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# Salesforce Customer Portal Implementation Guide

Salesforce, Spring '20






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# CUSTOMER PORTAL IMPLEMENTATION

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

The Salesforce Customer Portal enables you to fully exploit the capabilities of the Web as the ideal channel to deliver superior self-service while at the same time lowering the cost of serving your customers. Because the Customer Portal is hosted by Salesforce just like the Salesforce application itself, you get the same service delivery benefits and none of the maintenance and infrastructure headaches that come with hosting a portal yourself.

 **Note:** The Service Cloud Portal is the Customer Portal intended for many thousands to millions of users. Service Cloud portal users are *high-volume portal users*. For more information, see [About High-Volume Portal Users](#) on page 27.

Some of the high-level features included in the Customer Portal are:

## User Interface

The full power of Salesforce's award-winning user interface is available to your customers in the Customer Portal. Popular capabilities such as advanced search, quick create, and recently used items create a superior customer experience. You can also personalize the user interface for each user or user group so your customers are presented with the precise information they need.

## Salesforce CRM Content

Provide access to product documentation and other relevant content to your customers, including features such as subscriptions, comments, and ratings.

## Custom Objects and Tabs

Create and deliver entirely new self-service processes—going well beyond cases and solutions—with custom objects and tabs. You can expose custom objects and tabs created in Salesforce to your customers in the Customer Portal to meet the unique customer service and support requirements of your organization and your industry.

## Multiple User Profiles and Record Types

Provide a personalized experience to different accounts and customer segments using configurable portal user profiles and record types.

## Account Role Hierarchy and Sharing

You can use a three-level role hierarchy inside each customer account to give executive and manager-level users access to data owned by users below them in the hierarchy. In addition, you can create sharing rules to allow portal users to share data with other users.

## Branding and Style Configuration

You can quickly brand your customer portal by customizing the home page, header, and footer as well as changing the portal colors and fonts with an easy-to-use style editor.

This guide outlines the necessary steps to set up and use Customer Portal. The guide is divided into the following major sections:

### Customer Portal Preparation

Make sure your organization is ready for a Customer Portal.

### Customer Portal Setup

Configure Salesforce to allow your customers to use the Customer Portal.


### Setting Up Customer Portal Users

Configure Salesforce to manage your portal users.

**Customer Portal Reporting**

Use Customer Portal reporting features to make the most of your Customer Portal.

# CUSTOMER PORTAL PREPARATION

-  **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.
- Existing orgs using Customer Portal licenses may continue to use their licenses.

We recommend you complete the following steps before you implement your organization's Salesforce Customer Portal:

**1. Building and Publishing Public Solutions**

Build your company's public solutions.

**2. Identify Customer Portal Users**

Decide which customers will be able to use the Customer Portal.

**3. Configure Your Organization's Sharing Model**

Ensure that Customer Portal users can only view and edit data related to their accounts.

**4. Customize and Distribute the Portal Tip Sheet**

Edit the portal tip sheet and distribute it to customers.

## Building and Publishing Public Solutions

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Using your Customer Portal, your customers will be able to search public solutions to find answers to their questions and problems. Public solutions will consist entirely of solutions that your Customer Support team has created in Salesforce.

We recommend you complete these steps to build public solutions:

**Formalize a standard structure for all solutions in Salesforce**

Use a consistent format when creating your organization's solutions. Every Customer Support representative should be familiar with and able to create solutions using this format.

Please refer to the *Tips & Hints for Solutions* document for recommendations on structuring solutions (available in the *Tips* section of the Salesforce online help).

**Translate solutions into multiple languages**

Enable multilingual solutions so that users can create and translate solutions into multiple languages. Then, when your customers log into your Customer Portal, they can view solutions in their preferred language. Customers can also choose to view solution search results in a specific language or all supported languages via a language drop-down list.

**Create solutions to answer the most commonly asked questions**

Since your customers will be using the Customer Portal to find answers to common issues, it is a good idea to create a solution for each of your organization's FAQs.

Any standard user of Salesforce has access to create solutions, although you may decide to assign this initial task to a select group of Customer Support representatives.

**Finalize the solution review process**

To maintain a high level of quality for your public solutions, it is a good idea to standardize the review process for solutions. We recommend that you use three Solution Status values as follows:

### Recommended Solution Status Values

| Status         | Meaning  |
|----------------|--|
| Draft          | Default status for all new solutions.  |
| Review Level 1 | <p>Solution Managers review all Draft solutions to:</p> <ul style="list-style-type: none"> <li>• Check for duplicates</li> <li>• Make the solution complete</li> <li>• Review the solution structure</li> <li>• Remove references to any specific customer</li> <li>• Add content if necessary</li> </ul> <p>Status should then be changed to Review Level 1.</p>  |
| Review Level 2 | <p>Senior Solution Managers review all Review Level 1 solutions to determine whether the solution should be published to the Customer Portal.</p> <p>Status should then be changed to Review Level 2 and the <code>Visible in Self-Service Portal</code> checkbox selected.</p> <p>The <code>Status</code> picklist field on a solution does not need to be set to Reviewed for a solution to be visible in the Customer Portal; a solution is visible in the Customer Portal if the <code>Visible in Self-Service Portal</code> checkbox is selected on a solution.</p> |

 **Note:** We recommend that you decide which Solution Managers will be responsible for publishing solutions.

 **Tip:** You can create approval processes to automate the solution review process for your organization. For details, see Approvals in the Salesforce Help.

#### Categorize approved solutions

Use solution categories to group similar solutions together, enabling customers to browse through and search relevant categories for solutions that answer their questions.

We recommend that you limit the number of categories to which a solution belongs. If you put solutions into only the most relevant categories, they will be easier for users and customers to find.

If your organization uses multilingual solutions, we recommend that you use the translation workbench to translate categories into multiple languages. Translated solutions inherit the categories of their master solution.

See the Salesforce online help for more information about defining your categories, categorizing individual solutions, and translating categories.

#### Track the history of solution fields

Select which standard and custom fields to track on the Solution History related list to see when and how users modified any solution.

#### Publish approved solutions

Only published solutions will be available on the Customer Portal. You will need to identify the solutions you want to make available, edit the solutions individually, and select the `Visible in Self-Service Portal` checkbox to publish each solution.



## Identifying Customer Portal Users

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The customers who will be using the Customer Portal portal are referred to as “Customer Portal users.” You should decide whether you want to offer Customer Portal access to all customers or only to a select group of customers, for example, customers with Gold Support.

### Identify the customers to whom you will grant Customer Portal access

You can create a report in Salesforce or use other customer lists to identify which customers should have access to the Customer Portal.

### Create a contact or person account record for each Customer Portal user

Make sure that each contact or person account contains a valid email address.

## Configuring Your Organization's Sharing Model

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Configure your organization's sharing model so that portal users can only access data associated with their accounts:

### Set the organization-wide defaults in your organization's sharing model

Set the organization-wide defaults in your organization's sharing model to Private on accounts, contacts, contracts, assets, and cases. This ensures that Customer Portal users can only view and edit data related to their accounts. For more information, see [Set Your Organization-Wide Sharing Defaults](#).

To maintain Public organization-wide default behavior for Salesforce users while ensuring that portal users can only view and edit data related to their accounts, you can create self-referencing sharing rules of “All Internal Users” to “All Internal Users.” For more information, see [Sharing Rules](#).

### Set sharing rules for Customer Portal users

If your organization uses sharing rules that share to Roles, Internal and Portal Subordinates, update those sharing rules to share to Roles and Internal Subordinates instead. This is to help ensure that no records or folders owned by a Salesforce user are shared with a portal user.

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

You can easily convert sharing rules that include Roles, Internal and Portal Subordinates to include Roles and Internal Subordinates instead by using the Convert Portal User Access wizard. Furthermore, you can use this wizard to convert any publicly accessible report, dashboard, and document folders to folders that are accessible by all users except for portal users.

## Customizing and Distributing the Portal Tip Sheet

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If you want to provide your customers with information about how they can answer their own inquiries using your Customer Portal:


### Download and edit the tip sheet provided by Salesforce

Download the [Using the Self-Service Portal](#) tip sheet. Edit the tip sheet to match the branding and features in your Customer Portal, such as suggested solutions and the ability to attach files to submitted cases.

### Distribute the tip sheet to customers

Email or post the tip sheet to your website so that customers who want to learn how to answer their own inquiries can do so.

# CUSTOMER PORTAL SETUP

-  **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.
- Existing orgs using Customer Portal licenses may continue to use their licenses.

Follow the steps below to set up and configure your organization's Salesforce Customer Portal.

- 1. [Enable Your Customer Portal](#)**  
Enable your Customer Portal so that you can begin customizing it.
- 2. [Enabling Customer Portal Login and Settings](#)**  
Configure the settings and communication templates of your Customer Portal.
- 3. [Customize Your Customer Portal Fonts and Colors](#)**  
Customize the fonts and colors of your organization's Customer Portal pages to match your organization's branding.
- 4. [Customize Your Customer Portal Tabs](#)**  
Optionally, choose tabs and the order in which they display to Customer Portal users.
- 5. [Customize Your Customer Portal Pages](#)**  
Define page layouts for your Customer Portal.
- 6. [Review Setup Tips and Considerations for Customer Portal Pages](#)**  
Review set up tips and considerations for your Customer Portal pages.
- 7. [Customize List Views](#)**  
Customize the list views available to Customer Portal users.
- 8. [Customize Search Layouts](#)**  
Customize the search layouts available to Customer Portal users.
- 9. [Set up Case Assignment Rules](#)**  
Set up case assignment rules to automatically assign cases created by portal users to Salesforce users and queues.
- 10. [Create Workflow Alerts](#)**  
Create workflow alerts to automatically respond to portal users when they create a case on your Customer Portal.
- 11. [Configure User Access to the Customer Portal](#)**  
Set up specific user functionality before enabling users to access your Customer Portal.
- 12. [Grant High-Volume Portal Users Access to Objects' Records](#)**  
Set up the level of access high-volume portal users have to objects in your Customer Portal. This is only necessary if you plan on using high-volume portal users.
- 13. [Share Records Owned by High-Volume Portal Users to Salesforce Users](#)**

Choose which Salesforce users can access records owned by high-volume portal users. This is only necessary if you plan on using high-volume portal users.

#### 14. Enable Your Customer Portal for User Login

Turn on your Customer Portal for users.

#### 15. Add the Customer Portal URL to Your Organization's Website


Add the Customer Portal `Login` URL to your organization's website so that your customers can navigate to the portal.

#### 16. Enable Contacts and Person Accounts to Use Your Customer Portal


Enable your customers to use your Customer Portal and provide them with a Customer Portal username and password.

 **Note:** You must have the "Customize Application" permission to set up and modify the Customer Portal.

If you have Enterprise, Unlimited, or Performance Edition, you can create a single copy of your organization in a separate environment to test your customizations to make sure they function the way you expect before implementing them in your Salesforce organization. For details, see [Create a Sandbox](#).

 **Tip:** If you've set up a Lightning Platform site, you can let users register for or log into your Customer Portal from your site. You can publicly expose any information stored in your organization through a branded URL of your choice. You can also make the site's pages match the look and feel of your company's brand. See "Salesforce Sites" and "Associate a Portal with Salesforce Sites" in the Salesforce online help.

## Enabling Your Customer Portal

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

To enable the Salesforce Customer Portal:

1. From Setup, enter *Customer Portal Settings* in the `Quick Find` box, then select **Customer Portal Settings**.
2. Click **Edit**.
3. Select `Enable Customer Portal`.
4. Click **Save**.
5. Continue [setting up the portal](#).

## Tips on Enabling the Customer Portal

Consider the following when enabling the Customer Portal:

- After you enable the Customer Portal, you can [create multiple Customer Portals](#) to satisfy the various business needs of your customers.
- These items become available after you enable the Customer Portal:
  - The High Volume Customer Portal, Authenticated Website, Customer Portal Manager, and Customer Portal User profiles, if you purchased [user licenses](#) for them.
  - The **Enable Customer Portal User** and **View Customer Portal User** buttons on contact and person account records.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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


### USER PERMISSIONS

To enable the Customer Portal:

- [Customize Application](#)


- The All Customer Portal Users and All Internal Users groups along with the Roles and Internal Subordinates sharing rule category.
- After you enable a Customer Portal, you cannot disable it. However, you can prevent users from logging into it. See [Enable Customer Portal Login and Settings](#).

## Enable Customer Portal Login and Settings

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

1. From Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Click **Edit** next to the name of the Salesforce Customer Portal you want to customize.
3. Set the following options:

| Setting       | Description  |
|---------------|--|
| Name          | <p>Name of the Customer Portal as displayed on the portal's detail and edit pages, as well as the Customer Portal Setup page. The name of the Customer Portal is not displayed on portal pages, but it does display in the browser title bar.</p> <p>The name of your portal must be unique for your organization and not already in use by a Customer Portal or partner portal. Furthermore, an error may occur if you name a Customer Portal "partner portal" Customer Portal</p>                        |
| Description   | <p>A description of the Customer Portal as displayed on the portal's detail and edit pages. The description of the Customer Portal is not displayed in the portal.</p>   |
| Login Enabled | <p>Allows users to log in to the Customer Portal.</p> <p>We recommend that you do not select this checkbox until you have completed the steps described in <i>Setting Up Your Customer Portal</i>.</p> <p> <b>Note:</b> Users must be able to log in to the Customer Portal, be within their user profile's restricted IP range, and be within designated Login Hours in order to be able to reset their passwords.</p> |

### EDITIONS


Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To enable login and settings for the Customer Portal:

- Customize Application

| Setting       | Description  |
|---------------|--|
| Administrator | <p>Click the lookup icon (  ) to choose a default administrator for your Customer Portal. All email notifications regarding users who self-register for your Customer Portal will be sent to this Salesforce user.</p> <p>Notifications include information about registration errors and any other issues self-registering customers may experience, such as inadvertently entering duplicate email addresses, creating duplicate contact records, and exceeding your organization's user license limit.</p> <p>When choosing an administrator for your Customer Portal, you can only select users that have the "Edit Self-Service Users" permission. Furthermore, you cannot deactivate a user selected as a portal administrator.</p> |

### Portal Default Settings

| Setting                       | Description   |
|-------------------------------|---|
| Login URL                     | <p>The URL of the Web page that displays when users log in to your Customer Portal.</p> <p>You can click this URL to log in to your portal and interact with it.</p> <p>Insert this URL into your website so users can access the login page to your Customer Portal.</p> <p>The login URL of each Customer Portal you create contains a unique identifier, such as <code>portalId=060D00000000Q1F</code>. The unique identifier determines the specific portal a user can access. If a user accesses a login URL that does not contain a unique identifier, they are automatically directed to the login URL of the first Customer Portal you created. Note that portal users can only log into a Customer Portal via the portal's login page and not through the Salesforce login page.</p> |
| Logout URL                    | <p>The URL of the Web page that displays when users log out of the Customer Portal—for example, "http://www.acme.com." If a logout URL is not specified, portal users return to the login page when they log out.</p>   |
| Top-Level Category for Portal | <p>The top-level category accessible by customers in the Customer Portal. Customers can view all solutions marked <code>Visible in Self-Service Portal</code> in this category and its subcategories.</p> <p>This field is available only if you have enabled solution browsing. See <a href="#">Customizing Solution Settings</a>.</p>   |

### Portal Default Settings


| Setting   | Description  |
|---|--|
| Enable Self-Close Case from Suggested Solutions | Allows users to close cases in the Customer Portal directly from suggested solutions. For example, when a user views a suggested solution that helps them solve a case, he or she can click <b>Yes, please close my case</b> if this setting is enabled.   |
| Show Action Confirmation                        | Allows users to view confirmation messages after they complete an action in the Customer Portal. For example, after a user creates a case in your Customer Portal, he or she views the message "Case has been submitted" if this setting has been enabled.<br><br>Confirmation messages may help users clearly understand actions they have completed in your Customer Portal. |
| HTML Messages Default Language                  | Specifies the language that portal HTML messages are displayed in when custom language portal HTML messages are not configured. This setting is only available for organizations that have multiple languages enabled.   |


### Email Notification Settings

| Setting                | Description  |
|------------------------|--|
| From Email Address     | The email address from which all Customer Portal communication templates are sent—for example, "support@acme.com." Salesforce sends the emails automatically, but they appear to portal users as if they were sent from this email address. If a portal user responds to a communication template, the response is sent to this address. |
| From Email Name        | The name associated with the "From" Email Address—for example, "Acme Customer Support."  |
| New User Template      | The email template used to send a username and initial password to all newly enabled and self-registering Customer Portal users. By default, a sample template is automatically selected for you. You can also create your own template or modify the sample. Be sure to mark the template as <code>Available for Use</code> .           |
| New Password Template  | The email template used to send a new password to existing Customer Portal users when you reset their passwords. By default, a sample template is automatically selected for you. You can also create your own template or modify the sample. Be sure to mark the template as <code>Available for Use</code> .                           |
| Lost Password Template | The email template used to send a new password to existing Customer Portal users when they reset their own passwords by clicking <b>Forgot your password?</b> on the login page of the Customer Portal. By default, a sample template is automatically   |



## Email Notification Settings

| Setting                              | Description  |
|--------------------------------------|--|
|                                      | selected for you. You can also create your own template or modify the sample. Be sure to mark the template as <code>Available for Use</code> .   |
| New Comment Template                 | The email template used to send a notification to Customer Portal users when a public comment is added to one of their cases. This template must be marked as <code>Available for Use</code> .     |
| Change Owner to Portal User Template | The email template used to send a notification to Customer Portal users when they become the new owner of a record in the portal. This template must be marked as <code>Available for Use</code> . |




 **Note:** You can standardize the communication templates sent to the users of all your Customer Portals by clicking the **Set Default Email Templates for All Customer Portals** link on the Tools section of the Customer Portal Setup page. For more information, see [Creating Multiple Customer Portals](#).

 **Tip:** If you plan to use the same communication template for different objects, such as the Change Owner to Portal User Template, we recommend that you include text and merge fields on the template that are appropriate for both objects. For example, if your organization has a Warranty custom object and a Training custom object, and you want to use the Change Owner to Portal User Template for both, the text and merge fields on the template should read: "A new record has been assigned to you. Id: {!Training.ID}{!Warranty.Id}." When the template is sent, only the relevant merge fields will display.

## Look and Feel

| Setting | Description   |
|---------|---|
| Header  | <p>A text or HTML file that allows you to incorporate your organization's branding into the header of your Customer Portal. Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p> <p>We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.</p> <p>You can position the logout link anywhere on the header by using the HTML tag: "<code>&lt;a href="/secur/logout.jsp"&gt;Logout&lt;/a&gt;</code>."</p> |
| Footer  | <p>A text or HTML file that allows you to incorporate your organization's branding into the footer of your Customer Portal. Click the lookup icon () to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The files you include in the <code>Header</code> and <code>Footer</code> lookup fields can have a combined size of up to 10 KB.</p>  |

## Look and Feel

| Setting       | Description   |
|---------------|---|
| Logo          | <p>An image file that allows you to incorporate your organization's branding into the top left header of your Customer Portal. Click the lookup icon (  ) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab and marked as an <code>Externally Available Image</code>.</p> <p>The file you include in the <code>Logo</code> lookup field can be up to 20 KB.</p> <p>We recommend that you do not add a header <i>and</i> a logo to your portal because they may not display properly together.</p>   |
| Login Message | <p>A text or HTML file that allows you to incorporate your organization's branding into the header of the login page, forgot password page, and change password page of your Customer Portal. Click the lookup icon (  ) to choose a file that has been uploaded to a publicly accessible folder on the Documents tab.</p> <p>The file you include in the <code>Login Message</code> lookup field can be up to 2 KB.</p> <p> <b>Note:</b> JavaScript and CSS code are automatically removed from HTML files used as the portal login message.</p> |

## Self-Registration Settings

| Setting                   | Description   |
|---------------------------|---|
| Self-Registration Enabled | <p>Allows existing contacts to register themselves for access to your Customer Portal.</p> <p>When you select this checkbox and add the <code>Allow Customer Portal Self-Registration</code> checkbox to contact page layouts, contacts whose records are marked <code>Allow Customer Portal Self-Registration</code> can view a self-registration area on the Login page of your Customer Portal. From the self-registration area, users can enter their email address and click <b>Submit</b> to receive an automatically assigned username and password for logging in to your Customer Portal. Other email notifications sent to users regarding their registration status include:</p> <ul style="list-style-type: none"> <li>Existing user, from which the user can enter another email address or click a <b>Forgot Password?</b> link to retrieve his or her password.</li> <li>New user, which informs the user that the email address he or she submitted does not match an existing contact in your</li> </ul> |



## Self-Registration Settings


| Setting                     | Description  |
|-----------------------------|--|
|                             | <p>organization. If an administrator has implemented <a href="#">Web-to-Case</a> or Web-to-Lead to capture new user information, then the user can click a link to enter his or her information on the appropriate form.</p> <ul style="list-style-type: none"> <li>• Internal error, which informs the user that an error occurred during the self-registration process and that your portal's administrator has been notified about the error.</li> <li>• Ineligible user, which informs the user that he or she is not eligible for self-registration to your Customer Portal. This notification is sent when a submitted email address matches a contact that does not have the <code>Allow Customer Portal Self-Registration</code> checkbox selected. It is also sent when a submitted email address does not match any contacts, and your administrator has not set up Web-to-Lead or Web-to-Case to capture new user information.</li> </ul> <p>Ensure that all required custom fields on users have default values. Otherwise, users who self-register for your Customer Portal will receive an error message.</p> <p>Note that person account users cannot self-register for your Customer Portal. When person account users self-register for your Customer Portal, they receive an email notification that instructs them to contact the portal administrator.</p> |
| New User Form URL           | <p>Allows you to specify the URL of a Web-to-Lead or Web-to-Case form for users who self-register for access to your Customer Portal.</p> <p>The URL to this form is offered via the template selected in the <code>Registration Error Template</code> field to self-registering users who lack an existing contact record, so that their information can be captured and converted to a contact.</p>  |
| Registration Error Template | <p>The email template sent to users who self-register for your Customer Portal, but experience a registration error, or need to complete a Web-to-Case or Web-to-Lead form to register for your portal. By default, a sample template is automatically selected for you. You can also create your own template or modify the sample. Be sure to mark the template as <code>Available for Use</code>.</p> <p>The <code>From Email Address</code> and <code>From Email Name</code> fields on Customer Portal settings specify who this template is sent from.</p>  |

**Self-Registration Settings**

| Setting                  | Description   |
|--------------------------|---|
| Default New User License | Click the lookup icon (🔍) to choose a default portal user license for users who self-register for your Customer Portal.   |
| Default New User Role    | Click the lookup icon (🔍) to choose a default portal role for users who self-register for your Customer Portal.   |
| Default New User Profile | Click the lookup icon (🔍) to choose a default portal profile for users who self-register for your Customer Portal.<br>You cannot delete the profile selected as the default portal profile. |

- Click **Save** to save your Customer Portal settings.

## Customize Your Customer Portal Fonts and Colors

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

You can customize the fonts and colors of the Salesforce Customer Portal to reflect your company's branding. Your portal's fonts and colors are specified in a portal "color theme." Select a predefined color theme and, optionally, customize it to better match your branding. You can click the **See examples** link to see all of the theme attributes you can customize.

- From Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
- Select the name of your Customer Portal.
- Click **Change Portal Fonts and Colors**.
- Select a color theme from the **Color Theme** drop-down list. Select **Custom** from the **Color Theme** drop-down list to create your own theme from scratch. A preview of the color theme you select is automatically displayed in the **Preview** sections.
- Optionally, customize the color of any theme you select by either:
  - Entering a hexadecimal value into any theme attribute, or
  - Clicking the hexadecimal value of any theme attribute and selecting a color from the point-and-click editor

When you customize a theme, it is automatically renamed **Custom** when saved. You can customize the following options, which, when customized, automatically display in the **Preview** sections:

**Tab Styles**

| Theme Attribute  | Description                                |
|------------------|--|
| Current Tab Text | Text color of the tab users have selected. |

**EDITIONS**

Available in: Salesforce Classic ([not available in all orgs](#))

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

**USER PERMISSIONS**

To change the fonts and colors of the Customer Portal:

- Customize Application

**Tab Styles**

| Theme Attribute        | Description   |
|------------------------|---|
| Current Tab Background | Background color of the tab users have selected.      |
| Current Tab Border     | Border color of the tab users have selected.          |
| Other Tab Text         | Text color of the tabs users have not selected.       |
| Other Tab Background   | Background color of the tabs users have not selected. |
| Other Tab Border       | Border color of the tabs users have not selected.     |
| Tab Bar Background     | Background color behind all tabs.                     |

**Page Styles**

| Theme Attribute  | Description  |
|------------------|--|
| Page Background  | Portal background color, excluding search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.  |
| Text             | Text color, size, and font on all portal items, except for tabs, buttons, headers, and field labels.<br><br>Optionally, you can change the number in the percent field to increase or decrease the size of all portal items. Additionally, you can change the font of all portal items, except for tabs, buttons, headers, and field labels from the drop-down list. |
| Field Label Text | Text color of the field names on records.<br><br>Optionally, you can change the font of the text from the drop-down list.  |
| Link             | Text color of all links.   |
| Link Hover       | Text color of all links when a user hovers the mouse over them.  |
| Field Separator  | Color of the lines that separate fields on records.  |
| Bottom Border    | Color of the line bordering the bottom of the portal.  |

**Section Styles**

| Theme Attribute   | Description  |
|-------------------|--|
| Header Background | Background color of all headings, including search, recent items, related lists, solution categories, documents folders, and the selected tab. |


## Section Styles


| Theme Attribute     | Description   |
|---------------------|---|
| Section Header Text | Text color and font on the headers of search, related lists, recent items, solution categories, and document folders.<br><br>Optionally, you can change the font of the text from the drop-down list.   |
| Left Border         | Border to the left of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.<br><br>Optionally, you can change the number in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.  |
| Right Border        | Border to the right of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.<br><br>Optionally, you can change the number in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list. |
| Top Border          | Border above search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.<br><br>Optionally, you can change the number in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.           |
| Bottom Border       | Border underneath search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.<br><br>Optionally, you can change the number in the pixel field to increase or decrease the thickness of the border. Additionally, you can select the style of the line displayed for the border from the drop-down list.      |
| Section Background  | Background color of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.  |

### List Styles


| Theme Attribute  | Description  |
|------------------|--|
| List Header Text | Text color of the field names selected as column headings on list views.<br><br>Optionally, you can change the font of the text from the drop-down list. |
| Header Underline | Color of the lines underneath column headings on related lists and list views.   |
| Separator        | Color of the lines between records on list views.  |
| Row Highlight    | Color of a record when a user hovers the mouse over it on list views.  |

6. Click **Save** to save all changes to the theme values.

 **Tip:** Changes are visible to Customer Portal users when they refresh their browsers. Therefore, we recommend updating your portal color theme at times when users are least likely to visit your Customer Portal.

 **Note:** To customize the header, footer, and logo of your Customer Portal, see [Enable Customer Portal Login and Settings](#).

## Customizing Your Customer Portal Tabs

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

The Salesforce Customer Portal can display the following tabs:

- Answers
- Articles
- Ideas
- Home
- Cases
- Reports
- Solutions
- Web tabs
- Entitlements
- Custom objects
- Service contracts
- Chatter Answers
- Documents from the Documents tab

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To customize Customer Portal tabs:

- Customize Application

- Salesforce CRM Content tabs: Libraries, Content, and Subscriptions


Additionally, the Customer Portal can display the following tabs to [delegated external user administrators](#):

- Accounts
- Contacts

To choose which tabs display to users logged in to a Customer Portal, and to customize the order in which tabs display to portal users:

1. From Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Select the name of the Customer Portal whose tabs you want to customize.
3. Click **Customize Portal Tabs**.
4. To add or remove tabs, select a tab title, and click the **Add** or **Remove** arrow to add or remove the tab to or from the Selected Tabs box. To change the order of the tabs, select a tab title in the Selected Tabs box, and click the **Up** or **Down** arrow.
5. Optionally, from the **Default Landing Tab** drop-down, you can select which tab to display to users when they log into your portal.
6. Click **Save**.

You can further specify which tabs users can access by editing tab settings in users' associated profiles and permission sets.

 **Tip:** You can [create multiple Customer Portals](#) that display different tabs for users with the same profile, as long as they have access to each object displayed on a tab.

To make the following tabs visible in the Customer Portal, use the steps above and change the tab visibility setting to Default On in all Customer Portal profiles.

## Allowing Portal Users to View Web Tabs

To allow portal users to view Web tabs, simply create Web tabs and assign them to Customer Portal profiles.

## Granting Portal Users Access to the Documents Tab

To allow portal users to view a Documents tab, grant Customer Portal users access to the folders on your Salesforce Documents tab that contain the files you want them to view.

## Allowing Portal Users to View the Reports Tab

To allow portal users to view a Reports tab:

1. Grant portal users access to the folders on your Salesforce Reports tab that contain the reports you want them to run.
2. Set the organization-wide default sharing model to Private on objects you want portal users to report on.
3. Assign portal users to permission sets or profiles that include the "Run Reports" permission.

When you add the Reports tab to your Customer Portal, portal users:

- Cannot customize reports or filter report results; they can only run reports.
- Can export reports to Excel if they have the "Export Reports" permission.
- Do not have access to the Unfiled Public Reports and My Personal Custom Reports folders.
- Will receive an insufficient privileges error if they run a report that contains objects they do not have permission to view.

## Providing Portal Users with Access to the Ideas Tab


To allow portal users to access the Ideas tab, configure Ideas to display in the portal. For more information, see [Creating and Editing Zones](#) and [Enabling Ideas in the Customer Portal](#).

If your organization has the Ideas and Answers Portal license, hide the Reports tab in the Customer Portal. Otherwise, your Customer Portal users receive an Insufficient Privileges message when they click the Reports tab. For information on hiding tabs, see [Customizing Your Customer Portal Tabs](#).

## Allowing Portal Users to Access Salesforce CRM Content Tabs

To allow portal users to access Salesforce CRM Content, see [Enabling Salesforce CRM Content in the Customer Portal](#).

## Customize Your Customer Portal Pages

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

You can customize your Salesforce Customer Portal pages just as you customize pages in Salesforce: with page layouts.

Page layouts control the layout and organization of buttons, fields, s-controls, Visualforce, custom links, and related lists on object record pages. They also help determine which fields are visible, read only, and required. Page layouts can include s-controls and Visualforce pages that are rendered within a field section when the page displays. You can control the size of the s-controls and Visualforce pages, and determine whether or not a label and scroll bars display.

Customer Portal users view the layouts assigned to their profile when they log in to your Customer Portal. You can customize the following objects' page layouts for your portal:

- Home
- Tasks
- Events
- Cases
- Assets
- Accounts
- Solutions
- Contacts
- Entitlements
- Custom Objects
- Service Contracts

## Customizing Portal Page Layouts

From the object management settings for the object whose page layout you want to edit, go to Page Layouts.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To modify page layouts:

- Customize Application

To assign page layouts to profiles:

- Manage Profiles and Permission Sets


By default, Customer Portal users have “Read” permissions on accounts, contacts, assets, products and price books, so that they can view their account name and choose a contact and asset for the cases they create on your portal. They may also have “Update” or “Create” permissions for assets and accounts, depending on the type of customer portal.

 **Note:** Customer Portal users can't view the tags section of a page, even if it is included in a page layout.

To display a custom object in your Customer Portal, you must:

- Select the `Available for Customer Portal` checkbox on the custom object. You cannot assign a portal profile to a custom-object page layout unless this checkbox is selected.
- Grant user permissions to the custom object on permission sets or profiles assigned to portal users.
- Add the tab of the custom object to your Customer Portal so that the tab is accessible to your Customer Portal users. For more information, see [Customizing Your Customer Portal Tabs](#).

## Setup Tips and Considerations for Customer Portal Pages

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

Consider the following set up tips and general information about Salesforce Customer Portal pages.

### Setting Up Cases

- When setting up your Customer Portal, clone the page layout for cases (Case Layout), and rename it `Portal Case Layout`. This allows you to easily differentiate between case page layouts for internal users and case page layouts for portal users.
- By default, new cases are accessible in the Customer Portal, but you can include the `Visible in Self-Service` checkbox on case page layouts so that you can deselect the checkbox to prevent a case from being displayed.
- Do not select the `Show Case Email Notification` and `Show Case Email Notification by default` checkboxes on case page layouts. These features only apply to Salesforce users.
- Do not add the `Internal Comments` field to case page layouts assigned to portal profiles because portal users may view comments intended only for Salesforce users.
- Include the `Asset` field on case page layouts if you want portal users to be able to associate cases with an asset related to their account.
- Include the `Contact Name` lookup field on case page layouts so that users with “Edit” permissions on that field can change a case's contact to another portal user in the same account.
- If a portal user is the owner of a case, the `Contact Name` field on the case must be the contact associated with the same portal user who owns the case. You can't specify a different contact, even if they're associated with the same portal account.
- Do not select the `Show solution information section`, `Show Contact Notification checkbox by default` checkboxes on close-case page layouts because their functions only apply to Salesforce users.
- Create case record types to set the default value of the `Case Origin` picklist field for cases logged on your Customer Portal.
- For case assignment rules to work on the Customer Portal, select the `Select Case Assignment checkbox by default` checkbox on case page layouts assigned to portal profiles. Portal users cannot view these checkboxes on the Customer Portal. Note that assignment rules trigger when a case is created *and* when it is edited. To prevent cases from being automatically

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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



reassigned when edited by portal users, add a rule entry using the criteria *Current User: User Type contains Customer Portal* and select the *Do Not Reassign User* checkbox.

- Portal users can view all the values in the *Type*, *Status*, *Priority*, and *Case Reason* picklist fields unless you create record types for cases that contain separate picklist values for them.
- You can prevent portal users from submitting cases with attachments by removing the **Submit & Add Attachment** button from case page layouts:
  1. Edit a case page layout with the enhanced page layout editor.
  2. Click **Layout Properties**.
  3. Deselect **Show Submit & Add Attachment Button**.
  4. Click **OK**.
  5. Click **Save**.

### Cases

- Portal users need the “Read” permission on contacts to create cases.
- Portal users cannot edit the value of the *Status* picklist field on cases.
- Portal users can edit and delete attachments they have added to their cases, but portal users cannot edit and delete attachments added to cases by Salesforce users.
- The **Delete** and **Sharing** buttons on case detail pages are not available to portal users.
- The **Email Message List**, **Next**, and **Previous** links are not available to Customer Portal users when they view emails from the [Email related list](#) on case detail pages. The Email related list is only available in organizations where Email-to-Case or On-Demand Email-to-Case is enabled.
- Optionally, you can create case auto-response rules to automatically respond to portal users when they create a case on your portal.
- Portal users can view, search, and create notes and attachments on cases.
- When creating a case, a portal user bypasses the Suggested Solutions page and is directed to their case if:
  - No relevant suggested solutions match the case.
  - He or she creates the case by clicking **Submit & Add Attachment**.

Note that suggested solutions are only available in organizations where they are enabled. For more information on suggested solutions, see [Suggested Solutions Overview](#). For more information about how Customer Portal users can self-close their own cases from suggested solutions, see [Enable Customer Portal Login and Settings](#).

- If [Salesforce Knowledge](#) is enabled, you can add the Articles related list to case page layouts assigned to portal users so that they can find articles that help them solve their cases.
- If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can't preview, edit, or delete them.

### Solutions

- The *Status* picklist field on solutions is not available to portal users.
- The *Status* picklist field on a solution does not need to be set to Reviewed for a solution to be visible in the Customer Portal; a solution is visible in the Customer Portal if the *Visible in Self-Service Portal* checkbox is selected on a solution.
- If you enable [solution categories](#) for your organization, solution categories are also available in your Customer Portal. Uncategorized solutions do not display in the solution categories of your Customer Portal, but they do display in your portal's search and list views.

- The [top solutions feature](#) is not available for your Customer Portal, but you can create links on your Customer Portal home page to your organization's most relevant solutions.

### Home Page

- Include the Customer Portal Welcome component on home page layouts assigned to Customer Portal users. Each Customer Portal user who logs in to your portal receives a welcome message with his or her name. The users can also change their own portal username, password, locale, language, time zone, and contact information. When portal users change information about themselves their user records are updated but their contact records aren't automatically updated with those changes.

Note that Customer Portal users who have the "Is Single Sign-On Enabled" permission cannot change their usernames from the Customer Portal Welcome component.

- When designing home page layouts for your Customer Portal, we recommend adding the following components: Search, Solution Search, Recent Items, Customer Portal Welcome, and a custom HTML Area component that includes your corporate branding in the wide column.
- Create custom components to put on the home page layouts of your Customer Portal, such as links to custom list views, specific documents, and top solutions.
- Custom component names do not display in the wide section of the home page in the Customer Portal.
- You can position the logout link anywhere on the header by using the HTML tag: "`<a href='/secur/logout.jsp'>Logout</a>`." For more information on the header, see [Enable Customer Portal Login and Settings](#).
- We recommend *not* adding the following components to your Customer Portal home page layouts because they are for Salesforce users: `Tasks`, `Calendar`, `Product Search`, `Recent Items`, `Dashboard Snapshot`, `Messages & Alerts`, and `Items To Approve`.

### Activities

- Portal users can't be assigned to activities.
- Portal users can view completed tasks and past events marked `Visible in Self-Service` that are associated with objects they have permission to view.

### Documents

Verify that none of your organization's internal documents on the Documents tab are available in folders accessible to portal users.


### Reports

- Portal users can run reports if they have the "Run Reports" permission.
- Portal users can export reports if they have the "Export Reports" permission.
- The Report Options section does not display on report results for portal users because portal users cannot customize report results. Also, the Generated Chart section, which includes the **Edit**, **Large**, **Medium**, and **Small** links, does not display on report results.
- Report results for portal users only include links to objects the portal users have permission to access.
- Portal users can only report on objects set to Private in the organization-wide default sharing model. Some objects, such as solutions and articles, are not included in the sharing model and cannot be reported on by Customer Portal users.
- Portal users will receive an insufficient privileges error if they run a report that contains objects they do not have permission to view.
- By default all users, including portal users, can view report folders. To prevent portal users from viewing report folders, update the sharing settings on report folders to the All Internal Users group.

### Custom Objects

- When you deselect the `Available for Customer Portal` checkbox on a custom object, the custom object is no longer available on the Customer Portal, and all of the permissions for the custom object are automatically removed from portal

profiles. If you select the `Available for Customer Portal` checkbox on a custom object again, you must update the permissions for the custom object on portal profiles.

 **Note:** If you configure custom object access at a later time, permission sets retain their configuration.

- Portal users can view, search, and create notes and attachments on custom objects.
- If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can't preview, edit, or delete them.

### Articles

For setup information, see [Enabling Salesforce Knowledge in the Customer Portal](#).

### Assets

- Portal users can create, view, and update assets associated with their accounts.
- Assets are only visible to portal users if you include the `Assets` lookup field on case page layouts. From case detail pages, portal users can view an asset by clicking it in the `Asset` field.
- Portal users can view and search attachments on assets.
- If Chatter is enabled for your organization, feed attachments are included in the Notes and Attachments related list. Portal users can download feed attachments, but can't preview, edit, or delete them.

### Salesforce CRM Content

- Portal users with a Salesforce CRM Content feature license can perform any tasks granted by their library permission.
- Portal users with the "View Content on Portals" user permission have view-only access to Salesforce CRM Content.
- Portal users with the "Create Libraries" user permission can create and administer libraries.

For more information, see [Enabling Salesforce CRM Content in the Customer Portal](#).

### Answers

For setup information, see [Enabling Answers in the Customer Portal](#). When [customizing your portal fonts and colors](#), note that answers only supports the following changes:

- All tab styles
- The following page styles:
  - Page Background
  - Text
  - Link
  - Link Hover

### Ideas

For setup information, see [Enabling Ideas in the Customer Portal](#).

### Accounts


Only users with delegated external user administrator rights can view the Accounts tab and their account's detail page in your Customer Portal. See [Delegating Customer Portal User Administration and Portal Super User](#).

 **Note:** Customer portal users don't see the Notes & Attachments related list on accounts.

### Contacts

Only users with delegated external user administration rights can view their account's contacts. See [Delegating Customer Portal User Administration and Portal Super User](#).

Only users with the “Portal Super User” permission can view the Contacts tab and edit and detail pages for contacts in your Customer Portal. See [Delegating Customer Portal User Administration and Portal Super User](#).

 **Note:** Customer portal users don't see the Notes & Attachments related list on contacts.

### Entitlements

- For set up information, see [Enabling Entitlement Management in the Customer Portal](#).
- Add the “Read” permission on entitlements to custom portal profiles; assign the profiles to portal users who need access to entitlements. See [Configuring User Access to the Customer Portal](#).
- Add the `Entitlement Name` lookup field to case page layouts so that portal users can add entitlements to cases.
- *Don't* add the following entitlement process fields to case page layouts for portal users because portal users shouldn't access information related to your internal support processes: `Entitlement Process Start Time`, `Entitlement Process End Time`, `Stopped`, and `Stopped Since`. See [Case Fields](#).
- Optionally, add the Entitlements tab to your Customer Portal so that portal users can view entitlements associated with their accounts and create cases from entitlements.
- Add the Entitlements related list to account and contact page layouts so that delegated external user administrators can create cases automatically associated with the right entitlements. See [Delegating Customer Portal User Administration and Portal Super User](#).

### Service Contracts

- For set up information, see [Enabling Entitlement Management in the Customer Portal](#).
- Grant the “Read” permission on service contracts to the portal users who need access to service contracts. See [Configuring User Access to the Customer Portal](#).
- Add the Service Contracts tab to your Customer Portal so that portal users can view the details of their service contracts. See [Customizing Your Customer Portal Tabs](#).
- Contract line items don't display in the Customer Portal.

### Flows

- You can include flows in your Customer Portal by embedding them in a Visualforce page.
- Users can run only flows that have an active version. If the flow you embed doesn't have an active version, users see an error message. If the flow you embed includes a Subflow element, the flow that is referenced and called by the Subflow element must have an active version.
- When you make a flow available to site or portal users, point them to the Visualforce page that contains the embedded flow, not the flow itself. Site and portal users aren't allowed to run flows directly.

## Customizing List Views

Customer Portal users can automatically see any list view with visibility settings marked `visible to all users`. We recommend that you create specific list views on all objects accessible to portal users, and then assign portal users to only the list views you want them to view.

To customize list views:

1. To create a new view, select **Create New View** at the top of any list page or in the Views section of any tab home page.  
To edit or delete any view you created, select it from the `view` drop-down list and click **Edit**.
2. Update search criteria, columns, and visibility settings as necessary.
3. Click **Save**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

Available in: **All** Editions

### USER PERMISSIONS

To create custom list views:

- Read on the type of record included in the list AND Create and Customize List Views

To create, edit, or delete public list views:

- Manage Public List Views

## Customizing Search Layouts

The search layouts in your Salesforce organization are the same search layouts used in your Customer Portal. Verify that search layouts on objects accessible to portal users only include fields you want them to view in search results.

To customize search layouts:

1. From the management settings for the appropriate object, go to Search Layouts.
2. Click **Edit** next to the layout you want to customize.  
You can specify a different set of items to display for search results, lookup dialogs, recent records lists on tab home pages, lookup phone dialogs, list views, and search filter fields.
3. For list view layouts, select any standard buttons you want to display. To hide a standard button on the list view, deselect it.
4. Use the arrows to add or remove items from the layout, and to define the order in which the fields should display.

To select more than one item, use CTRL+click or SHIFT+click to select multiple items in a range.

5. Click **Save**.

### EDITIONS

Available in: both Salesforce Classic and Lightning Experience

Available in: **All** Editions

### USER PERMISSIONS

To change search layouts:


- Customize Application

## Setting Case Assignment Rules

Set case assignment rules to automatically assign cases created by portal users to Salesforce users and queues by using the criteria *Current User: User Type contains Customer Portal*.

To set case assignment rules:

1. From Setup, enter *Assignment Rules* in the Quick Find box, then select **Case Assignment Rules**.
2. Choose **New**, and give the rule a name.
3. Specify whether you want this to be the active rule and click **Save**.
4. Select the rule name and click **New** in the Rule Entries section.
5. Enter the criteria "Current User: License Type contains Customer Portal".
6. Specify the user or queue to which the case will be assigned if it matches the criteria.
7. Choose a template to use for the email that is automatically sent to the new owner of the new case.
8. Click **Save**.

 **Note:** For case assignment rules to work on the Customer Portal, select the *Select Case Assignment* checkbox by default checkbox on case page layouts assigned to portal profiles. Portal users cannot view these checkboxes on the Customer Portal. Note that assignment rules trigger when a case is created *and* when it is edited. To prevent cases from being automatically reassigned when edited by portal users, add a rule entry using the criteria *Current User: User Type contains Customer Portal* and select the *Do Not Reassign User* checkbox

## Creating Workflow Rules

Create workflow alerts to automatically respond to portal users when they create a case on your Customer Portal.

To create workflow rules:

1. From Setup, enter *Email Alerts* in the Quick Find box, then select **Email Alerts**.
2. Click **New Alert**.
3. Configure the alert:
  - a. Enter a description for the alert.
  - b. Choose an email template.

If suggested solutions is enabled for your organization, you can include the suggested solutions mail merge field, `{!Case_Suggested_Solutions}`, on your email template. The suggested solutions merge field provides outbound emails with direct links to the subject and description of each solution that may help customers answer their inquiries. For more information, see [Suggested Solutions Overview](#)

### EDITIONS

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

Lead Assignment Rules are available in: **Group, Essentials, Professional, Enterprise, Performance, Unlimited, and Developer** Editions

Case Assignment Rules are available in: **Professional, Enterprise, Performance, Unlimited, and Developer** Editions

### USER PERMISSIONS

To view assignment rules:

- View Setup and Configuration

To create or change assignment rules:

- Customize Application

### EDITIONS

Available in: Lightning Experience and Salesforce Classic


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

### USER PERMISSIONS

To create or change workflow rules and actions:

- Customize Application


- c. Select the type of recipient and choose from the list displayed. Select an entry in the list of Available Recipients and click **Add** to add that entry to the list of Selected Recipients.
  - d. Enter up to five additional email addresses.
4. Click **Save**.
  5. Set the workflow alert into action. For more information, see [Workflow](#) or [Approvals](#).

 **Note:** Optionally, you can create case auto-response rules to automatically respond to portal users when they create a case on your portal.

## Configuring User Access to the Customer Portal

Set up user access to the Customer Portal as described in [Configuring User Access to the Customer Portal](#).

## About High-Volume Portal Users

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

High-volume portal users are limited-access portal users intended for organizations with many thousands to millions of portal users. Unlike other portal users, high-volume portal users don't have roles, which eliminates performance issues associated with role hierarchy calculations. High-volume portal users include both the High-Volume Customer Portal and Authenticated Website license types.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

## Characteristics

High-volume portal users:

- Are contacts enabled to access a Customer Portal.
- Are assigned to the High-Volume Customer Portal or Authenticated Website license.
- Only share the records they own with Salesforce users in the high-volume portal users sharing group.

## Access to Records

High-volume portal users can access records if any of the following conditions are met:

- They have "Update" access on the account they belong to.
- They own the record.
- They can access a record's parent, and the organization-wide sharing setting for that record is Controlled by Parent.
- The organization-wide sharing setting for the object is Public Read Only or Public Read/Write.
- They access the account or contact that they're enabled under via the API (not via the standard account or contact detail page).

Administrators can create sharing sets to grant high-volume portal users additional access to records; see [Granting High-Volume Portal Users Access to Records](#).

## Limitations


- High-volume portal users can't manually share records they own or have access to.
- You can't transfer cases from non-high-volume portal users to high-volume portal users.
- High-volume portal users can't own accounts.
- You can't add case teams to cases owned by high-volume portal users.
- You can't include high-volume portal users in:
  - Personal groups or public groups.
  - Sharing rules.
  - Account teams, opportunity teams, or [case teams](#).
  - Salesforce CRM Content libraries.
  - High-volume portal users can't access standard Account and Contact detail pages. However, you can create a custom solution, using tools like Visualforce or the API, where they can access those records.

These limitations also apply to records owned by high-volume portal users.

- You can't assign high-volume portal users to territories.

## Granting High-Volume Portal Users Access to Records

Grant users access to records based on their profiles using sharing sets.

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

A sharing set grants high-volume portal users access to any record that has a lookup field to an account or contact that matches the user's account or contact.

You can also grant access to records via access mapping in a sharing set. Access mappings support indirect lookups from the user and target record to the account or contact. For example, grant community or portal users access to all cases related to an account that's identified on the users' contact records.

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

The Available Objects list excludes:

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

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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


### USER PERMISSIONS

To grant high-volume portal users access to records:

- Customize Application




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

 **Note:** Objects with **Set Up** in the Action column aren't configured for high-volume portal user access. Until you configure an object, high-volume portal users have limited or no access to its records. For more information on access, see [About High-Volume Portal Users](#).

- Grant access based on an account or contact lookup:

- Select a value in the User dropdown list to determine the account or contact lookup on the user.
- Select a value in the Target Object field to determine the account or contact lookup on the target object.

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


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

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

- Click **Update**, then click **Save**.

Your settings apply to all of your organization's Customer Portals or sites.

## Sharing Records Owned by High-Volume Portal Users to Salesforce Users

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.


Existing orgs using Customer Portal licenses may continue to use their licenses.

High-volume portal users are limited-access portal users intended for organizations with many thousands to millions of portal users. Unlike other portal users, high-volume portal users don't have roles, which eliminates performance issues associated with role hierarchy calculations. Because high-volume portal users are not in the role hierarchy while Salesforce users are, a *share group* allows you to specify the Salesforce users who can access records owned by high-volume portal users. Each Customer Portal has its own share group.

To specify the Salesforce users who can access records owned by high-volume portal users:

- From Setup, enter *Customer Portal Settings* in the Quick Find box, then select **Customer Portal Settings**.
- Click the name of a Customer Portal.
- Click the Share Group Settings subtab.
- Click **Activate** to turn on the share group.

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

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

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To share records owned by high-volume portal users to Salesforce users:

- Customize Application

5. Click **Edit** to add Salesforce users to the share group:
  - a. From the Search dropdown, select the type of member to add.
  - b. If you don't see the member you want to add, enter keywords in the search box and click **Find**.
  - c. Select members from the Available Members box, and click **Add** to add them to the group.
  - d. Click **Save**.

## Enabling Your Customer Portal for User Login

Enable your Customer Portal for user access.

To “turn on” your portal for users:

1. From Setup, enter *Customer Portal* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Select the name of your Customer Portal.
3. Click **Edit**.
4. Select the **Login Enabled** checkbox.
5. Click **Save**.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To enable login and settings for the Customer Portal:

- [Customize Application](#)

## Adding the Customer Portal URL to Your Organization’s Website

Allow your customers to easily navigate to your Customer Portal by adding a link on your organization’s website to the portal’s URL.

To add the URL of your Customer Portal to your website:

1. From Setup, enter *Customer Portal* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Click the name of your Customer Portal.
3. Copy the URL in the **Login URL** field.
4. Paste the URL into the HTML of your organization’s website.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To enable login and settings for the Customer Portal:

- [Customize Application](#)

# SETTING UP CUSTOMER PORTAL USERS

You set up your customers to use your Salesforce Customer Portal similarly to how you set up Salesforce users. To get started setting up portal users, review these basics:

## About Customer Portal User Management

Discover the various ways you can manage portal users.

## Configuring User Access to the Customer Portal

Set up your organization for portal users.

## Enable the Customer Portal for Contacts and Person Accounts

Grant contacts and person account access to your portal.

## Delegating Customer Portal User Administration and Portal Super User

Delegate a subset of administrative rights to Customer Portal users so that they can manage users associated with their account.

## Enabling Salesforce CRM Content in the Customer Portal

Optionally, enable Salesforce CRM Content for your portal users.

## About Customer Portal User Management


### USER PERMISSIONS

|   |   |
|---|---|
| To manage Customer Portal users:          | Edit Self-Service Users   |
| To manage profiles and permission sets:   | Manage Profiles and Permission Sets                                 |
| To create, edit, and delete page layouts: | Customize Application   |
| To set field-level security:              | Manage Profiles and Permission Sets<br>AND<br>Customize Application |
| To set sharing rules:                     | Manage Sharing  |

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

Managing Customer Portal users is similar to managing regular Salesforce users. General user administration concepts like profiles and page layouts still apply. Review the following advice for managing Customer Portal users:

- [Customer Portal Profiles](#)
- [Customer Portal Sharing Rules](#)
- [Customer Portal Role Hierarchy](#)
- [Customer Portal User Licenses](#)

 **Note:** High-volume portal users include both the High Volume Customer Portal and Authenticated Website license types.

## Customer Portal Profiles


The profiles you assign to Customer Portal users define permissions for them to perform different functions within a Customer Portal, such as whether they can view, create, edit, or delete cases and custom object records.

When you enable a Customer Portal, the following profiles are automatically created if you purchased [user licenses](#) for them:

- High Volume Customer Portal
- Authenticated Website
- Customer Portal User
- Customer Portal Manager

The settings on Customer Portal profiles are similar. However, you can grant users with the Customer Portal Manager profile greater access to data via the Customer Portal role hierarchy and sharing rules (neither of which apply to [high-volume portal users](#)). You can also clone and customize each profile to suit the various support requirements of specific customers. You can also use permission sets to grant additional permissions and access settings to Customer Portal users.

Depending on the user licenses you purchased, you can configure Customer Portal profiles for custom objects, [Salesforce CRM Content](#), reporting, and customer support functionality, such as cases and solutions.

 **Important:** For portal users to be able to view their new cases, the **New Cases Visible in Portal** support setting must be selected. From Setup, enter *Support Settings* in the **Quick Find** box, select **Support Settings**, then select **New Cases Visible in Portal**.

## Customer Portal Sharing Rules

After you enable a Customer Portal, the following groups and sharing rule category are created:

| Groups and Sharing Rule Category                      | Description   |
|---|---|
| All Customer Portal Users group                       | Contains all Customer Portal users, except for high-volume portal users.  |
| All Internal Users group                              | Contains all Salesforce users in your organization.   |
| Roles and Internal Subordinates sharing rule category | <p>Lets you create sharing rules with specific Salesforce users in your organization by role plus all of the users in roles below that role, excluding any Customer Portal and partner portal roles.</p> <p>Because high-volume portal users don't have roles, they aren't included in this or any other sharing rule category.</p> |

You can use these groups and the sharing rule category to create sharing rules that:


- Grant Customer Portal or Salesforce users access to specific data (except for high-volume portal users, because you can't include them in any groups or sharing rules)
- Link Customer Portal users and Salesforce users
- Link Customer Portal users from different accounts as long as they have the Customer Portal Manager user license

## Customer Portal Role Hierarchy

When you enable a Customer Portal on an account, the system creates a role hierarchy for the account's portal users. The portal roles are unique for each account and include the account's name—or example, "Account A Customer User." In your organization's overall role hierarchy, this account-specific hierarchy is directly below the account owner.

The roles in a portal role hierarchy are fixed. You cannot customize them or add new ones. They are:

- Executive—for contacts
- Manager—for contacts
- User—for contacts
- Person Account—for person accounts

 **Note:** All users in a customer portal role (Executive, Manager, and User roles) have read access to all portal-enabled contacts under their portal account even when the contact sharing model is private.

As you enable customers as Customer Portal users, the system automatically assigns roles based on the [user license](#). Person accounts always have the Person Account role. Contacts with the High Volume Customer Portal or Authenticated Website license do not have a role.

If access to contacts are set to private, high-volume portal users only have access to their own contact and those they are granted access to.

Role hierarchies ensure that portal users from different accounts never see each other's data. Even though high-volume portal users aren't included in role hierarchies, they're restricted from seeing records that aren't associated with their account or contact, and they can only see objects to which they've been [granted access](#). You can, however, create sharing rules so that users with the Customer Portal Manager license from different accounts can see each other's data.

Accounts with different portal types—Customer Portal *and* partner portal—have a separate role hierarchy for each portal. Role names include the portal type with which they are associated. For example, if Account A has both a Customer Portal and a partner portal, then roles for the Customer Portal are named "Account A Customer User" and roles for the partner portal are named "Account A Partner User."

To view the roles assigned to your Customer Portal users, create a custom report, choose Administrative Reports, select Users as the data type, and add `Role` to your report columns. Note that you can't report on roles for high-volume portal users because they don't have roles.

 **Note:** You cannot create a Customer Portal user associated with an account owned by a partner user.

## Customer Portal User Licenses

A user license determines the baseline of features that the user can access. Every user must have exactly one user license.

You can assign the following user licenses to Customer Portal users:


- High Volume Customer Portal
- Authenticated Website
- Customer Portal Manager Custom
- Customer Portal Manager Standard (not available for new customers)


These user licenses determine the available Customer Portal profiles. They also determine users' positions in the Customer Portal role hierarchy.

The following table shows the Customer Portal user licenses with their associated profiles and positions in the Customer Portal role hierarchy.

| User License   | Profiles   | Roles and Sharing  |
|--|--|--|
| <p>High Volume Customer Portal and Authenticated Website</p> <p>Both user licenses are high-volume portal users</p> <p>(Available to purchase)</p> | <p>High Volume Customer Portal or Authenticated Website profile, or a profile cloned and customized from one of these.</p> | <p>High-volume portal users don't have roles. See <a href="#">About High-Volume Portal Users</a>.</p> <p>Can't share but can transfer records they own.</p> <p>Can't transfer cases from non-high-volume portal users to them.</p> <p>Can't include in:</p> <ul style="list-style-type: none"> <li>• Personal groups or public groups.</li> <li>• Sharing rules.</li> <li>• Account teams, opportunity teams, or <a href="#">case teams</a>.</li> <li>• Salesforce CRM Content libraries.</li> <li>• High-volume portal users can't access standard Account and Contact detail pages. However, you can create a custom solution, using tools like Visualforce or the API, where they can access those records.</li> </ul> <p>Can access custom objects depending on profile settings.</p>  |
| <p>Customer Portal Manager Custom</p> <p>(Available to purchase)</p>   | <p>Customer Portal Manager profile or a profile cloned and customized from the Customer Portal Manager profile.</p>        | <p>Can assign to either the Executive, Manager, or User role.</p> <p>Can view and edit data they directly own or data owned by or shared with users below them in the Customer Portal role hierarchy; and they can view and edit cases where they are listed in the <code>Contact Name</code> field.</p> <p>Can have data shared to them just like other Salesforce users.</p> <ul style="list-style-type: none"> <li>• Can access custom objects depending on profile settings.</li> <li>• Can access reports depending on profile settings.</li> <li>• Can access Salesforce CRM Content depending on feature license and profile settings. See <a href="#">Enabling Salesforce CRM Content in the Customer Portal</a>.</li> <li>• Can receive the "Portal Super User" and "Delegated External User Administrator" permissions.</li> </ul> |
| <p>Customer Portal Manager Standard</p>  | <p>Customer Portal User profile or a profile cloned and customized from the Customer Portal User profile.</p>              | <p>Can only assign to either the Executive, Manager, or User role.</p> <p>Can view and edit data they directly own or data owned by or shared with users below them in the Customer Portal role hierarchy; and they can view and edit cases where they are listed in the <code>Contact Name</code> field.</p> <p>Can have data shared to them just like other Salesforce users.</p> <ul style="list-style-type: none"> <li>• Can access custom objects depending on profile settings.</li> <li>• Can receive the "Portal Super User" permission.</li> <li>• Can access Salesforce CRM Content depending on feature license and profile settings. See <a href="#">Enabling Salesforce CRM Content in the Customer Portal</a>.</li> </ul>  |

**User License****Profiles****Roles and Sharing**

 **Note:** This license is not available for new customers.

 **Note:** Person accounts enabled as Customer Portal users are automatically assigned the Person Account role, which you cannot change. Person accounts are automatically assigned to this role because they include a single user, so multiple roles are not necessary for their account. Furthermore, all person accounts owned by the same user are assigned the same role.

## Configuring User Access to the Customer Portal


**USER PERMISSIONS**

|  |                                     |
|--|-------------------------------------|
| To set up the Customer Portal:                   | Customize Application               |
| To manage Customer Portal users:                 | Edit Self-Service Users             |
| To create, edit, and delete profiles:            | Manage Profiles and Permission Sets |
| To set default sharing access and sharing rules: | Manage Sharing                      |
| To enable Customer Portal users:                 | Edit Self-Service Users             |

**EDITIONS**

Available in: Salesforce Classic ([not available in all orgs](#))


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


 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.  
Existing orgs using Customer Portal licenses may continue to use their licenses.

When setting up a Salesforce Customer Portal for the first time, configure the following before enabling users to access your portal:

1. Set up your portal as described in [Setting Up Your Customer Portal](#).
2. Assign Customer Portal profiles to a portal:
  - a. Select the name of a portal from the Customer Portal Setup page.
  - b. Click **Edit Profiles** in the Assigned Profiles section.
  - c. Select the `Active` checkbox next to the profile you want to assign to the portal.

Portal users can only log into Customer Portals assigned to their profile. If you are [creating multiple portals](#), you must assign profiles to each portal you want users to access.
3. Set the organization-wide defaults in your organization's sharing model to Private on accounts, contacts, contracts, assets, and cases. This ensures that portal users can only view and edit data related to their accounts.
 

 **Tip:** To maintain Public organization-wide default behavior for Salesforce users, while ensuring that portal users can only view and edit data related to their accounts, you can create self-referencing sharing rules of "All Internal Users" to "All Internal Users".
4. Optionally, set sharing rules for portal users (except for high-volume portal users). This lets you share records between portal users and Salesforce users or vice versa.

 **Note:** If your organization uses sharing rules that share to Roles, Internal and Portal Subordinates, then update those sharing rules to share to Roles and Internal Subordinates instead. This is to help ensure that no records owned by a Salesforce user are accidentally shared with a portal user.

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

You can easily convert sharing rules that include Roles, Internal and Portal Subordinates to include Roles and Internal Subordinates instead by using the Convert Portal User Access wizard. Furthermore, you can use this wizard to convert any publicly accessible report, dashboard, and document folders to folders that are accessible by all users except for portal users.

5. Verify that portal users are not added to any queues and are not included in any public groups added to queues. This is because portal users added to queues may be able to access records from accounts to which they are not related.

6. Optionally, add the Welcome component to home page layouts assigned to portal users.

The Welcome component allows portal users to receive a welcome message with their name, plus the ability to change their own portal username, password, locale, language, time zone, and contact information. For details, see [Setup Tips and Considerations for Customer Portal Pages](#).

7. Optionally, allow contacts to register themselves for access to your portal. See [Enable Customer Portal Login and Settings](#).



## Enable the Customer Portal for Contacts and Person Accounts

To allow a customer to access your Salesforce customer portal, enable the customer's contact or person account record as a customer user.

1. From a contact or person account detail page, click **Manage External User**, and then select **Enable Customer User**.
2. Verify the general information and locale settings, and enter any missing information. The customer's `Username` defaults to the customer's `Email`.
3. Select a portal user license. The user license that you choose determines the permission sets, user profile, and role hierarchy options that you can select for the customer user. See [Customer Portal User Licenses](#).
4. Select `Generate new password and notify user immediately` to email a customer portal username and password to the customer.  
If your Salesforce org uses multiple customer portals, customer users can access all customer portals that are assigned to their profiles with a single username and password. See [Creating Multiple Customer Portals](#).
5. Click **Save**.
6. To troubleshoot or confirm the portal configuration, on the contact detail page, click **Manage External User**, and then choose **Log in to Portal as User**. A new browser window opens and logs you in to the portal as the partner user.

You can deactivate customer users as needed.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To enable customer users or to log in as a portal user:


- Edit on the account that's associated with the customer user

AND


Edit Self-Service Users

OR

Manage External Users

-  **Important:** When creating customer users, the account that the new contact is associated with must have an account owner that is assigned a role.


## Delegating Customer Portal User Administration and Portal Super User

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

You can delegate some administrative rights to Customer Portal users with the Customer Portal Manager Custom user license. Delegated external user administrators can do the following for external users, including both customer users and partner users, associated with their own account:

- Create new external users
- Edit existing external users
- Reset passwords for external users
- Deactivate existing external users

 **Note:** When a delegated external user admin deactivates a portal user, the admin doesn't have the option to remove the portal user from teams that user is a member of.


Delegated external user administrators can also view their account's detail page, along with contacts and cases related to their account via the Accounts tab. In addition, delegated external user administrators receive the "Portal Super User" permission. This permission lets delegated external user administrators do the following for their own account:

- View, edit, and transfer all cases
- Create cases for contacts
- View and edit all contacts, whether portal enabled or not
- View account details when they're the contact on a case
- Report on all contacts, whether portal enabled or not, if the Reports tab is added to your Customer Portal and the user has the "Run Reports" permission

You can add just the "Portal Super User" permission to the profiles of external users (except for high-volume portal users) so that they have access to their account and can view and edit all of its cases and contacts without having the ability to manage other external users. However, super users can't view the Contacts tab on the Customer Portal without the Delegated External User Administrator permission. To edit contacts, super users must select a contact from a case record. For more information, see:

- [Delegating External User Administration Rights](#)
- [Providing Users with the "Portal Super User" Permission](#)
- [Tips on Setting Up Delegated Customer Portal User Administration](#)

## Delegating External User Administration Rights

 **Note:** You must use the original profile user interface to delegate administration rights for external users. If you're using the enhanced profile user interface, disable it temporarily in the User Interface settings to complete this procedure.

To delegate External User Administration Rights:

1. From Setup, enter *Profiles* in the Quick Find box, then select **Profiles** and click a custom Customer Portal profile.  
You can't add delegation rights or the "Portal Super User" permission to the standard Customer Portal Manager, Customer Portal User, or High Volume Customer Portal profiles.

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

### USER PERMISSIONS

To manage Customer Portal users:

- Delegated External User Administrator

To create, edit, and delete profiles:

- Manage Profiles and Permission Sets

To view and edit all cases and contacts for an account:

- Portal Super User

2. Click **Edit**.
3. Select **Delegated External User Administrator**.  
When you select **Delegated External User Administrator**, the **Portal Super User** is automatically selected after you click **Save**.
4. Click **Save**.
5. In the Delegated External Users Profiles related list, click **Edit**.
6. Select the external user profiles you want users with this profile to be able to administer. An external user delegated administrator can manage external users with Customer Portal, partner portal, or Communities profiles, as long as the users with the profile are under the same account.
7. Click **Save**.

To change which profiles a delegated Customer Portal user administrator can edit:

1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles** and click a custom Customer Portal profile.
2. Click **Edit** in the Delegated External User Profiles related list.
3. Select the external user profiles you want this profile to be able to administer.
4. Click **Save**.

Delegated Customer Portal administrators can perform the following tasks from a contact's detail page:

- Click **Enable Customer Portal User** to allow a contact to use a Customer Portal.
- Click **View Customer Portal User** to view the Customer Portal user's details. From a Customer Portal user's detail page, delegated Customer Portal users can:
  - Click **Edit** to edit a Customer Portal user's details.
  - Click **Reset Password** to reset the Customer Portal user's password.
  - Click **Edit** and deselect the **Active** checkbox to deactivate the user.

## Providing Users with the “Portal Super User” Permission

To provide users with the “Portal Super User” permission:


1. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles** and click a custom Customer Portal profile.  
You can't add the “Portal Super User” permission to the standard Customer Portal Manager, Customer Portal User, or High Volume Customer Portal profiles.
2. Click **Edit**.
3. Select **Portal Super User**.
4. Click **Save**.

 **Tip:** To report on profiles with the “Portal Super User” permission:

1. Note the names of profiles with the “Portal Super User” permission.
2. Select the Reports tab.
3. From the Administrative Reports folder, select the All Active Users report.

## Tips on Setting Up Delegated Customer Portal User Administration

Consider the following when setting up delegated Customer Portal User Administration:

- On the profile of users you are granting delegated portal administration:
    - Add the “Create” and “Edit” permissions on contacts so that delegated portal administrators and users with the “Portal Super User” permission can create and update contacts related to their account.
    - Set the Accounts and Contacts tab settings to Default On so that delegated portal administrators can view the Accounts and Contacts tabs and easily manage contacts related to their accounts.
  - Add the Accounts and Contacts tabs to your Customer Portal.
  - Set field-level security and page layouts so that delegated Customer Portal user administrators and portal super users can only access the account, contact, and case fields you specify.
-  **Note:** To allow portal super users to create cases for contacts other than themselves, set the field-level security on the `Contact Name` field on cases to Editable.
- Customer Portal users are prevented from viewing related lists to objects they don’t have access to. For example, if a Customer Portal user views a contact, and the contact page layout includes the Opportunities related list, the portal user can’t view the Opportunities related list because portal users don’t have access to opportunities.
  - Delegated Customer Portal user administrators can update portal users on any account to which they are transferred.

## Enabling Salesforce CRM Content in the Customer Portal


### USER PERMISSIONS

|   |   |
|---|---|
| To set up and update the Customer Portal:             | Customize Application   |
| To create and edit profiles:                          | Manage Profiles and Permission Sets   |
| To manage Customer Portal users:                      | Edit Self-Service Users   |
| To create Salesforce CRM Content library permissions: | Manage Salesforce CRM Content OR<br>Manage Content Permissions                                      |
| To add users to a Salesforce CRM Content library:     | Manage Salesforce CRM Content<br>OR<br>Manage Library checked in your library permission definition |

### EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

-  **Note:** Starting with Summer '13, the Customer Portal user license isn’t available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.
- Existing orgs using Customer Portal licenses may continue to use their licenses.

Salesforce CRM Content is available in the Customer Portal. Two levels of access to Salesforce CRM Content can be granted to Customer Portal users:

- Portal users without a Salesforce CRM Content feature license can download, rate, comment on, and subscribe to content if they have the “View Content on Portals” user permission. They cannot view potentially sensitive data such as usernames, download history, and version history. The content delivery feature is not available to portal users.
- Portal users with a Salesforce CRM Content feature license can access all Salesforce CRM Content features granted by their library permission(s), including contributing content, moving and sharing content among libraries, and deleting content. They can also view Salesforce CRM Content reports. The content delivery feature is not available to portal users.

## Enabling Salesforce CRM Content for Non-Licensed Users

After you have enabled your Customer Portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have not purchased Salesforce CRM Content feature licenses for your portal users.

1. Update Customer Portal profiles:
  - a. Clone the Customer Portal User or Customer Portal Manager profile.
  - b. In the cloned profiles, add the “View Content in Portals” user permission.
  - c. Change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.
  - d. Assign the cloned profiles to your Customer Portal users.
2. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.



**Note:** A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.

3. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.
4. Add portal users to libraries. Portal users with the Customer Portal User profile or a clone of that profile can only be added to a library as part of a public group. Portal users with the Customer Portal Manager profile or a clone of that profile can be added to a library individually.
5. Add the Salesforce CRM Content tabs to each Customer Portal.




**Note:** The Documents tab is not part of Salesforce CRM Content.

## Enabling Salesforce CRM Content for Licensed Users


After you have enabled your Customer Portal, complete the following steps to enable Salesforce CRM Content in your portals. Use these steps if you have purchased Salesforce CRM Content feature licenses for your portal users

1. Update Customer Portal profiles:
  - a. Optionally, clone the Customer Portal User and Customer Portal Manager profile to include the “Create Libraries” user permission if you want to allow portal users to create and administer new libraries.
  - b. In your standard or cloned Customer Portal profiles, change the tab visibility for the Libraries, Content, and Subscriptions tabs from Tab Hidden to Default On.
  - c. Assign the cloned profiles to your Customer Portal users as needed.
2. Select the `Salesforce CRM Content User` checkbox on the user detail page for each Customer Portal user.


3. Determine what privileges your portal users will have in each Salesforce CRM Content library by creating one or more library permissions.

 **Note:** A library permission can only grant privileges that a user's feature license or profile permits. For example, even though `Tag Content` is a library permission option, selecting it does not allow portal users without a Salesforce CRM Content feature license to tag content.

4. Determine which libraries you want your portal users to have access to. Ensure that confidential content is not available in these libraries.
5. Add portal users to libraries. Portal users with the Customer Portal User profile or a clone of that profile can only be added to a library as part of a public group. Portal users with the Customer Portal Manager profile or a clone of that profile can be added to a library individually.
6. Add the Salesforce CRM Content tabs to each Customer Portal.

 **Note:** The Documents tab is not part of Salesforce CRM Content.

# CUSTOMER PORTAL REPORTING

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

Organizations that have a Customer Portal can gather data about portal use. Customer Portal reporting features include:

## **Customer Portal User Reports**

You can report on Customer Portal users by creating a custom report, choosing Administrative Reports, selecting Users as the data type, and adding `License Type`, `Profile`, and `Role` to your report columns. You can also add the `Customer Portal Account` field to your account reports to view which accounts have contacts enabled to use the portal.

## **Helpful Solutions Report**

The Helpful Solutions report displays statistics from Customer Portal that display solutions. On each solution page, customers can indicate whether that solution is helpful. You can use this report when choosing which solutions to include as links on your Customer Portal Home page.

## **Closed by Self-Service User field for Support Reports**


In any support report, an organization that has enabled both the Customer Portal and suggested solutions can use the `Closed by Self-Service User` field to report on how many cases have been closed by users on the Customer Portal.

Note that when a portal user clicks **Yes** on a suggested solution, the solution is attached to the case and the case is not closed.

## **Case History and Solution History Reports**

The Case History and Solution History reports show the history of changes to standard and custom fields where field history tracking is enabled.

# CREATING MULTIPLE CUSTOMER PORTALS

 **Note:** Starting with Summer '13, the Customer Portal user license isn't available for new orgs. You can create a customer portal using the Customer Account Portal Lightning template in Experience Builder.

Existing orgs using Customer Portal licenses may continue to use their licenses.

After you have [enabled the Salesforce Customer Portal](#), you can create multiple Customer Portals to satisfy the various business needs of your customers.

To create more than one Customer Portal:

1. From Setup, enter *Customer Portal Settings* in the **Quick Find** box, then select **Customer Portal Settings**.
2. Click **New**.
3. Follow the same steps used to set up your organization's first Customer Portal. See [Setting Up Your Customer Portal](#).

 **Note:** Contact Salesforce for information about the number of Customer Portals you can activate for your organization.

## EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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

## USER PERMISSIONS

To create multiple Customer Portals:

- [Customize Application](#)

## Implementation Tips

- Portal users can only log into Customer Portals assigned to their profile. To assign a profile to a Customer Portal, select the name of a portal from the Customer Portal Setup page, click **Edit Profiles** in the Assigned Profiles section, and select the **Active** checkbox next to the profile you want to assign to the portal.

A portal user can access all the Customer Portals assigned to his or her profile with one username and password.

You can view the number of active users associated with each profile assigned to a Customer Portal by creating a custom summary report and adding **Profile** to your report columns.


- The login URL of each Customer Portal you create contains a unique identifier, such as portalId=060D00000000Q1F. The unique identifier determines the specific portal a user can access. If a user accesses a login URL that does not contain a unique identifier, they are automatically directed to the login URL of the first Customer Portal you created. Note that portal users can only log into a Customer Portal via the portal's login page and not through the Salesforce login page.
- The settings on the following items apply to both your organization *and* your Customer Portals:
  - List views
  - Search layouts
  - Case assignment rules
  - Workflow alerts



## Best Practices


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- Because you can uniquely customize the fonts, colors, email templates, and login message of each Customer Portal you create, you can build a Customer Portal for each product and customer service level supported by your organization. For example, if your organization provides gold, silver, and bronze levels of customer support, then you could create a unique Customer Portal for each.

 **Note:** JavaScript and CSS code are automatically removed from HTML files used as the portal login message.

- You can standardize the communication templates sent to the users of all your Customer Portals by clicking the **Set Default Email Templates for All Customer Portals** link on the Tools section of the Customer Portal Setup page. These settings determine the email templates to use when sending email notifications, such as a new case comment or a reset password, to portal users whose profiles are associated with more than one Customer Portal.

By default, sample templates are automatically selected for you in the `New User Template`, `New Password Template`, and `Lost Password Template` lookup fields. However, sample templates are not selected for you in the `New Comment Template` and `Change Owner to Portal User Template` lookup fields. Unless you select templates for these fields, users whose profiles are associated with more than one Customer Portal will not receive email notifications when new comments are added to their cases or when they become the new owner of a record in the Customer Portal. Email templates must be marked as `Available for Use` to be sent to portal users.

 **Tip:** Because the default email templates are sent to users of multiple Customer Portals, we recommend that you create default email templates that do not contain portal-specific branding.

- You cannot delete a Customer Portal, but you can prevent users from logging into a portal by deselecting the `Login Enabled` checkbox. For more information, see [Enable Customer Portal Login and Settings](#).
- You can create multiple Customer Portals that display different tabs for users with the same profile, as long as the profile has access to each object displayed on a tab. For more information, see [Customizing Your Customer Portal Tabs](#).

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