COMMUNITIES ARCHITECTURE RESOURCE GUIDE

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Introduction

Who would leverage the Communities Architecture?

A candidate for this specialization will be able to assess the architecture environment and requirements and designs sound, scalable, and performant solutions on the Force.com platform that meet the requirements for internal and/or external communities. The candidate has experience communicating solutions and design trade-offs to business stakeholders. This specialization is mapped to the Salesforce Certified Community Cloud Consultant Certification.

The candidate has the experience and skills outlined below:

- 5+ years of delivery experience.
- Experience providing guidance on the appropriate choice of platform technology.
- Understands architecture options, design trade-offs, and has the ability to communicate design choices.
- Able to design an appropriate community solution to meet business requirements.
- Experience with sharing and visibility architecture design for community users.
- Able to design an SSO solution for communities.
- Understands user provisioning.
- Understands LDV considerations with communities.
- Understands appropriate choice of community license types.
- Salesforce Security Model: profiles, permission sets, and sharing.

Learn Materials

General Resources

Here are some comprehensive general resources that are a good starting place for your self-paced study.

Set Up and Manage Salesforce Communities

You can use Communities to drive more sales by connecting your employees with your distributors, resellers, and suppliers, deliver world-class service by giving your customers one place to get answers, and manage social listening, content, engagement, and workflow all in one place.

Getting Started with Community Cloud

Everything you need to get up and running with Salesforce.

How to Provision Salesforce Communities Users?

In this article, we'll explain the basic mechanics for provisioning a community user and give an overview of the different techniques available to provision users, either manually or in an automated fashion.

Changing the Guest User Profile

By default, site visitors can access an active public site's information, such as the site's pages and assets. However, to allow guest users to view or submit data to a standard or custom Salesforce object, you must modify the object's permission in the site's guest user profile.

NOTE:

Please register in the Salesforce Success Community and join our Architect Success group here.

General Overview

The following pages will introduce you to various focuses within the Apex and Visualforce domain. You will be introduced to relevant objectives that require a very specific set of skills and the curated learning materials that will help you to achieve them.

- Design
- Identity Management

Each learning resource has a related skill level: **Beginner**, **Intermediate**, or **Advanced**. Resources marked **Core** cover essential concepts, while those marked **Recommended** provide additional materials for further edification.

1. Design and Functionality

This section covers the factors you'll need to consider when designing and implementing Communities solutions to securely connect groups of users to the people and content they need.

1.1 Incorporate all aspects of declarative design to build scenario-based solutions and describe the trade-offs and considerations in the design.

Trailhead : Get Started with Community Cloud

You can use Communities to drive more sales by connecting your employees with your distributors, resellers, and suppliers and manage social listening, content, engagement, and workflow all in one place.
Tags: Beginner, Core

My Domain

Enhance access security and brand your organization's pages by enabling your custom domain.
Tags: Beginner, Core

Chatter Answers Implementation Guide

With Chatter Answers, you can strengthen your brand by increasing your service and support presence online.
Tags: Beginner, Recommended

[Less is More: Visualforce Page Usability and Performance](#)

When you group and present smaller sets of data, you can build smaller pages that load faster, or update only a portion of a page instead of reloading the entire page repeatedly.
Tags: Beginner, Core

1.2 Describe the various license types associated to sites and communities and when to use which license.

[Communities User Licenses](#)

There are three Communities licenses for external users: Customer Community, Customer Community Plus, and Partner Community.
Tags: Beginner, Core

1.3 Demonstrate an understanding of the differences in sharing capabilities for partner, customer, and employee community users and articulate the impact of selecting a community license type on the sharing solution.

[How to Share Files in Chatter Across Communities?](#)

How can you attach the same file (i.e., a link to the same file, the "one version of the truth") to Chatter posts in both the internal community and an external community?
Tags: Beginner, Core

[Grant Super User Access to Customer Users in Your Community](#)

Enable super-user access so that external users in communities can access additional records and data.
Tags: Beginner, Core

[Share Records Owned By High-Volume Community Users](#)

Share Groups allow you to share records owned by high-volume community users with internal and external users in your communities.
Tags: Intermediate, Core

Trailhead : [Manage Your Team's Access to the Salesforce Partner Community](#)

This content will explain how to add a user to the Salesforce Partner Community and define the permissions that determine how your employees can access or modify data.
Tags: Intermediate, Core

[Grant High-Volume Community Users Access to Records](#)

Grant high-volume community users access to records using sharing sets.
Tags: Intermediate, Recommended

1.4 Demonstrate an understanding of the different UI / UX capabilities to style a community.

[Using Templates to Build Communities](#)

Community Templates for Self-Service 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.
Tags: Intermediate, Core

[Communities Containers: Options for Building Salesforce Communities](#)

A container can be thought of as the top-level architectural choice for how to drive pages in a Salesforce Community. Choice of a container determines not only how pages are built, but also how a community is branded, how native page functionality is treated, and the extent of the customizability and mobile strategy of a community.
Tags: Intermediate, Recommended

1.5 Demonstrate an understanding of mobilization considerations for communities.

Access to Communities Using Salesforce1

Community access through the Salesforce1 mobile apps depends on a number of factors, including the type of template used to create the community and the licenses and permissions of community members.
Tags: Intermediate, Recommended

1.6 Describe the use of public and private site.com pages and the impact of a Guest User profile.

Add Authenticated Site.com Pages to Community Tabs

After you create a private Site.com page, you can add the page to a tab in your community.
Tags: Intermediate, Recommended

2. Identity Management

Learn how to use the identity capabilities of the Salesforce1 platform to address common identity and access management challenges.

2.1 Describe how identity management is handled within Communities: provisioning, syncing, and deprovisioning.

How to Provision Salesforce Communities Users?

In this article, we'll explain the basic mechanics for provisioning a community user and give an overview of the different techniques available to provision users, either manually or in an automated fashion.
Tags: Beginner, Core

Social Single Sign-On with OpenID Connect

Get hands-on with the new Salesforce Identity feature OpenID Connect to link your Salesforce or Community Identity with a Social Identity, such as Google+. Once connected, you can enable single sign-on and even share data between services.
Tags: Advanced, Core

Salesforce Communities

Janrain Social Login can be integrated with Salesforce Communities to provide salesforce Community site visitors with the ability to sign in with any Janrain- supported social provider.
Tags: Advanced, Recommended

2.2 Describe an appropriate SSO solution for communities.

[Deploying Single Sign-On and Identity for Employees, Customers, and Partners](#)

In this session, you'll learn how to deploy Salesforce Identity to solve major use-cases like single sign-on and provisioning with hands-on demonstrations of setting this all up from scratch.
Tags: Intermediate, Core

Build Materials

1. Customer Communities

> **1.3** Demonstrates an understanding of the differences in sharing capabilities for partner, customer, and employee community users and is able to articulate the impact of selecting a community license type on the sharing solution.

Use Case

The computing division of Universal Containers is divided into Sales and Service organizations reporting to the CEO. They are currently using Accounts, Contacts, Cases, and Opportunities functionality in Salesforce.

- 15,000 Direct Sales representatives are organized hierarchically by geography.
  □ Executive Vice President (VP) of Global Sales.
  □ Senior VPs of each major region: APAC, EMEA, AMER.
  □ Divisional VPs of each region's countries (e.g., USA, Canada, etc.). There are 127 countries that Universal Containers operates in.
  □ District Managers for each major territory/state in each country. There can be up to 30 territories per country, with an average of 10.
  □ Sales Representatives that report to each District Manager. Sales Reps typically operate at a city or local region level.

- 10,000 Channel Representatives report to the Executive VP of Global Sales and are organized by Partner Tiers:
  □ Premium Partners
  □ Resellers

- There are over 500 service engineers that form part of a Customer Service organization that are organized by two major product functions, with a manager of each major function:
  □ Hardware
  □ Software

- Each function has up to 25 specialty teams (e.g., Hardware – Desktops, Hardware – Laptops, etc.) and users can work in more than one team. A team usually consists of 25 users.
- Sales reps at the city/local region level will own accounts and opportunities. Reporting will roll up through their district manager up to the Executive VP of Sales.
- Channel reps will own partner accounts.
- Opportunities are initially only visible to the Sales Rep that owns the opportunity.
- Users in the Sales organization (Channel and Direct Sales reps) only have access to the accounts they own as well as the accounts that are owned by their subordinates.

- Users should have the same access to contacts as they do to the contact's related account.
- Direct Sales reporting needs to roll up from the DM to the Executive VP of Sales.
- Channel Sales reporting roll up by Partner Tier to the Executive VP of Sales.
- Customer Service engineers reports roll up by product function only (e.g., hardware and software). There is no requirement to roll up reporting from specialty teams to the product function level.

Detailed Requirements

- The computing division of Universal Containers needs to provide their customers the ability to create and view service requests from a portal. They currently have 1,000,000 customers with up to 5 contacts at each customer.
- Customers can view and manage cases related to their accounts, but do not have access to cases owned by other accounts.
- A customer account can have one or more contacts, each of whom has access to all the related cases for that account.

Prerequisite Setup Steps

- Assume that High Volume Portal licenses are being used in a Customer Community.
- Set up Customer Community with content and membership.
  - □ Set up a Community-based domain and make sure the domain name has been propagated. This may take 24 hours.
  - □ Create a Customer Community under that base domain name. For example, if your base Community domain URL is https://mycommunity.force.com/ then your Customer Community could be https://mycommunity.force.com/customer.
  - □ Add tabs like Accounts, Cases, etc.
  - □ Set up the membership for the community by assigning a specific profile--Customer Community profile or one cloned from it.
  - □ Create an account and enable the account for Customer Community.
  - □ Add contacts under that account and enable the contact for Customer Community access; this will add the user with a community user profile. Alternatively, you can set up self-registration for community users and register users from that page instead of enabling contact manually.
  - □ Create a test community user and log in to the community to make sure you can view the Cases tab and are able to raise a case.

Considerations

1. What are the different sharing mechanisms available for customer community users?
2. Can the rule-based sharing be used for customer community users?
3. What is the support you need in the data model in order to allow access to a particular object to a customer community user?
4. How are sharing capabilities available to community user licenses differs from full license users?
5. How does selection of community licenses impact your sharing model?
6. Do you set up profiles for proper permissions to object?

Solution

Best Solution Overview

- Sharing set based on case account.
- What are the alternate solutions available?

Detailed Steps for Solution

1. Follow the prerequisite steps and make sure a working community is established and you are able to log in to the community as a test user.
2. Set up up a sharing set:
    - From setup quick search, search for Community Settings and click on it.
    - Scroll down to the Sharing Set section and click **New**.
    - Fill out the required fields.
    - Select profiles, e.g., **Customer Community User**.
    - Select objects, e.g. **Case**.
    - In the Configure Access section, click **Set up link** under the Action column next to the Case object.
    - Setup following rule to
        □ Grant Access Where:
        □ User → Contact.Account
        □ Matches
        □ Target Case → Contact.Account
        □ Access Level: Read/Write

3. When a Customer Community User creates a new case, the customer community user is **not** the owner of the case, but that user is set as contact on the case.
4. This sharing set allows the Customer Community User to access the case where he/she is a contact and their contact.account matches the case.contact.account.
5. Once the case is created, any assignment rules for a specialty group will fire and assign the case ownership to the specialty queue. This will provide visibility to case for all the members of that specialty queue.
6. Any member of that queue can then select and accept that case and will be made the owner of that case, can work on the case, and close the case for the customer. This is the reason customer community user cannot be owner of case.
7. **Bonus Exercise**: If there are auto response rules setup for cases, the customer community user will be notified via email as the case status changes. The customer community user also has the option to log in to the community to view case comments and case status.

Test your solution

1. Before you begin your test, make sure prerequisite steps are followed and you have two users to test with: one as customer community user and one as specialty service engineer [internal user.]
2. Log in as a customer community user into the customer community and create a case.
3. The case will be visible to you as a customer community user in your Cases tab.
4. Log in as the specialty service engineer in the Salesforce org and accept the new case from the queue and take ownership of it.
5. Observe that the new case contact lookup field is set as the community user contact.
6. Update the status and comments on the new case.
7. Log in as the community user again and check the updated case status and comments.

NOTE:
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Note: Ensure that all the detailed requirements are met while testing your solution.

2. Partner Communities

Use Case

The computing division of Universal Containers is divided into Sales and Service organizations reporting to the CEO. They are currently using Accounts, Contacts, Cases, and Opportunities functionality in Salesforce.

- 15,000 Direct Sales representatives are organized hierarchically by geography.
  - □ Executive Vice President (VP) of Global Sales.
  - □ Senior VPs of each major region: APAC, EMEA, AMER.
  - □ Divisional VPs of each region's countries (e.g., USA, Canada, etc.). There are 127 countries that Universal Containers operates in.
  - □ District Managers for each major territory/state in each country. There can be up to 30 territories per country, with an average of 10.
  - □ Sales Representatives that report to each District Manager. Sales Reps typically operate at a city or local region level.

- 10,000 Channel Representatives report to the Executive VP of Global Sales and are organized by Partner Tiers:
  - □ Premium Partners
  - □ Resellers

- There are over 500 service engineers that form part of a Customer Service organization that are organized by two major product functions, with a manager of each major function:
  - □ Hardware
  - □ Software

- Each function has up to 25 specialty teams (e.g., Hardware – Desktops, Hardware – Laptops, etc.) and users can work in more than one team. A team usually consists of 25 users.
- Sales reps at the city/local region level will own accounts and opportunities. Reporting will roll up through their district manager up to the Executive VP of Sales.
- Channel reps will own partner accounts.
- Opportunities are initially only visible to the Sales Rep that owns the opportunity.
- Users in the Sales organization (Channel and Direct Sales reps) only have access to the accounts they own, as well as the accounts that are owned by their subordinates.
- Users should have the same access to contacts as they do to the contact's related account.

- Direct Sales reporting needs to roll up from the DM to the Executive VP of Sales.
- Channel Sales reporting rolls-up by Partner Tier to the Executive VP of Sales.
- Customer Service engineers reports roll up by product function only (e.g., hardware and software). There is no requirement to roll up reporting from specialty teams to the product function level.

Detailed Requirements

- The computing division of Universal Containers needs to perform joint-selling activities with their channel partners. They currently have 50,000 partners in their database.
- Partners are typically structured into two levels: the partner representative and their manager.
- When a Channel Rep at Universal Containers identifies an opportunity for a partner, they will create that opportunity and they will assign a given partner rep as the owner of that opportunity.
- Partners can view the accounts for the opportunities they have access to.
- Reporting will roll up from the partner user to their immediate manager and then into the internal Universal Containers Channel Rep hierarchy.
- Partner users have access to opportunities owned by their peers.

Prerequisite Setup Steps

- Assume that Partner Community licenses are being used.
- Set up the Partner Community with content and membership.
  - □ Set up a community base domain and make sure the domain name has been propagated. This may take up to 24 hours.
  - □ After clicking **Setup**, type Communities in the quick search. Click **Communities Settings**.
  - □ Under the section for Community Role and User Settings:
    - o Select **2** from the drop-down to allow two-level role hierarchy on the partner side to meet the requirements.
    - o Enable Partner Super User Access.
  - □ Create a partner community under that base domain name. For example, if your base community domain url is https://mycommunity.force.com/ then your partner community site could be https://mycommunity.force.com/partner.
  - □ Add tabs like Accounts, Opportunities, Cases, etc.
  - □ Set up the membership for the community by assigning a specific profile--a partner community profile or one cloned from it.
  - □ Create a partner account and enable the account for the partner community. Make sure the owner of this partner account is an internal user that is going to be a Channel Rep at Universal Containers. All the channel partner managers will roll up in Role Hierarchy to a Channel Rep. The Channel Rep is an internal user and the Channel Partner Manager is external partner Community user (enabled via contact on the partner account, explained in the next step.) The Partner Rep is the lowest-level role. The role hierarchy looks like this:

    - o Channel Rep (internal user)
      - ▪ Partner Manager – external Partner Community user (with partner manager role)

Partner Rep – external Partner Community user (with partner user role)

- □ Add two contacts under that account: one for the partner manager user and one for the partner user.
- □ Enable the contact for Partner Community access (this will add a user with a Partner Community user profile). When you are adding the user, make sure you are selecting the right partner role from the 2-level partner role hierarchy you set up.

Considerations

1. How are sharing capabilities available to partner users differ from full license users?
2. Describe how the partner role hierarchy is implemented relative to the internal role hierarchy. Who has visibility to the data owned by partners?
3. How does the number of levels in the partner role hierarchy affect scalability?
4. Why did you choose to use Super User Access or sharing rules for the requirement for users in the "User" partner role?
5. Do you set up profiles for proper permissions to objects?

Solution

Best Solution Overview

- Two-level partner role hierarchy.
- Implicit access from Opportunity to Account (no configuration).
- Super User Access for partners; sharing rules are not scalable.

Detailed Steps for Solution

1. Follow the prerequisite steps and make sure a working community is established and you are able to log in to the Partner Community as a test user.
2. When an internal Channel Rep User creates a new opportunity, no one can see that opportunity, as the OWD is private.
3. The Channel Rep [internal] user then assigns the Opportunity record to a specific Partner Rep [who is an external Partner Community user], making that user owner of the Opportunity. Since that user is lowest in the partner role hierarchy, his manager and internal channel rep user (who are both higher in the role hierarchy than the Partner Rep user) can see the opportunity owned by that Partner Rep.
4. The Channel Rep [internal] user is still the owner of the Partner Account. This should never change.
5. Partners can view the account for the opportunity they are assigned to based on implicit sharing; this is a different account than the partner account.

> **NOTE:**
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> Note: A partner account is used for enabling partners and partner users. An opportunity account is created so that the partner can do business with said opportunity.

Test your solution

1. Before you begin your test, make sure the prerequisite steps are followed and that you have three users to test with: a Chanel Rep internal user, a Partner Manager external Partner Community user with a partner manager role, and a Partner Rep external Partner Community user with a partner user role.
2. Log in as the Chanel Rep internal user and create an opportunity record.
3. Assign the opportunity record to the Partner Rep User, the lowest level in the partner role hierarchy.
4. Log in to the Partner Community as the Partner Rep user and ensure you can see the opportunity and opportunity account details for the Opportunity record that was assigned to the Partner Rep user.

5. Log in to the Partner Community as the Partner Manager user and ensure you can see the opportunity and opportunity account details for the Opportunity record that was assigned to the Partner Rep user.
6. Now add a second Partner Rep user and enable that user for the Partner Community with a Partner Rep role--again, the lowest in the partner hierarchy.
7. Via the Channel Rep internal user, create another opportunity record and assign it to the Partner Rep2 user.
8. Log in as the Partner Rep1 user and you should be able to see the opportunity that was assigned to the Partner Rep 2 user.

NOTE:

NOTE: Ensure that all the detailed requirements are met while testing your solution

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3. Customer Communities: Moderation

> **1.3** Demonstrates an understanding of the differences in sharing capabilities for partner, customer, and employee community users and is able to articulate the impact of selecting a community license type on the sharing solution.

Use Case

Universal Comics wants a Customer Community for its users to manage their monthly subscriptions, collaborate with other community members, open service requests, and ask questions or respond to questions asked by other community members.

Detailed Requirements

1. Branded login screens with company logo.
2. Upon first logging in, user is presented with Accept Terms and Conditions. Accepting would take them to the home page, while rejecting it would log them out and take them back to the login page.
3. Restrict files uploaded within the community to 5 MB and allowing only DOC, DOCX, PDF, RTF, ODT, and TXT.
4. Report abusive comments, posts, or files uploaded.
5. Should be able to give Thanks and Kudos to each of the community users. Also the same should be visible on the user profile.
6. Should have access to FAQs and community updates.
7. Community members should be able to ask questions of other community members.
8. Community Manager should be able to convert unanswered questions to cases.
9. Compliance Manager should be able to see all the reported posts and files in one place.
10. Community members should be able to vote on ideas posted by other community members or post something of their own.
11. Community members should be able to track support requests raised by themselves.
12. Community members should be able to maintain their contact information themselves.
13. Community Members should be able to log in using their Facebook or Twitter credentials.
14. Community Members should be able to self-register.

Prerequisite Setup Steps

- Ensure that Communities are enabled.

Considerations

1. What type of Community license should be used and why?
2. What are custom login flows? Can we set up a login flow per profile?
3. Describe Community moderation features.
4. Describe data visibility in the community.
5. Describe how data is secured within Communities. How is access granted to a Community user?
6. Describe the purpose of Chatter answers.
7. Describe the purpose of Ideas.
8. Describe purpose of Salesforce Knowledge.

Solution

Best Solution Overview

Considerations Solutions

1. What type of community license should be used and why?
   a. Customer Community should be used. You can compare licenses on this
      [webpage](#).

2. What are Custom Login Flows? Can we set up a login flow per profile?
   a. Explore Custom Login Flows [here](#).

3. Describe Community moderation features.
   a. Here is an [overview](#).

4. Describe data visibility in a Community.
   a. Communities contain various types of [users](#) who require varying levels of access.
      What users see depends on their user type and which tabs the administrator
      selects when creating the community.

5. Describe how data is secured within communities. How access is granted to a
   community user?
   a. Grant community users access to records that are associated with their accounts
      or contacts using [sharing sets (Trailhead),](#) based on their user profiles.

6. Describe the purpose of Chatter answers.
   a. Chatter Answers brings together Case, Questions and Answers, and Salesforce
      Knowledge articles in a unified experience.

7. Describe the purpose of Ideas.
   a. [Ideas](#) is a community of users who post, vote for, and comment on ideas. An
      Ideas community provides an online, transparent way for you to attract, manage,
      and showcase innovation.

8. Describe the purpose of Salesforce Knowledge.
   a. [Salesforce Knowledge](#) lets you create and manage your company information
      and securely share it when and where it is needed.

Detailed Solution Steps

1. Branded login screens with company logo.
   a. Set logo at **Manage Communities | Administration | Login & Registration | Header Logo**.

2. Upon first logging in, the user is presented with Accept Terms and Conditions. Accepting would take them to the home page, while rejecting them would log them out and take them back to the login page.
   a. Utilize Login Flow to present Terms & Conditions.
   b. Alternative: Create a Visualforce page and use a Communities Landing Controller to redirect to this custom Visualforce page.

3. Restrict files uploaded within the community to 5 MB and allow only DOC, DOCX, PDF, RTF, ODT, and TXT.
   a. Set these values under **Manage Communities | Administration | Preferences | Files**.
   b. Alternative: Utilize a trigger to control file size and extensions.

4. Report abusive comments, posts, or files uploaded.
   a. Configure moderation rules and criteria at **Manage Communities | Administration | Moderation**. Upload a list of profane words and set rules to block those words.
   b. Alternative: Create triggers on FeedItem and FeedComments.

5. Should be able to give Thanks and Kudos to each of the community users. Also the same should be visible on the user profile.
   a. Enable Work.com and Configure Badges.

6. Should have access to FAQs and community updates.
   a. Enable Knowledge and create two article types: FAQ and News.
   b. Alternative: Use custom objects to achieve similar functionality. It would be a highly customized solution.

7. Community members should be able to ask questions of other community members.
   a. Setup Chatter answers and add it to communities.

8. The Community Manager should be able to convert unanswered questions to cases.
   a. If a question in Chatter Answers isn't resolved or its replies aren't satisfactory, administrators and trusted community members such as moderators can escalate the question to a case.

9. Compliance Manager should be able to see all the reported posts and files in one place.
   a. Create a permission set and grant permissions to the Compliance Manager.

10. Community members should be able to vote on ideas posted by other community members or post something of their own.
    a. Enable Ideas in the Customer Community.

11. Community members should be able to track support requests raised by themselves.
    a. Expose Cases to community. Grant access to Cases using a sharing set.

12. Community members should be able to maintain their contact information themselves.
    a. Expose Accounts to the community. Grant access to Accounts using a sharing set.

13. Community Members should be able to log in using their Facebook or Twitter credentials.
    a. Set up Facebook and Twitter Auth Provider and choose these two Auth Providers for community login.

14. Community Members should be able to self-register.
    a. Enable self-registration in communities.

Request a Practice Org

To request a Practice Org that contains information from some of the Build Materials, please click here to open a case.

Select Question Type: Architect Support

Question Detail: Request Practice Org

 ALERT: If you are not active within your practice org for 6 months, it may be deactivated.

Salesforce Architect Success Group

- Want to make sure you don't miss any content release updates or news regarding the Salesforce Architect Journey?
- Looking to connect with others that have the same interest?

Click here and request to join the Salesforce Architect Success Group.