The changing face of online collaboration with Salesforce Communities

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01Introduction

"Salesforce Communities offer online platforms for collaboration. Enterprises may set up fully-branded and customized communities for their customers, employees, suppliers, partners, distributors or any other stakeholder to connect and collaborate. The enterprise that creates the community may customize each created community with a subset data, process, content, and other features available in the internal Salesforce portal of organization, depending on the business needs"

The created communities may be accessed from the drop-down menu in the top left corner of Salesforce or Salesforce1 Mobile Browser App.

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Why communities

Communities are branded spaces for members to connect. Enterprises use communities to bring together different stakeholders, who are spread across many places, to a single location, where they may collaborate effectively to improve sales, deliver better service to customers, boost efficiency and productivity, or anything else.

The users of the community, as decided by the enterprise that creates the community, could collaborate by engaging in discussions, sharing information, providing status updates, or any other action, to further the objective for which the community is set up.

It is possible for organizations to create as many communities as required. Organizations may create multiple communities within the organization for different purposes, and assign stakeholders membership to one or more community as desired. For example, a customer support community could be set up to reduce support costs, a channel sales community could be established for partner deal support, and so on. It is even possible to create a private Chatter Community for the best customers to interact with product managers, for private feedback or special attention. A community may also be set up for a special event, to be disbanded after the event is over. Each community would contain the subset of features and data available in the internal Salesforce, as decided by the enterprise.

03 Enabling Chatter Communities and other Add-Ons

After having set up the basic community, it is possible to enrich the community with additional integrations, such as Chatter Answers, Chatter Questions, Ideas and Salesforce Knowledge, all of which would expand the reach of the community, allow members to collaborate more deeply and optimize the network between internal community members and customers.

A key requirement in just about any community is Chatter. Salesforce Chatter is the enterprise collaboration cloud, offering real members the opportunity to collaborate in real-time. Setting up Chatter in Salesforce Communities is relatively easy and straightforward.

Chatter Answers is a self-service support community where users may post questions and other members or service agents assigned for the task may comment on them or answer the questions.

> Trace the following path from SetUp to enable Chatter answers: Customize> Chatter Answers> Settings> "Enable Chatter Answers." It is important that community members have access to the objects "Questions," "Knowledge Articles," and "Data Categories" for them to leverage Chatter Answers though.

Chatter Questions offer community members the ability to ask and answer questions in their Chatter feed, taking community engagement to a deeper level. It is possible to add files to questions, for communities built using the Napili template.

> deas allow members to post an idea, and other members to vote for, and comment on the same. This is an ideal way to discuss ideas in a transparent way. To add-on ideas to the community, go to SetUp, and click Customize>Ideas>Settings.

Salesforce Knowledge offers a repository or base where users may create and manage articles easily. If the organization has Salesforce Knowledge license, it is possible to enable the same for the Community, and view the articles posted in Knowledge within the Community.

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Migrating from Salesforce Portal to Communities

Any Salesforce Community is a subset of the enterprise Salesforce. After having set up a community, many enterprises seek to migrate other resources relevant to the community from the main portal specific Community.

The reasons for opting to migrate are many:

1. Portals serve and receive content, but lack a true sense of community for members to connect and engage. On the other hand, Communities make it easy to streamline the required processes to the chosen internal and external users. It also becomes easy to engage with external users on any record.

2. Communities make it possible to manage web content more easily. Communities provide access to Site.com, a web-based CMS (content management system) that facilitates quick creation of web pages for the Community. This greatly cuts down on the time, resources and hassles that it otherwise entails to create and update web content using VisualForce.

3. Communities offer all the functionalities available in partner portals and Customer Portals, and in addition, many add-on features. Communities, for instance, make it possible to use Site.com to create branded public and private pages.

An important point to note is that Community settings are independent of the portal settings and the changes made to it have no impact on the existing portal setup. It is possible to continue using the legal Customer or Partner Portal even after setting up the Community.

The actual migration process from the Partner or Customer Portal to the Community requires performing a typical community setup. Make sure the paths are with the correct URL for the community, when using Visualforce or Apex for the purpose.

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Customizing Salesforce Community User Interface

There are two ways to add new pages or customize existing pages in the Community:

1. Using Community Builder (previously Site.com)
2. Through Force.com Sites

Both options allow the developer to create branded, publicly available pages such as landing or marketing pages, and also private custom pages that only community members can access.

Community Builder

Community Builder (Site.com) offers preconfigured self-service templates for developers to apply branding, edit pages, or update the template, before publishing the changes, all from one user-friendly interface.

There are three self-service templates—Koa, Kokua, and Napili, which make the task of creating a responsive self-service community easy.

Koa
is a text-based, responsive self-service template that allows users to search and view articles. This template supports Knowledge and Cases.

Napili
allows users to post questions to the community, search for and view articles, and contact support agents by creating cases. This template supports Knowledge, Cases, and Questions & Answers.

These templates enable to create configurable App Launcher, design branded public pages, add data driven private pages, use ready-made forms, and more. The templates offer reusable page elements that make it possible to build and iterates quickly.

Less technically endowed users may use the Site.com Studio instead of the templates. Site.com Studio is a web content management system (CMS) within the Community builder. It offers developers a drag-and-drop environment to customize the community's pages. It is easy and quick to build dynamic, data-driven web pages and edit the content in real time. The process does not require using code, though the option to add custom code is there, if required.

Force.com

Each community has one associated Force.com site that enables advanced customizations to the community.

Customizing the Community using Force.com sites is best suited for developers with experience using Visualforce. Force.com sites allows the developer to leverage Force.com capabilities such as programmable logic, analytics, workflow and approvals when building custom pages and applications. Developers can write their own controllers or extensions to controllers using Apex code, and create custom login or self-registration pages. This is hard work; but the best way to build dynamic web applications, such as an event management application, or customize out-of-the-box error pages (such as Authorization Required (401)" and "Page Not Found (404)"pages) to reflect the branding of the community.

Force.com online helps offer extensive set of resources that aids the developer to carry out the required customizations.

Community Engagement

Creating and customizing the community is only half the work done. For the success of the community, it is important to take active engagement steps.

The first task is to activate the community and make it visible to the members. Sending out a welcome mail, complete with access credentials is a good first step.

The customization, especially the branding theme, will invariably influence the level of engagement. It is important to manage the community actively, especially to update important settings such as flagging content, nickname display, and public access to Chatter, and more. The onus is on the community manager to monitor the level of engagement, encourage member participation on a daily basis, keeping conversations going, and recognize members for contributing. Setting up a reputation level, based on member engagement, is a good way to keep track of member participation.

Community offers a host of reports and a dashboard that makes explicit trends in activity and membership. It is possible to create custom reports from the dashboards to get insights into the health of the community and engagement levels.

08 Communities User Licenses

1. The Customer Community license is similar to a High Volume Customer Portal license. This license works best for business-to-consumer communities with large numbers of external users.

2. The Customer Community Plus license is similar to a Customer Portal Enterprise Administration license, and is best suited for business-to-consumer communities where users require unlimited logins to manage customer support.

3. The Partner Community license is similar to a Gold Partner license and is best-suited for business-to-business communities, such as a partner community.

Communities also support all internal and portal licenses including existing customer portal, authenticated website, and partner portal licenses. Communities, however, do not support the Chatter External license.

Users in the organization with portal licenses will be able to access all communities associated with the organization, as long as the specific user is included in the community. The method to include existing users to a community is by adding profiles or by using permission sets within the community. It is not necessary to purchase new Communities licenses for these users.

Salesforce Communities users with the "Create and Set up Communities" permission have full site administrator access to the community's Site.com website. To allow Communities users without such permission to edit the site, it becomes necessary to purchase and assign either a Site.com Publisher or a Site.com contributor feature license, and assign a user role at the site level.

Communities is Salesforce's revolutionary next generation portal that delivers with the combined power of the Force.com platform, Chatter collaboration, and Site.com branding. Used the right way, businesses can leverage a whole world of new advantages through Communities.

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About Suyati

Suyati provides marketing technology and integration services for companies that wish to
of breed solutions and create a unified approach to customer acquisition. This unified
approach requires system integration between various CMS and CRM platforms, and a sl
Marketing Automation, Social Media Listening, email and social marketing, and custome
Our specialized knowledge in Salesforce, open source and .Net based systems enables u
custom integrated solutions for our clients.

Suyati's custom technology solutions have been deployed in companies in the US, We
Australia, and have helped many enterprises leverage the web/cloud/mobile techno
customers through integrated digital marketing. Suyati is based in Chicago with pro
capability out of the US and India.

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