or log out of the community. External users can also access and manage their account. If the user isn't logged in, a Login button appears in the header.

Users can't customize the profile photo functionality in the profile header—they need to edit all profile information from the profile details page.



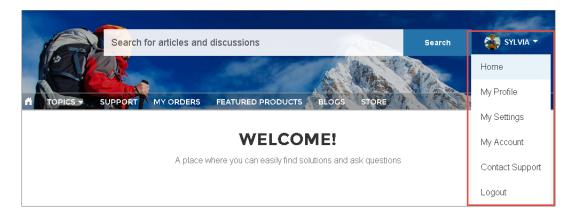
Note: If nickname display is enabled in the community, this component shows the nickname instead of the user's name. The user's reputation level displays only if reputation is enabled in the community.

- 1. Select the **Profile Header** component in the page you're configuring.
- 2. In the Property Editor, configure 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 community to display the user's list of cases.
	Note: 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 community home page from the user navigation menu. The default text is <i>Home</i> .
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 <i>Contact Support</i> .
Login Label	Enter the text you want to show for the link to log in to the community. The default text is Login.
Logout Label	Enter the text you want to show for the link to log out from the community. The default text is Log Out.
Community Management	Enter the text you want to show for the link to the Community Management page. The default text is . This link only appears for users with permissions to manage the community.
Community Setup Label	Enter the text you want to show for the link to the setup page for communities. The default text is <i>Community Setup</i> . This link is shown to users with permissions to create or modify the community's administration settings.
User Settings (Napili template only)	Enter the text you want to show for the link to access an authenticated user's personal settings for the community. The default text is My Settings.
Show User Settings in Menu (Napili template only)	Select this checkbox to show user setting in the profile drop-down list.
My Account Label (Napili 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 Napili template and later.
	Note: External community 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 Template?

### Recommendations

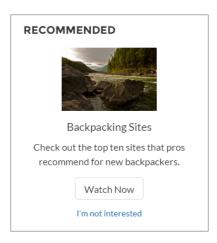
The Recommendations component displays the recommendations for your community.

You can configure the Recommendations component in the Page Editor. The component appears on the community page when a custom recommendation or a system-generated topic recommendation is available.

- 1. Select the **Recommendations** component.
- 2. In the Property Editor, configure 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 <code>Default Channel</code> . 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.





Which Components Can I Use with Each Template?

### **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. Napili supports a record detail page that you can use out of the box with no configuration. All objects in your community 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 (that uses a preassigned case detail layout) and 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.

- The Record Banner component supports accounts, cases, contacts, tasks, events, and custom objects.
- You can use the Record Banner component on custom record detail pages that you create. We recommend using it with the Record Information component.
- You can modify what fields display in the Record Banner component by customizing the Highlights Panel layout in the object's page layout.
- Community members with the necessary permissions can use the Edit and Delete buttons to modify or delete the record. These buttons don't display on mobile devices.
- Note: For optimal appearance, choose a wide column width when placing this component on your community page.
- 1. From the Page menu in Community Builder, select Record Detail or your custom record detail page.
- 2. Select the **Record Banner** component or drag the component from the Page Editor to the page to add it.
- **3.** In the Property Editor, configure properties for the component:

Property	Details
Record ID	The ID of the record displayed. Typically, this field is automatically populated.



**Example:** Sample Record Banner component in Napili:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Record Detail**

Use this component to share record details in your Napili community.

Simply drag the Record Detail component on a record detail or a custom page in a Napili community, and it populates with record information stored in Salesforce. This component is a great way to share information with community members who need it most, like partners.



**Note**: To display the record feed, use one the feed components with the feed publisher component. To show the related records, use the Record Related 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 properties for the component:

Property	Details
Record ID	The record ID. Typically, this field automatically picks up the record ID when the page loads.



Account Owner Scott Clark	Change Account O	Phone (905) 555-1212	
Account Name Global Media		Fax	
Parent Account		Website	
ADDITIONAL INFORMA	TION		
Type Prospect		Employees 14,668	
Industry		Annual Revenue	
Media		FILLEDOTESSES	

### **Record Information Tabs**

The Record Information Tabs component shows detailed record information, lists of related records, and the record feed.

Before Spring '16, this component was called Record Information. The Record Information Tabs component uses the Record Detail Page and the Record Banner component to display record data. Let's dive in and look at it more closely. Napili supports a record detail page that you can use out of the box with no configuration. All objects in your community 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 (that uses a preassigned case detail layout) and 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.

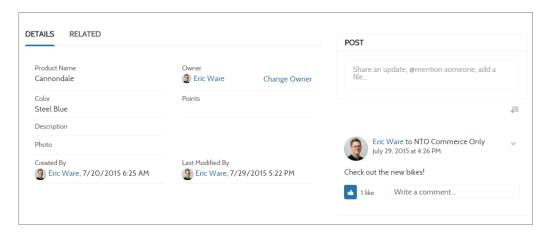
- The Record Information Tabs component supports accounts, cases, contacts, tasks, events, and custom objects.
- You can use the Record Information Tabs component on custom record detail pages that you create. We recommend using it with the Record Banner component.
- You can modify what fields display in the Record Information Tabs component by customizing the object's page layout.
- Community members with permissions can create new related records 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. These buttons don't display on mobile
  devices.
- 1. In the Community Builder Page Editor, select Record Detail or your custom record detail page from the page menu.
- 2. Select the Record Information Tabs component or drag the component from the Page Editor to the page to add it.
- **3.** In the Property Editor, configure 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.

Property	Details
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 in Napili:



SEE ALSO:

Which Components Can I Use with Each 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 doesn't have access to a particular list view, they see the Recently Used list view instead.



Note: Before Spring '16, this component was named Record List View.

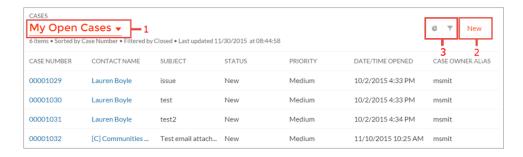
When you create a custom navigation menu item using the Salesforce Object type, it automatically links to a page that displays a list of records for that object. Napili provides an out-of-the-box page to display that list of records. This generic page, called the Record List page, is used for all objects in your community unless you create a custom page.

- The Record List component supports accounts, cases, contacts, groups, leads, opportunities, and custom objects.
- You can use the Record List component on any page in your community. 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.
- The Record List component is available in two layouts—Full and Compact—so you can choose the one that best meets your needs.
   The compact layout is ideal for showing short lists of information in a narrow column or when displaying your community on a mobile device. When a page using the full layout is viewed on a mobile device, the page automatically switches to the compact layout.
- Community members with the necessary permissions can use the New button on the component to create new records. This button doesn't display on mobile devices.

- Community members can click to filter the list view or remove filters. They can also click to view related charts. These buttons don't display on mobile devices.
- 1. Select the **Record List** component on the Record List page.
- 2. In the Property Editor, configure 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 is the number of records shown. If there are more than 25 records, you 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 is the number of records initially shown. As a user scrolls down, additional records are displayed. The maximum number of records per page for the full layout is 100.
Layout	Choose from full layout or compact layout. When choosing the layout, consider the following:
	• Compact layout works in any size column. For full layout, use a column width of at least 50% of the page.
	<ul> <li>If using the full layout, we recommend that you don't place a component below the Record List component on the page.</li> </ul>
	<ul> <li>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 component may overlap the component below.</li> </ul>
	<ul> <li>Full layout uses infinite scrolling. If you reference an object that contains many records, infinite scrolling may prevent you from ever seeing the component below the Record List component.</li> </ul>
Page's Object Name	The Salesforce object whose records you want to show. The drop-down shows the supported objects: accounts, cases, contacts, groups, leads, opportunities, and custom objects.
Page's Filter Name	The list view to show for the selected object. The drop-down shows only list views that are valid for the object you select.

**Example:** Sample Record List component (Full layout):



• Use the menu (1) to change the list view.

- Use the New button (2) to create a record. A window pops up where a user can enter and save record details.
- Use the buttons (3) to filter the list view or view related charts. Because external community users can't be assigned the "Create and Customize List Views" permission, they can't filter list views.

Sample Record List component (Compact layout):



SEE ALSO:

Which Components Can I Use with Each Template?

### **Record Related List**

The Record Related List component shows a list of records that are 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 Record Related List component on a record detail page or on a custom page to show a list of related records.

When a user expands the list of related records, the Related Record List page is displayed, which uses the Record Related List component under the hood.

- 1. Select the **Record Related List** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Parent Record ID	The ID of the parent record.
Related List Name	Name of the related list.

**(1)** 

**Example:** Sample Record Related List component:



Which Components Can I Use with Each Template?

# **Related Topics List**

The Related Topics List component displays the topics related to the topic being viewed by the user.



Note: Before Spring '16, this component was named Related Topics.

In the Page Editor, you can configure the Related Topics List component on the Topics View page.

- 1. Select the **Related Topics List** component.
- 2. In the Property Editor, configure 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	The system supplies this value. Don't update this field.



**Example:** Sample Related Topics List component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Reputation Leaderboard**

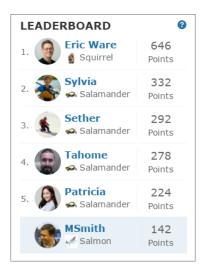
The Reputation Leaderboard component displays a list of community members with the highest reputation points. In the Page Editor, you can configure the Reputation Leaderboard component on the Home page.

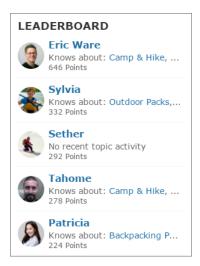
- 1. Select the **Reputation Leaderboard** component.
- **2.** In the Property Editor, configure properties for the component:

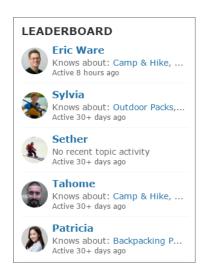
Property	Details
Title	Enter a title for the reputation leaderboard. The default text is Leaderboard.
Number of Users	Enter the maximum number of users to display. You can display up to 10. The default is 5.
Show User Rank	Displays the ranks of the users shown in the leaderboard.
Show Logged-In User	• If the logged-in user 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.
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 community!
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.
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 would say "Knows about: Backpacks."

**Example:** Sample Reputation Leaderboard component:

Level and Points Topics and Points Topics and Last Active





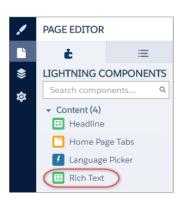


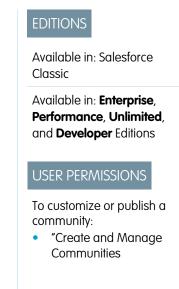
Which Components Can I Use with Each Template?

### Rich Text

The Rich Text component lets you add formatted custom text to your community pages, along with images and embedded videos.

1. In the Page Editor, drag the Rich Text component from the Lightning Components tab onto the page canvas.

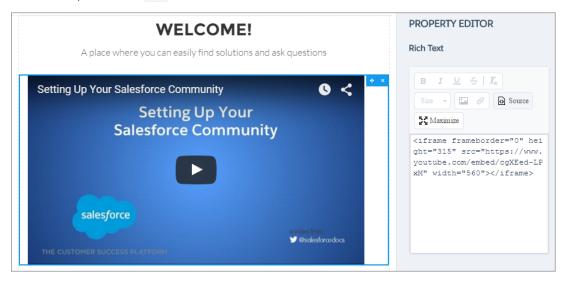




2. Use the Property Editor to add and format text. You can also add images (1), insert source code (2) to embed a video, and expand the dialog box (3) to access more options.



- Note: Images and videos are supported only in Rich Text components that were added after the Spring '16 release.
- **Example**: To embed a video such as a YouTube video, click **Source** and add the embed code. Alternatively, when the dialog box is maximized, you can click to add the iframe information.



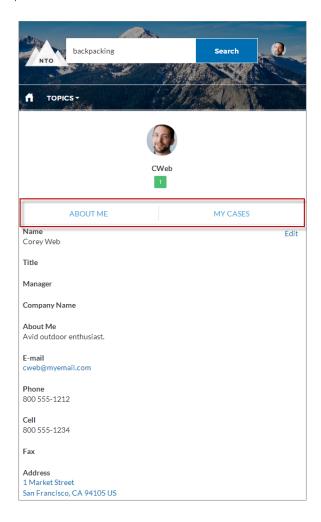
# Scroll To

Custom code on the Napili Profile page lets users scroll to the selected component from a user's profile page. This saves a mobile user from having to scroll to a profile component that isn't visible on his or her device.

- 1. On the Napili 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.

**(1)** 

**Example:** Sample Scroll To component:



SEE ALSO:

Which Components Can I Use with Each Template?

### Search

The Search component lets users search articles within the context of the page they're viewing.

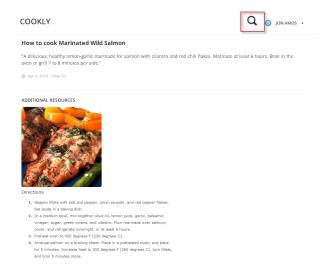
When a user types in the search text box, the system returns suggested articles and search strings that match the characters typed in the search box.

- 1. Select the **Search** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Placeholder Text	Enter the text that appears in the search bar. The default value is What would you like to know?

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Max Number of Auto Query Suggestions	Select the number of search queries to return per match.
Max Number of Article Title Match Results	Select the number of articles to return per match.





Which Components Can I Use with Each Template?

### Search Publisher

The Search Publisher component lets your users search for articles and discussions. It also lets users ask questions or contact support when they can't find the information they're looking for.

When a user enters a question in Chatter, similar questions and Knowledge articles automatically appear in a drop-down list below the Chatter publisher. Questions in the search results show the number of answers and a green checkmark with the text Best Answer if a best answer was selected.

The drop-down search results are based on whether the question or article title contains the text entered by the user. The search accounts for partially matching terms and non-adjacent terms; for example, the results for "best backpack" could include a question titled "Which backpack is best for day hikes?", and the results for "backpack" could include an article titled "Backpacking Tips". When a user performs a full search by clicking **Search**, the search engine also scans question descriptions and article text for matching terms.

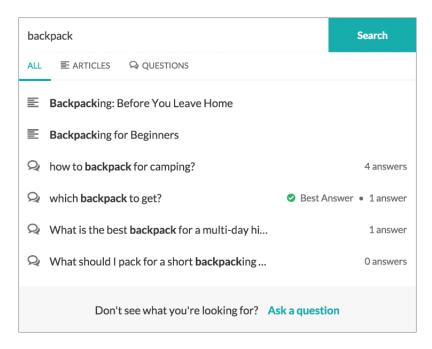
1. Select the **Search Publisher** component in the page you're configuring.

### **2.** In the Property Editor, configure properties for the component:

Property	Details	
Enable Contact Support	Select this option to let users contact customer support to create a case.	
Contact Support Label	Enter the text to display for the option to create a case.	
Contact Support Privately Label	Enter the text to display for the option to contact support in a private message.	
Case Quick Action Name	Enter the name of the action that creates new cases. Use the action layout editor to specify which fields to include in the layout. You also need to include this action in the Web-to-Case settings. For more information on quick actions and Web-to-Case, see the Salesforce Help.	
Search Box Placeholder Text	Specify the text that appears in the search box. The default text is Search for articles and discussions.	
All Results Label	Enter the name of the search results tab that displays both questions and articles. The default text is All. This functionality is available only in the Winter '16 and later versions of community templates.	
Article Results Label	Enter the name of the search results tab that displays articles only. The default text is Articles. This functionality is available only in the Winter '16 and later versions of community templates.	
Question Results Label	Enter the name of the search results tab that displays questions only. The default text is Questions. This functionality is available only in the Winter '16 and later versions of community templates.	
Max Number of Results Returned	Enter the maximum number of results displayed on each tab during a search. The default value is 6. An equal number of questions and articles is displayed in the combined results tab, but if there aren't enough of one type of result, additional results of the other type are displayed to reach the maximum. This functionality is available only in the Winter '16 and later versions of community templates.	
Show Questions Before Articles	By default, articles appear above questions in the combined search results, and the article results tab precedes the question results tab. Select this option (which is off by default) to display questions before articles, and to switch the tab order. This functionality is available only in the Winter '16 and later versions of community templates.	
Post To Label	Enter the text that directs the user to create a post.	
Select Topic Label	Enter the text that lets users pick a topic for their question or contact customer support. The default text is Select Post Destination.	
Topic Required Label	Enter the text that shows that selecting a topic is required.	
Continue to Post Text	Enter the text that invites users to post a question to the community or to customer support. The default text is Don't see what you're looking for?.	
Post a Question Text	Enter the text that users click to ask a question. The default text is Ask a new question.	
Sign In to Post Question Text	Enter the text that directs users to a login page before they ask a question.	

Property	Details
Allow File Attachments	Select this option to let users attach a file to a question.

**Example:** Sample Search Publisher component:



SEE ALSO:

Which Components Can I Use with Each Template?

# Search Results

The Search Results component lets users view tabbed lists of articles and discussions that are returned from selecting a topic or typing a string in the Search Publisher.



Note: Before Spring '16, this component was named Results List.

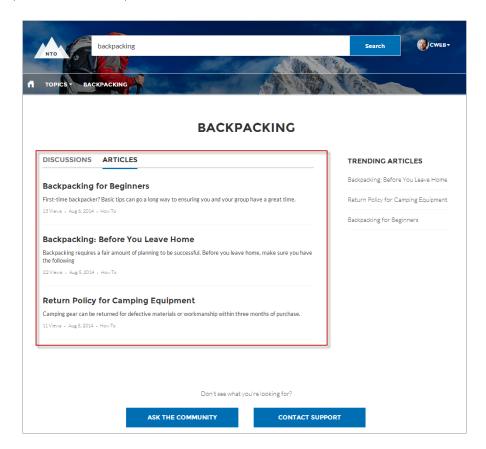
When users filter by topic from the home page, they see articles from all featured and navigational topics in the community. Articles with user-assigned topics don't appear in the result list.

- 1. Select the **Search Results** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Show Article Tab	Select this checkbox if you have Salesforce Knowledge enabled and want community members to search for and view articles.
Number of Articles	Specify the maximum number of articles to display in the component.

Property	Details
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 <code>articles</code> to display the article search results first or <code>discussions</code> to display the contents of the discussion search results first.
Search Term	The expression returns results based on the text users enter when typing their search queries.
Topic ID	The expression in the Topic ID field uses the topic ID that the user selects when filtering by topic.
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.
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.

**Example:** Sample Search Results component:



### SEE ALSO:

Which Components Can I Use with Each Template?

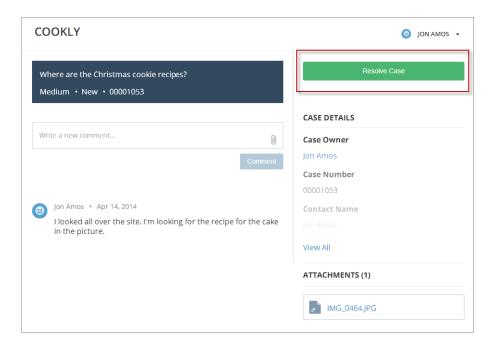
### Set Case Status Button

The Set Case Status Button component lets users click a button to mark a case as resolved and close it.

- Note: Before Spring '16, this component was named Case Status Button.
- 1. Select the **Set Case Status Button** component in the page you're configuring.
- **2.** To configure properties for the component, select the Property Editor:

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.
Active Status Label	Enter the text that appears on the button when the case is still open. For example, the button can be labeled <b>Close Case</b> or <b>Resolve Case</b> .
Inactive Status Label	Enter the text that appears on the button when the case is closed. For example, the button can be labeled <b>Re-Open Case</b> .

**Example:** Sample Set Case Status Button component:



### SEE ALSO:

Which Components Can I Use with Each Template?

# **Toggle Button**

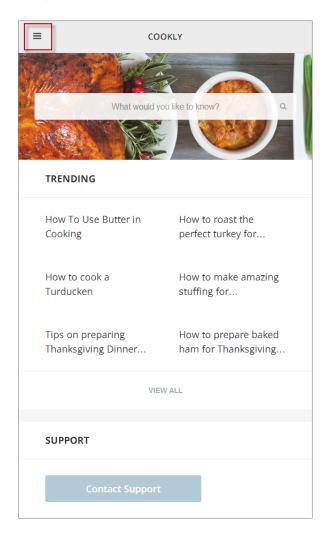
The Toggle Button component lets users display or collapse the left navigation menu for mobile devices and tablets. It doesn't appear in the desktop view.

You can find the **Toggle Button** component in the template header.

Select the **Toggle Button** component in the page you're configuring.
 There are no properties to set for this component.



**Example**: Sample Toggle Button component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Topic Catalog**

The Topic Catalog component lets community members see a full listing of navigational parent and subtopics you have set up for the community in one convenient location.

The following is the maximum number of navigational topics and subtopics you can have in a Napili community 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 community (typically, on the home page).
- 2. Select Add the "More Topics..." link.
- **Example**: When community members can click More Topics link from the Topics list in the navigation menu, they see the topic catalog.



### **TOPICS**

BACKPACKING		
Climbing Backpack	Excursion Backpack	Computer Cases
Hiking Backpack	Events Discussion	Rolling Backpack Cases
School	Waterfest	
Computer	VAGKRAFT	

SEE ALSO:

Which Components Can I Use with Each Template?

# **Trending Articles**

The Trending Articles component displays the most popular articles in your community. You can display them sorted by category or just display the top articles regardless of category.

An article's popularity is based on the number of recent views. You can specify two different display options for this component:

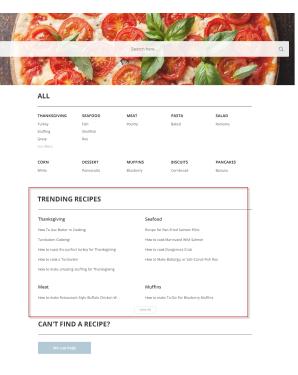
- A two-column list of the top trending articles for the community.
- Two or more columns of trending articles sorted by data category. When a data category doesn't have any articles that are trending, it doesn't appear in the list.

- 1. Select the **Trending Articles** component in the page you're configuring.
- **2.** In the Property Editor, configure properties for the component:

Property	Details
Category Name	The top-level category that contains the subcategories for articles is automatically set using an expression that uses the top-level category you specified in the template's Custom Properties.
Number of Articles	Enter the maximum number of articles to display in the component. If you are using the two-column view with images, this will be the total number of articles that appear in the component. If you choose to display articles by data category, this will be the number of articles per child category.
Number of Categories	Enter the maximum number of categories to display in the component. This value controls whether the trending articles are organized by category or not:
	• To view a list of trending articles that isn't organized by categories, type 0 in the field.
	<ul> <li>To view trending articles organized by data category, specify the number of categories to display.</li> </ul>
	Note: If you specify a parent category that has no children, the component will display the trending articles without categories even if you specify a number in this field.
Title	Enter a title for the component. The default text is <i>Trending</i> .

0

**Example:** Sample Trending Articles component:



SEE ALSO:

Which Components Can I Use with Each Template?

## Trending Articles by Topic

The Trending Articles by Topic component displays the most popular articles in your community organized by topic.



Note: Before Spring '16, this component was named Topic Trending Articles.

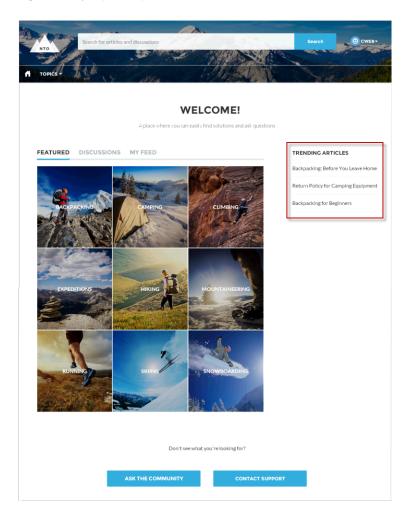
The topicID attribute is optional. If it's not set, then trending articles scoped by all managed topics appear in the component. An article's popularity is based on the number of recent views.

- 1. Select the **Trending Articles by Topic** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Title	$Enter the text that is the title for the component. The default text is \ \textit{Trending Articles}.$
Number of Articles	Enter the maximum number of trending articles to display.
Topic ID	The expression in the field uses 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.

**(1)** 

**Example:** Sample Trending Articles by Topic component:



SEE ALSO:

Which Components Can I Use with Each Template?

# **Trending Topics**

The Trending Topics component displays the popular topics in your community.

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 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.



**Example:** Sample Trending Topics component:



SEE ALSO:

Which Components Can I Use with Each Template?

#### **User Profile**

The User Profile component shows detailed information for a user, including 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 Knowledgeable About. You can also customize labels.

The layout of the component also makes it ideal for viewing your community on a mobile device. When viewed on a mobile device or tablet, the component uses a single column layout that includes four tabs: Feed, Cases, Details, and Related. The Cases tab is only visible when a user views their own profile. You can edit all tab labels.

If nickname display is enabled for the community, 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.

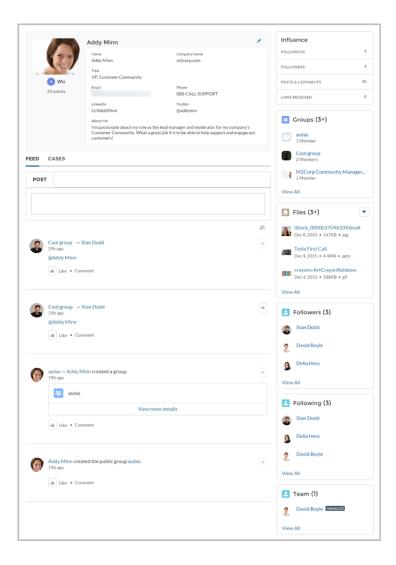
If you prefer to use a different layout or want more granular control over the placement of user profile content, create a custom community page and use the User Profile Summary, User Profile Tabs, User Profile Statistics, User Profile Knowledgeable About, and User Profile Related List components.

- 1. Select the **User Profile** component in the page you're configuring.
- **2.** Select the Properties pane to view properties for the component:

Details
The system supplies this value so that authenticated users can view their own information. Don't update this field.
Shows posts and comments on records in your feed. For example, if a user comments on a record in the community, and you have access to the record, you see the update in your feed. If disabled, the feed shows only activity, such as questions and answers, from within the community. This option is disabled by default.
Determines if the user's Chatter statistics are shown. Statistics include number of posts and comments, likes received, followers, and people they're following.
Enter a title for the Influence list. The default text is Influence.
Determines if the Knowledgeable About list is shown.

Property	Details
Knowledgeable About Label	$\label{thm:continuous} Enter a \ title \ for \ the \ Knowledge able \ About \ list. The \ default \ text \ is \ Knowledge able \ About.$
Maximum Topics in Knowledgeable About Displayed (up to 10)	Enter the maximum number of topics listed for each user in the Knowledgeable About list, up to a limit of 10.
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 <i>Feed</i> .
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 <code>Cases</code> .
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.
Record Details Tab Label (Mobile only)	Determines if a tab appears for the record details. Record details include profile details, Knowledgeable About, and Influence. The tab label is <code>Details</code> . Available only when a community is viewed on a mobile device.
Related Records Tab Label (Mobile only)	Determines if a tab appears for related records, such as Groups, Files, Followers, and Following. The tab label is Related. Available only when a community is viewed on a mobile device.

**Example:** Sample User Profile component



SEE ALSO:

Which Components Can I Use with Each 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.



Note: Before Spring '16, this component was named User Profile Body.

Chatter statistics for the community 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 community can quickly see areas of expertise. Topic knowledge is calculated based on factors such as best answers, mentions, or likes on questions and posts.

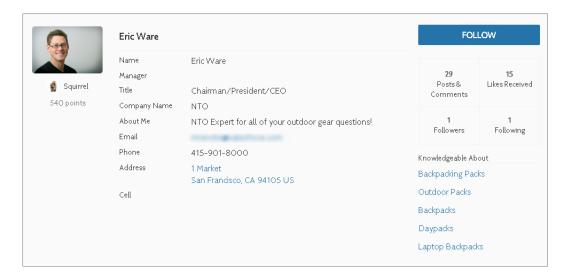
If nickname display is enabled for the community, the nickname is shown in place of the full name when a user views another user's profile. The full name is shown when a user views their own profile.

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 Knowledgeable About	Determines if the Knowledgeable About list is shown.
Title	Enter a title for the component. The default text is Knowledgeable About.
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 community, including to unlicensed guest users accessing the community. To limit access to members' information, use a custom user profile page layout and 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 the Salesforce online help.

### **User Profile Image**

The User Profile Image component displays the user's reputation level, reputation points, and profile photo.



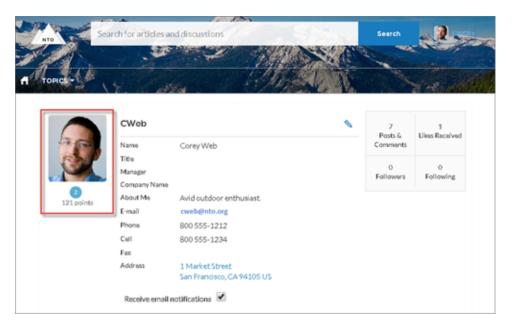
Note: Before Spring '16, this component was named User Profile Header.

You can find the user profile image component in the Profile page. This component allows users to upload their profile photos in the community.

- - Note: The user's reputation level and points display only if reputation is enabled in the community.
- 1. Select the **User Profile Image** component in the page you're configuring.
- 2. In the Property Editor, configure 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.

Example: Sample User Profile Image component:



SEE ALSO:

Which Components Can I Use with Each Template?

## User Profile Knowledgeable About

Allow community members to endorse and recognize experts using the widget directly on a member's profile page.

Once you have enabled Knowledgeable People, community members can endorse one another directly on their community's user profile page. The user profile page also displays all the topics the community member is knowledgeable about, and the number of endorsements received for each topic. Community members aren't able to endorse themselves on any topics.

- 1. Do one of the following:
  - To display the Knowledgeable About list within the User Profile component, select that component.
  - To display the list elsewhere on the profile page, drag the User Profile Knowledgeable About component to the desired location.
- 2. In the Property Editor, configure 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 Knowledgeable About.
Maximum Topics Displayed	Enter the maximum number of topics listed for each user, up to a limit of 10.





SEE ALSO:

Which Components Can I Use with Each 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.

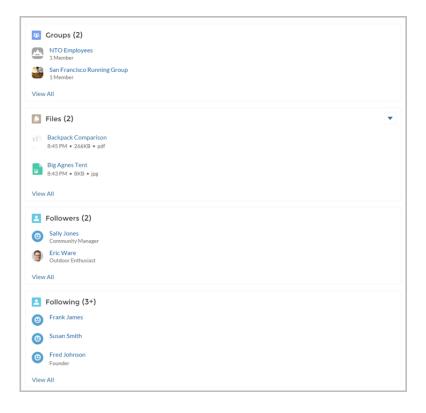
Add the User Profile Related List component to the User Profile page to show a user's related lists. Users can view full details for a related list by clicking **View All** at the bottom of the list. On the Files related list, users can click very to upload a file.

You can customize which related lists are visible in your community by editing the User Profile page layout.

- 1. Select the User Profile Related List component.
- 2. In the Property Editor, configure 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 Template?

### **User Profile Stats**

The User Profile Stats component displays the user's Chatter statistics for the community, including number of posts and comments, likes received, followers, and people they're following.

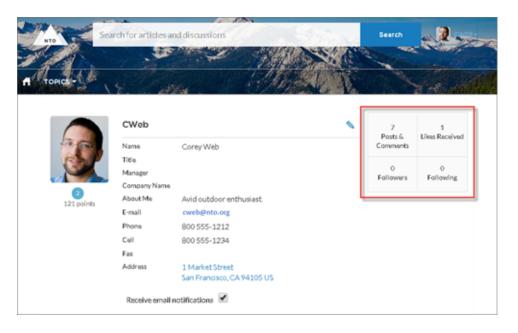
A user's statistics are visible to all members of the community, allowing members to see how active other members of the community are

- 1. Select the **User Profile Stats** component in the page you're configuring.
- **2.** In the Property Editor, configure properties for the component:

User ID The system supplies this value. Don't update this field	

0

**Example**: Sample User Profile Stats component:



SEE ALSO:

Which Components Can I Use with Each Template?

## **User Profile Summary**

The User Profile Summary component displays the user's contact information, title, manager's name, and address. If nickname display is enabled for the community, 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.



By default, all the information in a user's profile is visible to all users in the community, including to unlicensed guest users accessing the community. To limit access to members' information, use a custom user profile page layout and 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 the Salesforce online help.

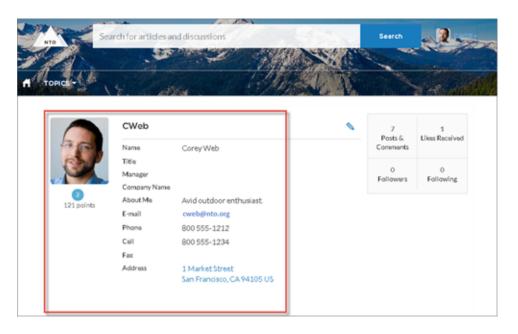
You can add the User Profile Summary component to the Profile page. This component allows users to edit their profile information from the community. When viewing another user's profile, you can click their address to see a Google map of their location.

- Note: When viewing a community 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.

**(3)** 

**Example**: Sample User Profile Summary component:



SEE ALSO:

Which Components Can I Use with Each Template?

### User Profile Summary & Image

The User Profile Summary & Image component displays a user's photo, contact information, reputation level, title, and manager's name. If nickname display is enabled for the community, 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.



Note: Before Spring '16, this component was named User Profile Header Detail.

By default, all the information in a user's profile is visible to all users in the community, including to unlicensed guest users accessing the community. To limit access to members' information, use a custom user profile page layout and hide fields that reveal sensitive information, such as phone, email, title, and manager.

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 the Salesforce online help.

Users in Koa and Kokua communities access the user profile detail by viewing their own profile or clicking another member's name. In their own profile, users can click the pencil icon to edit their contact information. In another user's profile, users can click **Follow** to see the user's community activity directly in their feed. Clicking another user's address displays a Google map of their location.



Note: When viewing a community on a mobile device, the Google map appears below the address.

Important: To avoid issues, make sure that the User Profile Summary & Image component and the Case List component occupy different regions of the My Cases page. They occupy different regions by default, but it is a good practice to verify in your community.

To check, navigate to the My Cases page in Community Builder, go to the Page Editor, and click listed under one region—for example, Content—drag one to a different region.

- 1. Select the **User Profile Summary & Image** 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 & Image component:



## **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.

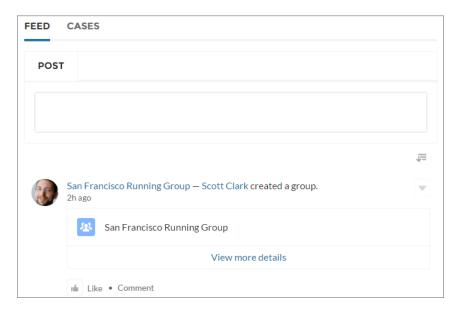
On desktops and tablets, users see a list view of up to 25 of their most recent cases. They can sort columns in the list and click the case number to view the details of that case. Navigation arrows let them click through the list of cases when there are multiple pages. On mobile devices, the view is 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 properties for the component:

Property	Details
User ID	The system supplies this value. Don't update this field.

Property	Details
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 <i>Feed</i> .
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 <code>Cases</code> .
Case Filter Name or ID	Enter the name of the list view that displays cases.
	Note: 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'd like to display on the button that users can click to create a case. The default text is Create Case.
Show Record Activity	Shows posts and comments on records in your feed. For example, if a user comments on a record in the community, and you have access to the record, you see the update in your feed. If disabled, the feed shows only activity, such as questions and answers, from within the community. This option is disabled by default.

**Example:** Sample User Profile Tabs component:



Case list viewed on a mobile device:



SEE ALSO:

Which Components Can I Use with Each Template?

## **User Settings**

The User Settings component displays a user's username, email address, language, locale, time zone, profile visibility, and email notification settings. User settings are only available for authenticated users.

On the User Settings component, users can change their language, locale, and time zone so that the community is localized appropriately. A user can also see their username and change their email or password. Users can choose to show their profile details to guest users who aren't logged in to the community. Users can also choose to receive email based on events in the community. If a user doesn't want to receive email about events in the community, he or she can disable email notifications.

- 1. Select the **User Settings** component in the page you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
User ID	The system supplies this value. Don't update this field.



**Example**: Sample User Settings component:



#### SEE ALSO:

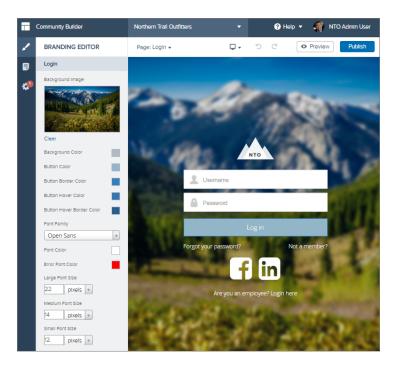
Which Components Can I Use with Each Template?

## **Login Components**

### Brand the Login Pages

Use the Community 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 Community 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 Community 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 set color and text preferences, as needed.
- Example: The Branding Editor settings in Community Builder:



SEE ALSO:

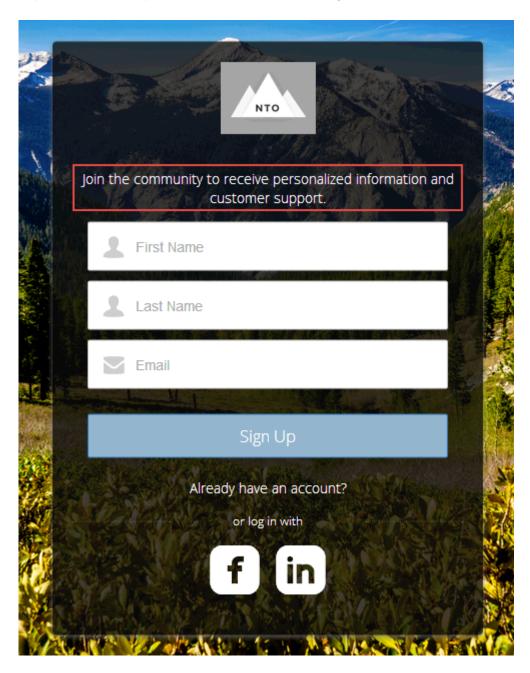
Which Components Can I Use with Each Template?

#### Set Up the Content Block

The Content Block component lets you add text to a page so that you can provide instructions and information to users. For example, you can provide instructions for filling out a form or give a group of components a title.

- 1. In Site.com Studio, select the **Content Heading** or **Content Description** component in the page that you're configuring.
- 2. Click 🚓 .
- 3. Select Edit HTML.
- **4.** Enter the text that you want to display on the page.

**Example:** Sample Content Block component with an introduction to a self-registration form:



#### SEE ALSO:

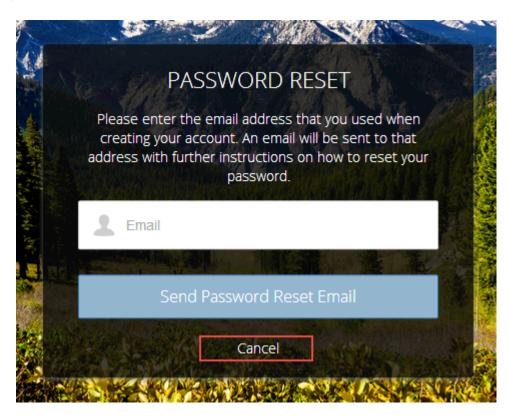
Which Components Can I Use with Each Template?

#### **Custom Code**

Use Custom Code components to send users to a specific page within your community.

The Custom Code component contains JavaScript navigation. Use this component to give users a link to go to another page. If you're familiar with JavaScript, edit the existing code to provide other functionality. The Custom Code component provides simple navigation but can also be your way of adding JavaScript enhancements to your community.

- 1. In Site.com Studio, select the **Custom Code** component in the page you're configuring.
- 2. Click 🙇.
- Select Edit.Edit the JavaScript code to change the navigation or behavior when the user clicks the component.
- 4. Click Save and Close.
- **Example:** Sample Custom Code component as a Cancel button to direct users back to the main login screen if they decide not to reset their password:



SEE ALSO:

Which Components Can I Use with Each Template?

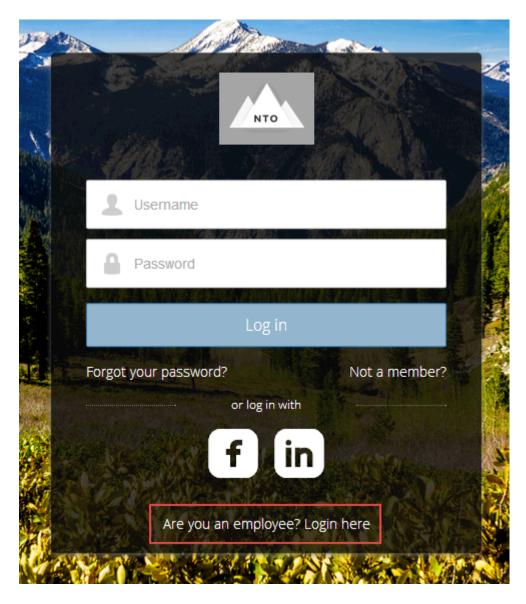
#### **Employee Login Link**

Use the Employee Login Link component to direct users with accounts in the community's parent org to their login page. When your employees or other users who have accounts in the parent org for the community end up on the community 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 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 Template?

## Forgot Password

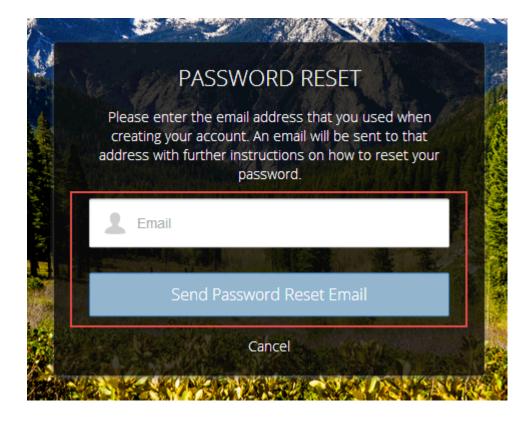
Use the Forgot Password component to let users request a new password.

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 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 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 community.



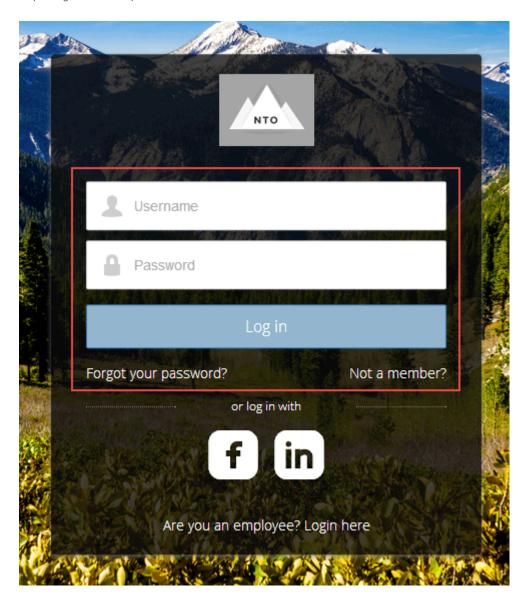
Note: If the community administrator deselects the username and password checkbox on the Administration > Login & **Registration** page in Community Management, the Login Form doesn't appear in the published community. For more information, see "Customizing Communities Login" in Getting Started with Communities.

- 1. Select the **Login Form** component in the page that you're configuring.
- **2.** In the Property Editor, configure properties for the component:

Property	Details
Start URL	Enter the path to the page that users see after they log in successfully. This is the home page for the community.
Username Label	Enter the text for the username field label.
Password Label	Enter the text for the password field label.
Login Button Label	Enter the text for the button that the user clicks to submit the login request.
Forgot Password Link Label	Enter the text for the link to the page where users can request a password reset.
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.
Self Register URL	Enter the page where users can complete a self-registration form.

0

**Example:** Sample Login Form component:



SEE ALSO:

Which Components Can I Use with Each 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.

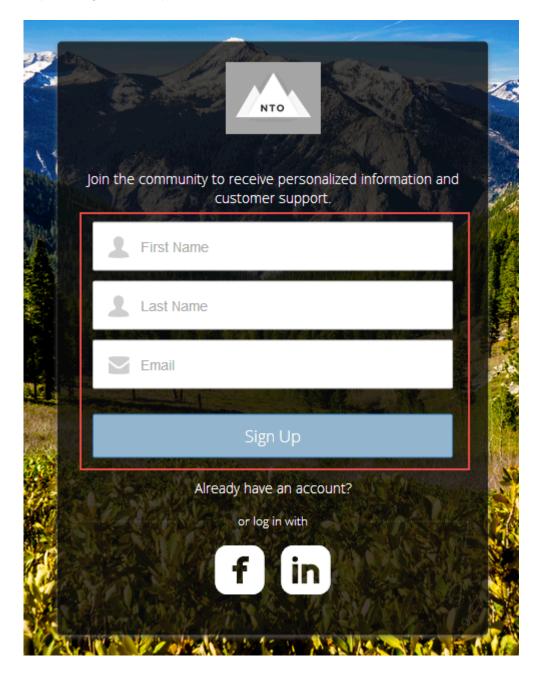
For this component to appear, go to Community Management and select **Administration** > **Login & Registration** > **Allow external users to self-register**.

1. Select the **Self Registration** component in the page that you're configuring.

#### **2.** In the Property Editor, configure 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 community.
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.
Last Name Label	Enter the label text for the user's last name.
Email Label	Enter the label text for the user's email address.
Password Label	Enter the text for the password field label.
Confirm Password Label	Enter the text for the field in which a user confirms the password. This field usually requests that the user 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.
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 Template?

## 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<sup>©</sup> or LinkedIn<sup>©</sup>. Set these icons for each authentication provider that you configure for the org.

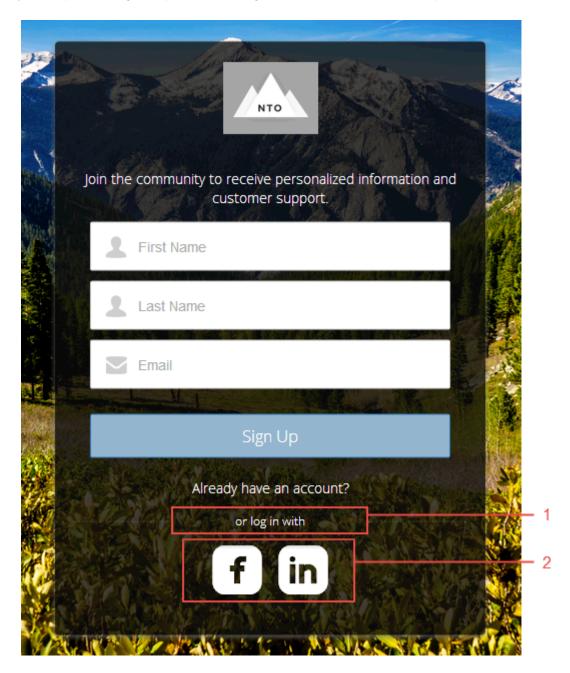
Some users prefer to use an existing account with a service such as Facebook to log in to the community instead of setting up a new account and password. The third-party service is an authentication provider that verifies the identification of the user. Use the Social Login component to add an icon for 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 "Configuring Authentication Providers" in *Getting Started with Communities*.

- 1. Select the **Social Login** component in the page that you're configuring.
- 2. In the Property Editor, configure properties for the component:

Property	Details
Show Header	Select this option to show a text header above the authentication header icons.
Header Text	Enter the text for the header text.

**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 Template?

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