salesforce

Customer Portal Guide

Salesforce, Summer '22

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WHAT CUSTOMER PORTALS CAN I CREATE WITH SALESFORCE?

Salesforce provides three ways to help you manage your customers.

	Chatter Answers	**Salesforce Customer Portal**	**Self-Service-Portal**
Purpose	Provides customers with a Web Community to resolve their inquiries with other community members or by contacting a support agent	Provides customers with an online support channel to resolve their inquiries without contacting a support agent	Provides customers with an online support channel to resolve their inquiries without contacting a support agent
User Interface	Highly customizable via a point-and-click editor and Visualforce pages, as well as functionality from Salesforce features such as Answers, Customer Portal, Lightning Platform Sites, and Salesforce Knowledge	Highly customizable via a point-and-click editor, as well as functionality similar to Salesforce such as permissions, custom objects, sharing rules, and Web tabs	Customizable via a cascading style sheet (CSS) or point-and-click editor
Supported Record Types	• Articles • Cases • Questions (answers)	• Activities • Assets • Cases • Documents • Solutions • Custom objects	• Cases • Solutions
Quantity	Contact Salesforce for more information	Contact Salesforce for more information	One
Administrator Controls	• Customize the look and feel of the community • Moderate questions and answers • Generate usernames and passwords • Manage Customer Portal user information • Manage Customer Portal users via permissions, roles, and sharing rules	• Customize the look and feel of theCustomer Portal • Generate Customer Portal usernames and passwords • Manage Customer Portal user information • Manage Customer Portal users via permissions, roles, and sharing rules	• Generate Self-Service usernames and passwords • Manage Self-Service user information

What customer portals can I create with Salesforce?

	Chatter Answers	Salesforce Customer Portal	Self-Service-Portal
User Controls	Users can click **Edit My Settings** after they sign in to change their: • Community username • Community password • Locale • Language • Time zone • Notification settings • Contact information	Users can use the Customer Portal Welcome component to change their: • Portal username • Portal password • Locale • Language • Time zone • Contact information	None

SET UP 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.

Whether you call it a portal, a help forum, a support site, or something else, an online community is a great place to connect with customers. Customer Communities have replaced Customer Portals and are where all the updates and development are happening. If you don't have a Customer Portal license, Customer Communities are your only option. If you do have a Customer Portal license, we still encourage you to check out Customer Communities to see what we've been up to and how it can benefit you.

A Salesforce Customer Portal provides an online support channel for your customers—allowing them to resolve their inquiries without contacting a customer service representative. With a Customer Portal, you can customize and deliver a visually stunning user interface to your customers, and use the following Salesforce features to help you and your customers succeed:

- Determine which pages and fields customers see with page layouts and field-level security
- Manage customers with profiles, permission sets, roles, and sharing rules
- Provide and organize documents via Salesforce CRM Content or the Documents tab
- Create a knowledge base for your customers using Salesforce Knowledge
- Allow customers to participate in Ideas communities.
- Display and collect data that is unique to your organization with custom objects
- Display custom s-controls and content from other websites via Web tabs
- Provide customized reports via the Reports tab

> **Note:** High-volume portal users are available for customer portals or communities intended for many thousands to millions of users.

Setting up your Customer Portal consists of the following steps:

1. Enable the Customer Portal.

2. Create one or more portals.

   For each portal:

   a. Configure the settings and communication templates.

   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 on page 8.

   The Convert Portal User Access wizard automatically displays after the first time you save settings for your first portal, whether it is the Customer Portal or partner portal. You can use this wizard to help ensure that records and folders owned by Salesforce users are not shared with portal users.

   b. Customize the fonts and colors.

      c. Customize the available tabs and tab order.

      d. Configure portal languages.

3. Optionally, if available to your portal user licenses, you can enable Salesforce CRM Content, Ideas, Answers, Entitlement Management or Salesforce Knowledge as needed.

4. Create Customer Portal profiles.

    For each profile:

      a. Customize page layouts. See Customize Your Customer Portal Pages.

      For set up tips and general information about Salesforce Customer Portal pages, see Setup Tips and Considerations for Customer Portal Pages on page 18.

      b. Customize 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.

      c. Customize 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.

5. Set up workflow:

      a. Set up workflow rules or case assignment rules to automatically assign cases created by portal users to Salesforce users or queues by using the criteria *Current User: User Type contains 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 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

      b. Create workflow alerts or case auto-response rules to automatically respond to portal users when they create a case on your portal.

6. Configure portal user access.

7. Grant high-volume portal users access to objects.

8. Optionally, enable single sign-on.

9. Enable login on each Customer Portal.

10. Add a link on your organization's website to the portal.

    Users can navigate to your Customer Portal after you copy the `Login URL` from your portal's settings and paste it into the HTML of your website. For more information, see Enable Customer Portal Login and Settings on page 9.

11. Enable contacts to use your portal.

    Enable Your Customer Portal

    Creating Multiple Customer Portals

    Enable Customer Portal Login and Settings

Enable Your Customer Portal

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.

    - 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 on page 9.

Considerations for the Convert Portal User Access Wizard

Your Customer Portal and partner portal users appear in the role hierarchy, however, they're external contacts who don't need access to your organization's internal data. When setting up a Customer Portal or partner portal, you can use the Convert Portal User Access wizard to help ensure that no records or folders are shared with a portal user.

Use the Convert Portal User Access Wizard

Considerations for the Convert Portal User Access Wizard

Your Customer Portal and partner portal users appear in the role hierarchy, however, they're external contacts who don't need access to your organization's internal data. When setting up a Customer Portal or partner portal, you can use the Convert Portal User Access wizard to help ensure that no records or folders are shared with a portal 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.

When you first save a Customer Portal or partner portal, Salesforce automatically displays the Convert Portal User Access wizard.

The wizard affects the following areas of your Salesforce org:

Sharing Rules

The Convert Portal User Access wizard converts any owner-based or criteria-based sharing rules that include the Roles, Internal and Portal Subordinates data set category to include the Roles and Internal Subordinates data set category instead.

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

> **Note:** After running the Convert Portal User Access wizard, you must recalculate the sharing rules to apply the changes. From the Setup `Quick Find` box, enter `Sharing Settings`. Under `Account Sharing Rules`, click **Recalculate**, then click **OK**.
>
> The Roles, Internal and Portal Subordinates data set category is only available in your organization after you create at least one role in the role hierarchy.
>
> The Roles and Internal Subordinates data set category is only available in your organization after you create at least one role in the role hierarchy *and* enable a portal.

Folder Sharing

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

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

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

Manual Sharing

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

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

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

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

Replace AccountShare with the share object that you are querying.

Apex Managed Sharing

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

Public Groups

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

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

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

Queues

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

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

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

List Views

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

Use the Convert Portal User Access Wizard

📝 **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 Customer Portal or partner portal, you can use the Convert Portal User Access wizard to help ensure that no records or folders are shared with a portal user.

To use the wizard:

1. For the Customer Portal, from Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**. For the partner portal, from Setup, enter `Partners` in the `Quick Find` box, then select **Settings**.

2. Click the **Convert Portal User Access** link.

3. Select the checkboxes next to the sharing rules you want to convert to Roles and Internal Subordinates.

   If there are no sharing rules to convert but you want to convert the access level for folders, proceed to the following step.

4. Click **Next**.

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

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

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To set sharing rules:
- Manage Sharing

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

6. Click **Next**.

7. Click **Save** to apply your selected changes.

Creating Multiple Customer Portals

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 Set Up Your Customer Portal on page 3.

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 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

- 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.

- 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`

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USER PERMISSIONS

To create multiple Customer Portals:
- Customize Application

`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 on page 9.
- 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 on page 23.

Enable Customer Portal Login and Settings

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`	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.
`Description`	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.
`Login Enabled`	Allows users to log in to the Customer Portal. We recommend that you do not select this checkbox until you have completed the steps described in Setting Up Your Customer Portal. 📝 **Note:** 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.
`Administrator`	Click the lookup icon (🔍🔍) to choose a default administrator for your Customer Portal. All email notifications regarding users who

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
	self-register for your Customer Portal will be sent to this Salesforce user.
	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.
	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.

Portal Default Settings

Setting	Description
Login URL	The URL of the Web page that displays when users log in to your Customer Portal.
	You can click this URL to log in to your portal and interact with it.
	Insert this URL into your website so users can access the login page to your Customer Portal.
	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.
Logout URL	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.
Top-Level Category for Portal	The top-level category accessible by customers in the Customer Portal. Customers can view all solutions marked `Visible in Self-Service Portal` in this category and its subcategories.
	This field is available only if you have enabled solution browsing.
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

Portal Default Settings

Setting	Description
	solution that helps them solve a case, he or she can click **Yes, please close my case** 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. 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 Available for Use.
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 Available for Use.
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 **Forgot your password?** on the login page of the Customer Portal. By default, a sample template is automatically selected for you. You can also create your own template or

Email Notification Settings

Setting	Description
	modify the sample. Be sure to mark the template as `Available for Use.`
`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 `Available for Use.`
`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 `Available for Use.`

📝 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`	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.
	The files you include in the `Header` and `Footer` lookup fields can have a combined size of up to 10 KB.
	We recommend that you do not add a header *and* a logo to your portal because they may not display properly together.
	You can position the logout link anywhere on the header by using the HTML tag: "`<a href="/secur/logout.jsp">Logout</a>.`"
`Footer`	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.
	The files you include in the `Header` and `Footer` lookup fields can have a combined size of up to 10 KB.

Look and Feel

Setting	Description
Logo	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 `Externally Available Image`. The file you include in the `Logo` lookup field can be up to 20 KB. We recommend that you do not add a header *and* a logo to your portal because they may not display properly together.
Login Message	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. The file you include in the `Login Message` lookup field can be up to 2 KB.

Self-Registration Settings

Setting	Description
Self-Registration Enabled	Allows existing contacts to register themselves for access to your Customer Portal. When you select this checkbox and add the `Allow Customer Portal Self-Registration` checkbox to contact page layouts, contacts whose records are marked `Allow Customer Portal Self-Registration` 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 **Submit** 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: • Existing user, from which the user can enter another email address or click a **Forgot Password?** link to retrieve his or her password. • New user, which informs the user that the email address he or she submitted does not match an existing contact in your organization. If an administrator has implemented Web-to-Case or Web-to-Lead to capture new user

Self-Registration Settings

Setting	Description
	information, then the user can click a link to enter his or her information on the appropriate form.
	• 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.
	• 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 `Allow Customer Portal Self-Registration` 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.
	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.
	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.
`New User Form URL`	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.
	The URL to this form is offered via the template selected in the `Registration Error Template` field to self-registering users who lack an existing contact record, so that their information can be captured and converted to a contact.
`Registration Error Template`	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 `Available for Use`.
	The `From Email Address` and `From Email Name` fields on Customer Portal settings specify who this template is sent from.
`Default New User License`	Click the lookup icon (🔍🔍) to choose a default portal user license for users who self-register for your Customer Portal.

Self-Registration Settings

Setting	Description
`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. You cannot delete the profile selected as the default portal profile.

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

Customize Your Customer Portal Fonts and Colors

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.

1. From Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.

2. Select the name of your Customer Portal.

3. Click **Change Portal Fonts and Colors**.

4. 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.

5. 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.
`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.

Tab Styles

Theme Attribute	Description
Other Tab Border	Border color
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.
	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.
	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 Header Text	Text color and font on the headers of search, related lists, recent items, solution categories, and document folders.
	Optionally, you can change the font of the text from the drop-down list.

Section Styles

Theme Attribute	Description
Left Border	Border to the left of search, related lists, recent items, solution categories, document folders, and the Create New drop-down list.
	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.
	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.
	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.
	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.
	Optionally, you can change the font of the text from the drop-down list.

List Styles

Theme Attribute	Description
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

Customer Portal User Licenses and Custom Objects

> 📝 **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 maximum number of custom objects you can include in a Customer Portal depends on the total number of custom objects your Edition allows.

Also, user licenses control the number of custom objects a portal user can see in a Customer Portal. For information, contact Salesforce.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

Setup Tips and Considerations for Customer Portal Pages

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.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

- 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`, and `Select 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 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 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 soution 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 on page 9.
- 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 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 on page 30.

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 on page 25.

Answers

For setup information, see Enabling Answers in the Customer Portal on page 25.

Ideas

For setup information, see Enabling Ideas in the Customer Portal on page 29.

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 on page 59.

📝 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 on page 59.

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 on page 59.

> 📝 **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 on page 28.
- 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 on page 50.
- Add the `Entitlement Name` lookup field to case page layouts so that portal users can add entitlements to cases.
- 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 on page 59.

Service Contracts

- For set up information, see Enabling Entitlement Management in the Customer Portal on page 28.
- 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 on page 50.
- 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 on page 23.
- 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.

CUSTOMIZE 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
- 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. 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 Enabling Ideas in the Customer Portal on page 29.

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 on page 23.

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 on page 25.

Enable Answers in the Customer Portal

Enable Salesforce CRM Content in the Customer Portal

Enable Entitlement Management in the Customer Portal

Enable Ideas in the Customer Portal

Enable Salesforce Knowledge in the Customer Portal

Enable Answers in the 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.

You can use the Customer Portal to provide your customers with access to an answers community.

To enable answers in your portal:

1. Set up your Customer Portal.

2. Set up answers, making sure that your answers community is configured to display in the Customer Portal.

3. Add the Answers tab to your Customer Portal.

4. Create Customer Portal users:

   a. On the contact detail page, click **Manage External User** and then choose **Enable Customer User**.

   b. Enter the required information, making sure to select the correct Customer Portal profile from the **Profile** drop-down menu.

   c. Click **Save**.

5. If you want your Customer Portal users to have different category group visibility settings than the account owner, change the visibility settings for the Customer portal user.

   By default, Customer Portal users inherit their category access from the account owner. For example, if the account owner has a role of CEO and the CEO role has full access to all the data categories in the category group assigned to answers, then Customer Portal users can also access all categories in the answers community. In some cases, you may want to limit which categories a Customer Portal user can access.

6. If you have high-volume portal users, make the data categories these users need to access visible through permission sets or profiles.

7. 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 Customize Your Customer Portal Tabs on page 23.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To set up and update the Customer Portal:
- Customize Application

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

To create an answers community:
- Customize Application

Enable 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 Manage Content Permissions

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

To add users to a Salesforce CRM Content library:	Manage Salesforce CRM Content
	OR
	`Manage Library` checked in your library permission definition

> **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.

Enable Entitlement Management in the 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.

You can use the Customer Portal to provide your customers with access to their entitlements and service contracts. Contract line items don't display in the Customer Portal.

> 📝 **Note:** High-volume customer portal users do not have access to service contracts and entitlements.

After you have set up entitlement management and enabled a Customer Portal, complete the following steps to add entitlement management to your portals.

1. Update Customer Portal profiles:

   a. Clone Customer Portal profiles and enable the "Read" permission on entitlements or service contracts.

   b. Optionally, on the profiles of delegated external user administrators, enable the "Create" and "Delete" permissions on entitlement contacts. This lets delegated external user administrators update entitlement contacts.

   c. In the cloned profiles, verify that the tab visibility for the Entitlements or Service Contracts tabs are Default On.

2. At the bottom of the customer portal detail page, click **Edit Profiles** and activate the new profiles.

3. Customize case page layouts to add the `Entitlement Name` lookup field. This lets portal users add entitlements to cases.

4. Optionally, customize related lists on accounts and contacts to add Entitlements. This lets delegated external user administrators create cases automatically associated with the right entitlements.

5. Add the Entitlements or Service Contract tabs to each Customer Portal.

6. Assign the cloned profiles to your Customer Portal users:

   a. To create a new Customer Portal user, click **Manage External User** and choose **Enable Customer User** on the contact detail page. To update an existing user, click **Manage External User** and choose **View Customer User**.

   b. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.

   c. Click **Save**.

Enable Ideas in the 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.

Ideas is available in the Customer Portal.

After you have set up your Customer Portal, follow the steps below to enable Ideas in your portal.

1. Create zones in the Ideas context that are active and configured to display in the portal.

2. Add the Ideas tab to your Customer Portal. For more information, see Customize Your Customer Portal Tabs on page 23.

3. 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 Customize Your Customer Portal Tabs on page 23.

EDITIONS

Available in: Salesforce Classic (not available in all orgs)

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

USER PERMISSIONS

To set up and update the Customer Portal:
- Customize Application

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

To customize Ideas:
- Customize Application

Enable Salesforce Knowledge in the 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.

You can use the Customer Portal to provide your customers with access to Salesforce Knowledge articles. Portal users can view and rate articles but cannot create or edit articles.

After you have set up Salesforce Knowledge in your organization and enabled your Customer Portal, complete the following steps to enable Salesforce Knowledge in your portals.

1. Update Customer Portal profiles:

   a. Clone the Customer Portal User or Customer Portal Manager profiles and enable the "Read" permission for article types you want to share with customers.

   b. In the cloned profiles, verify that the tab visibility for the Articles tab is Default On.

2. At the bottom of the customer portal detail page, click **Edit Profiles** and activate the new profile.

3. Assign the cloned profiles to your Customer Portal users:

   a. To create a new Customer Portal user, click **Manage External User** and choose **Enable Customer User** on the contact detail page. To update an existing user, click **Manage External User** and choose **View Customer User** on the contact detail page.

   b. For a new user, select the cloned profile from the **Profile** drop-down menu. For an existing user, click **Edit** and then select the profile.

   c. Click **Save**.

4. Add the Articles tab to each Customer Portal.

5. If you want your Customer Portal users to have different category group visibility settings than the account owner, change the visibility settings for the Customer Portal user..

   By default, Customer Portal users inherit their data category access from the account owner. For example, if the account owner has a role of CEO and the CEO role has full access to all the data categories in a category group, then Customer Portal users can also access all categories in that group. In some cases, you may want to limit which categories a Customer Portal user can access.

6. If you have high-volume portal users, make the categories these users need to access visible by default. Because high-volume portal users don't have roles, they can only access categorized articles if the associated data categories have been made visible to all users regardless of role.

7. Notify users who create articles that they must select **Customer Portal** as a channel option when creating or modifying an article. If the Customer Portal channel is not selected, the article will not be published in the portal.

8. To allow users to search for articles from the Home tab, add the Article Search component to the home page layout. Ensure that you assign the layout to the Customer Portal profiles.

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.

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 Customize Your Customer Portal Tabs on page 23.

CONFIGURING MULTILINGUAL HTML MESSAGES FOR 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.

If your organization has multiple languages enabled, you can upload HTML messages in any of the languages supported by Salesforce and configure the messages to display in the portal based on portal user language settings. For example, you can upload an HTML message in French to display on the Home tab for portal users with French language settings, and an HTML message in English to display on the Home tab for portal users with English language settings.

Note the following before configuring multilingual HTML messages:

- Before you can add a multilingual HTML message to a portal, you must upload the HTML-formatted file in the Documents tab.
- Even if configured, portal HTML messages will not display on the Ideas, Reports, Content, or Solutions tabs.

To configure multilingual HTML messages:

1. To configure a display language for the Customer Portal, from Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.

2. Click the name of the portal to edit.

3. Click **Add New Language** in the Assigned Languages related list.

4. Select a language from the `Language` drop-down list.

5. Click the lookup icon (🔍 🔍) next to a tab name, then select the HTML message to display on that tab. Optionally repeat this step for each tab that you want to display an HTML message.

6. Click **Save**.

ENABLE SINGLE SIGN-ON FOR PORTALS

Single sign-on (SSO) lets users access authorized network resources with one login. You validate usernames and passwords against your corporate user database or other client app rather than Salesforce managing separate passwords for each resource.

You can set up partner portals to use SAML single sign-on, so that a customer only has to login once.

> **Note:** Single sign-on with portals is only supported for SAML 2.0.

To enable single sign-on for portals:

1. In addition to the SAML sign-on information that must be gathered and shared with your identity provider, you must supply your information provider with the Organization ID and the Portal ID. In the SAML assertion that is sent from your identity provider, the `portal_id` and `organization_id` must be added as attributes.

   > **Note:** You can leave these attributes blank to differentiate between portal and platform users. For example, when blank, the user is a regular platform user and when populated, the user is a portal user.

   a. From Setup, enter `Company Information` in the `Quick Find` box, then select **Company Information** and copy the ID located in the `Salesforce Organization ID`.

   b. For partner portals, from Setup, enter `Partners` in the `Quick Find` box, then select **Settings**. Next, click the name of the partner portal, and copy the ID located in the `Salesforce Portal ID`.

WHAT IMPACT DOES COMMUNITIES HAVE ON CUSTOMER PORTAL CUSTOMERS?

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 continue to use their portals will see the following changes:

- Permissions and Fields Renamed
- Permission Changes for External User Management
- Delegated Administrators Can Manage Partner Portal Users and Customer Portal Users
- Delegated Administration Available to Additional Licenses
- `Visible in Self-Service` Field on Activities Renamed to `Public`
- Behavior of `Available for Customer Portal` Checkbox on Custom Objects Changes if Communities is Enabled

Permissions and Fields Renamed

The following permissions and fields have been renamed to work across portals and communities. These fields have changed regardless of whether you enable Communities.

New Value	Old Value	Type
Manage External Users	Manage Partners	User permission
Manage External Account	Work With Portal (on account)	Field label
Manage External User	Work With Portal (on contact)	Field label
Delegated External User Administrator	Delegated Portal User Administrator	User permission
Convert External User Access Wizard	Convert Portal User Access Wizard	Sharing Tool

Permission Changes for External User Management

When your enable Communities in your organization, the permissions required to manage customers users have changed. Customer users include users with Customer Community or Customer Portal licenses.

Action	Requirements with Communities Enabled	Requirements without Communities Enabled
To create customer users:	"Manage External Users" OR "Edit Self-Service Users"	"Edit Self-Service Users"

What impact does Communities have on Customer Portal customers?

Action	Requirements with Communities Enabled	Requirements without Communities Enabled
To see and use the Manage External User drop-down button on Contacts:	"Manage External Users" OR "Edit Self-Service Users" AND "Read" on the account associated with the customer user	"Edit Self-Service Users" AND "Read" on the account associated with the customer user
To view the Log in as option in the Manage External Users drop-down button:	"Manage External Users" OR "Edit Self-Service Users" AND "Edit" on the account associated with the customer user	"Edit Self-Service Users" AND "Edit" on the account associated with the customer user

Delegated Administrators Can Manage Partner Portal Users and Customer Portal Users

Starting in Summer '13, external users with the "Delegated External User Administrator" permission can manage both partner portal and Customer Portal users under the same account. The delegated administrator can only manage users who have one of the profiles in their Delegated External User Profiles related list and are under the same account.

Delegated Administration Available to Additional Licenses

Users with the following user licenses can now manage external users, if they have the Manage External Users permission:

- Lightning Platform - One App
- Salesforce Platform
- Chatter Only

`Visible in Self-Service` Field on Events and Tasks Renamed to `Public`

The `Visible in Self-Service` checkbox on activities has been renamed to `Public`.

If your organization has enabled Communities, tasks or events marked Public are visible to any external user in the community, as long as the user has access to the record the task or event was created on. If a task or event isn't marked Public, only internal users and the task owner can see it.

This field now applies to partner users in Communities too.

The existing behavior for Customer Portal users hasn't changed.

Behavior of `Available for Customer Portal` Checkbox on Custom Objects Changes if Communities is Enabled

If you turn on Communities in your organization, the `Available for Customer Portal` checkbox on custom objects no longer appears and all custom objects are available for use in your communities. If, before enabling Communities, you had a Customer Portal and custom objects that didn't have the `Available for Customer Portal` checkbox selected, those objects become available for use in your Customer Portal.

While the custom objects are available for use in your community or Customer Portal, keep in mind that you still need to perform some setup so that they will appear. To make a custom object appear, you must set the custom object permissions so that users have the appropriate access, set the tab visibility to Default On, and add the tab to the community or 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.

Characteristics

High-volume portal users:

- Are contacts enabled to access a Customer Portal.
- Are assigned to the High-Volume Customer Portal or 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 on page 40.

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 to territories.

  Give Access to Records Using Sharing Sets

  Use sharing sets to grant portal or community users access to records that are associated with their accounts or contacts.

  Grant High-Volume Portal Users Access to Records

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

  Grant High-Volume Portal or Community Users Access to User Records

  Grant users access to other users using sharing sets.

  Share Records Owned by High-Volume Portal Users to Salesforce Users

  View Sharing Sets for High-Volume Portal Users

Give Access to Records Using Sharing Sets

Use sharing sets to grant portal or community users access to records that are associated with their accounts or contacts.

Available in: Salesforce Classic and Lightning Experience

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

Determine how access is granted using an access mapping in the sharing set. Access mappings support lookups from the user and target record to the account or contact. You can determine the objects to use in the access mapping, and they must both either point to an account or contact.

For example, you can use a sharing set if you would like to:

- Grant users access to all cases related to their account or contact record.
- Grant users access to all cases related to a parent account or contact that is identified on the user's account or contact record.

Sharing sets can be used with these user licenses:

- Authenticated Website
- Customer Community Login
- Customer Community Plus
- Customer Community
- Partner Community
- High Volume Customer Portal
- High Volume Portal
- Overage Authenticated Website User
- Overage High Volume Customer Portal User

The following example shows an access mapping on a sharing set. This example grants portal or community users access to all cases associated with the entitlements on their account, even if they are not directly associated with the case.
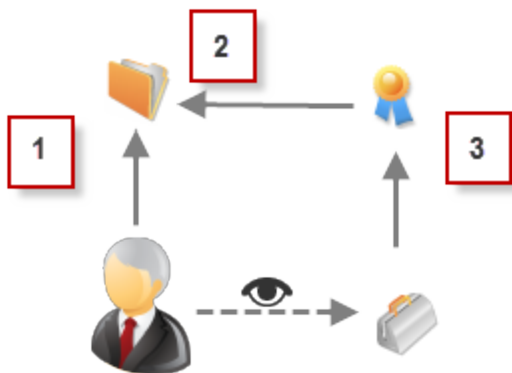
👁 Example:

1. Account lookup on portal or community user

2. Related account on entitlement

3. Entitlement lookup on case

Sharing Set Considerations

- Records shared via sharing sets can be seen in reports, as reports use the same underlying framework as list views and SOQL queries.

- Records visible on reports through sharing sets still respect the limitations on sharing sets. For example, records shared via sharing sets aren't visible based on role hierarchies.

- Portal or community users gain access to all order entitlements and order items under an account to which they have access.

- To share records owned by high-volume portal users, use a share group instead.

Grant 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**.

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

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

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

> Note: Objects with **Set Up** in the Action column aren't configured for high-volume 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 on page 38.

8. 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.

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

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

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

Grant High-Volume Portal or Community Users Access to User Records

Grant users access to other users 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.

You can create a sharing set to grant high-volume portal users access to internal users or other users in the same portal, enabling them to see or edit the target user records.

With Spring '14, you can also grant access to users in other portals through an indirect lookup to an account or contact.

To grant access to selected users in the same portal, you would typically create a sharing set if you deselected the `Portal User Visibility` checkbox on the Sharing Settings page.

To create a sharing set to grant access to other users:

1. From Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.

2. In the Sharing Settings for High-Volume Portal Users 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. Select the profiles of the users you want to have access.

5. Select the User object.

   Target users can be other high-volume portal or community users or internal users.

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

7. Grant access based on an account or contact lookup:

   - Select a value in the User drop-down list to determine the account or contact that's related to the user, either by a direct lookup or indirect lookup via an intermediate object.

   - Select a value in the Target User drop-down list to determine the account or contact that's related to the target user, either by a direct lookup or indirect lookup via an intermediate object.

   For example, to grant access to target users associated with another account identified on the user's account record, select `Account.Parent` and `Account` respectively.

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

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

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

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

👁 **Example:** The following example grants your portal users access to users whose contacts are related to the accounts identified on the portal users' managers records. In other words, the account field on the portal user's manager record must match the account field identified on the target user's contact record.
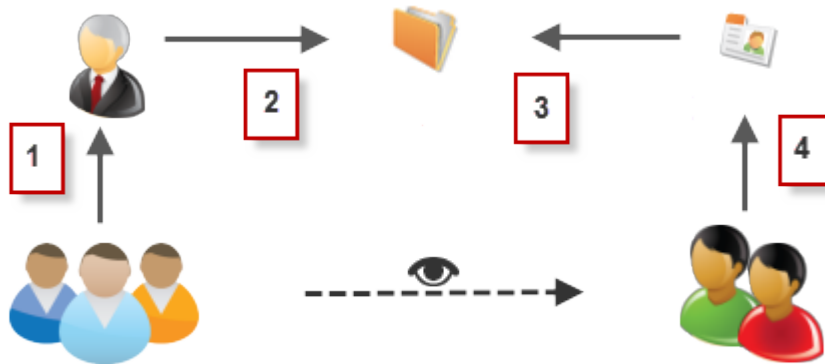
1. Manager lookup on portal user

2. Account lookup on manager

3. Account lookup on contact

4. Contact lookup on target user

In this example, to grant access to the target users, you would select `Manager.Account` and `Contact.Account` in the User and Target User drop-down list respectively.

Share 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:

1. From Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.

2. Click the name of a Customer Portal.

3. Click the Share Group Settings subtab.

4. Click **Activate** to turn on the share group.

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

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

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**.

View Sharing Sets for 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.

Administrators can create sharing sets to grant high-volume portal users access to objects based
on their profiles. To view detailed information about a sharing set:

1. From Setup, enter `Communities Settings` in the Quick Find box, then select
Communities Settings.

2. In the Sharing Set related list, click the name of a sharing set.

The Sharing Set detail page shows the profiles included and the access granted to objects in the
set. On this page, you can do any of the following:

- To edit the sharing set, click **Edit**.
- To remove the sharing set, click **Delete**.
- To view the details of an included profile, click its name.
- To change or remove access settings for an object, click the **Edit** or **Del** link next to the object name.

<div style="float:right;border-left:1px solid;padding-left:1em">

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

</div>

ABOUT CUSTOMER PORTAL USER MANAGEMENT

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	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. Because high-volume portal users don't have roles, they aren't included in this or any other sharing rule category.

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
High Volume Customer Portal and Authenticated Website Both user licenses are high-volume portal users (Available to purchase)	High Volume Customer Portal or Authenticated Website profile, or a profile cloned and customized from one of these.	High-volume portal users don't have roles. See About High-Volume Portal Users on page 38. Can't share but can transfer records they own. Can't transfer cases from non-high-volume portal users to them. Can't include 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

User License	Profiles	Roles and Sharing
		custom solution, using tools like Visualforce or the API, where they can access those records.
		Can access custom objects depending on profile settings.
Customer Portal Manager Custom (Available to purchase)	Customer Portal Manager profile or a profile cloned and customized from the Customer Portal Manager profile.	Can assign to either the Executive, Manager, or User role. 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 `Contact Name` field. Can have data shared to them just like other Salesforce users. • Can access custom objects depending on profile settings. • Can access reports depending on profile settings. • Can access Salesforce CRM Content depending on feature license and profile settings. See Enabling Salesforce CRM Content in the Customer Portal on page 25. • Can receive the "Portal Super User" and "Delegated External User Administrator" permissions.
Customer Portal Manager Standard	Customer Portal User profile or a profile cloned and customized from the Customer Portal User profile.	Can only assign to either the Executive, Manager, or User role. 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 `Contact Name` field. Can have data shared to them just like other Salesforce users. • Can access custom objects depending on profile settings. • Can receive the "Portal Super User" permission. • Can access Salesforce CRM Content depending on feature license and profile settings. See Enabling Salesforce CRM Content in the Customer Portal on page 25. 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.

Work with Customer Portal Users

Work with Customer Portal Users

> 📝 **Note:** High-volume portal users are available for customer portals or communities intended for many thousands to millions of users.

Some common tasks when managing Customer Portal users include:

- Setting up the Customer Portal for users
- Enabling Customer Portal users individually from the Contacts tab
- Disabling and deactivating Customer Portal users
- Changing Customer Portal users' information and roles
- Changing Customer Portal users' accounts
- Merging Customer Portal users
- Resetting Customer Portal users' passwords
- Viewing Customer Portal users' user licenses
- Granting high-volume portal users access to object's records
- Sharing high-volume portal users' records with Salesforce users
- Managing Customer Portal users' permissions and access settings
- Assigning profiles to a Customer Portal
- Delegating Customer Portal user management and case and contact management to portal users
- Reporting on Customer Portal users

> 💡 **Tip:** To troubleshoot issues for Customer Portal users, click **Manage External User** and choose **Log in to Portal as User** on the portal user's contact detail page. This selection opens a new browser window and automatically logs you into the portal as the portal user. This option also ensures that the portal is configured appropriately.
>
> The **Log in to Portal as User** button is only available if you have the "Edit Self-Service Users" permission and "Edit" access on the account. The **Log in to Portal as User** button does not display for inactive portal users.

CONFIGURE USER ACCESS TO THE 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.

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 Set 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 on page 18.

7. Optionally, allow contacts to register themselves for access to your portal. See Enable Customer Portal Login and Settings on page 9.

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.

Roles Per Customer Portal Account

Disable and Deactivate Portal Users

Disable Customer Accounts

Disabling a customer account disables customer users associated with the account. We recommend disabling a customer account only if the account was accidentally enabled.

Edit Customer Portal User Information

Reset Customer Portal User Passwords

Delegate Customer Portal User Administration and Portal Super User

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.

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.

Roles Per Customer Portal Account

✎ **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 set the default number of roles for Customer Portal accounts. This benefits your customer portal by reducing the number of unused roles for Customer Portal accounts. You must have a Customer Portal enabled to use this functionality.

For example, if you currently have three roles created when an account is enabled for your Customer Portal, but only need one role for new accounts, you can reduce the number of roles to one. You can set up to three roles for Customer Portal accounts. The default number of roles for Customer Portal accounts is three.

To set the number of roles per Customer Portal account:

1. From Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.

2. Click `Set number of roles per Portal Account`.

3. Click **Edit**.

4. In the `Number of Roles` drop-down list, set your default number of roles per Customer Portal account.

5. Click **Save**.

The number of roles for existing portal accounts doesn't change with this setting.

Disable and Deactivate Portal Users

There are two ways in which you can remove a customer's access to your Salesforce Customer Portal or partner portal. As described in detail below, *disabling* a portal user is permanent, while *deactivating* a portal user is not:

Disabling a portal user

Disabling a portal user includes the following actions:

- Termination of the user's access to your portal

- Removal from all groups, teams, and sharing rules with which the user is associated.

- Permanent loss of the portal user's association with the contact

  If you later re-enable a contact for portal access, a new portal user is created that is not related to the previous portal user record in any way.

- The `Role` on the portal user record is removed.

- For partner users, the partner user role becomes obsolete. As a result:

  - The user's data no longer rolls up to the partner account owner role

  - Opportunities owned by that user are removed from your organization's forecast hierarchy

    Note: Before disabling a partner user, we recommend transferring opportunities owned by that user to an active user.

We recommend disabling a portal user if:

- A contact was accidentally enabled as a portal user

- The portal user is associated with a duplicate contact

- You do not want a contact to access the portal in the future

  Note: Salesforce doesn't delete user records, including portal user records. While you can't re-enable a disabled portal user, you can view and update the record for a disabled user in Setup by entering `Users` in the `Quick Find` box, then selecting **Users**.

Deactivating a portal user

Deactivating a portal user prevents that user from logging into your portal and gives you the option to remove the user from any teams in which he or she is a member (for example, case teams and account teams). When you deactivate a portal user, the portal user record does *not* permanently lose its association with the contact. You can reactivate the portal user at any time.

We recommend deactivating a portal user if you may reactivate the portal user in the future.

Disabling a Portal User

To disable a portal user:

1. On the contact detail page, click **Manage External User** and choose either **Disable Customer User** or **Disable Partner User**. On the account detail page of a person account, click **Manage External Account** and choose **Disable Customer Account**.

   Person Accounts are not available for the partner portal.

2. Click **OK**.

Deactivating a Portal User

To deactivate a portal user:

1. For the Customer Portal, click **Manage External User** and choose **View Customer User** on the contact or person account detail page. For the partner portal, click **Manage External User** and choose **View Partner User** on the contact detail page.

Person accounts are not available for the partner portal.

2. Click **Edit**, and deselect the `Active` checkbox.

To reactivate a portal user at any time, select the `Active` checkbox.

3. Click **Save**.

> 📝 **Note:** You can't mass deactivate portal users.

Tips on Disabling and Deactivating Portal Users

Consider the following when disabling or deactivating portal users (*disabling* is permanent; *deactivating* is not):

- You can't delete an active portal user; you can only disable or deactivate his or her access to the portal.
- The following table describes whether you can delete contacts that are associated with portal users:

State of Portal User Associated to Contact	Can You Delete the Contact?
Active portal user	No. This is to ensure that the contact is available if you choose to reactivate the portal user.
Inactive portal user	No. This is to ensure that the contact is available if you choose to reactivate the portal user.
Disabled portal user	Yes. Deleted contacts are sent to the Recycle Bin.

- To delete a portal-enabled contact, first disable the portal user, then delete the contact.
- Cases associated with a portal user are not updated in any way when you disable or deactivate the portal user. For example, if a portal user owns a case, and the portal user is disabled, he or she remains the owner of the case until the case is updated with a new owner.
- Before you disable a partner user, we recommend that you transfer any opportunities owned by the user to another user who will remain active. This is because when you disable a partner user, any opportunities he or she owns are removed from your organization's forecast hierarchy (the partner user's role becomes obsolete).
- After you disable a portal user, it may take Salesforce up to ten seconds to disable the user. During that time, a portal user may still perform actions on a portal.
- You can remove the **Disable Customer User** and **Disable Partner User** buttons from contact page layouts at any time. Doing so would prevent users with the "Edit Self-Service Users" or "Manage External Users" permissions from disabling portal users.
- A disabled or deactivated portal user does not count against your organization's available user licenses. However, disabling or deactivating a portal user does not reduce the number of licenses for which your organization is billed; you must change your organization's license count to change your billing.

- To disable *all* portal users associated with an account and permanently delete all of the account's portal roles and groups:

    – Click **Manage External Account** and choose **Disable Partner Account** on a partner portal account.

    – Click **Manage External Account** and choose **Disable Customer Account** on a Customer Portal account or Customer Portal person account.

    You can remove the **Disable Customer Account** and **Disable Partner Account** buttons from account page layouts at any time. Doing so would prevent users with the "Edit Self-Service Users" or "Manage External Users" permissions from disabling portal accounts.

- When you disable a portal user or portal account, the change is tracked in the setup audit trail.

- Portal roles are not removed from disabled portal users associated with person accounts. However, you can remove the portal roles manually:

    1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.

    2. Select the name of a disabled portal user.

    3. Click **Edit**.

    4. Select None from the `Role` drop-down list.

    5. Click **Save**.

Disable Customer Accounts

Disabling a customer account disables customer users associated with the account. We recommend disabling a customer account only if the account was accidentally enabled.

You can't delete customer accounts, but you can disable them. Disabling the account permanently disables up to 100 external users associated with the account and removes them from all communities, groups, teams, permission sets, and sharing rules that they're associated with. This includes both active and inactive external users, but excludes partner users associated with the account. Additionally, roles and groups associated with the account are permanently deleted and you won't have the option to restore them from the Recycle Bin.

> **Note:** You can't disable an account if there are more than 100 active or inactive external users associated with it. You must disable the users before disabling the account.

1. Go to the Account detail page for the account you want to disable.

2. Click **Manage External Account**, then click **Disable Customer Account**.

3. Click **OK** to confirm.

If you decide to re-enable the account in the future, you can re-enable individual contacts as Customer Portal users. Re-enabling a contact for a Customer Portal creates a new customer portal user record and role that is not associated with the previous customer portal user record and role. You can't restore deleted roles and groups.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view accounts:
- Read on accounts

To create or disable accounts:
- Create on accounts

To enable a customer account:
- Manage External Users

Edit Customer Portal User Information

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 AND Customize Application
To set sharing rules:	Manage Sharing

> 📝 **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 edit Salesforce Customer Portal user information for contacts associated with accounts you have permission to access. To edit information for a Customer Portal user:

1. From Setup, enter *Users* in the Quick Find box, then select **Users**.

2. Click **Edit** next to a user's name.

3. Change the necessary information and click **Save**.

Tips for Editing Customer Portal User Information

Consider the following when editing Customer Portal user information:

- Create a custom list view to display only Customer Portal users by filtering on the Customer Portal Manager and Customer Portal User license types. For example, use the criteria "License Type equals Customer Portal User, Customer Portal Manager."

- When generating a new password for a user, the new password is automatically sent to the user's email address and email verification is not enforced.

- When changing a user's email address to a new email address, email confirmation is enforced.

- Include the Customer Portal Welcome component on home page layouts assigned to Customer Portal users so that, upon logging in to the portal, they receive a welcome message with their name. From the component, a user can change their own portal username, password, locale, language, time zone, and contact information. When portal users change information about themselves, their user record is updated but their contact record is not automatically updated with those changes.

Reset Customer Portal User Passwords

📝 **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.

If a Salesforce Customer Portal user loses his or her password, the user can click the **Forgot your password?** link on the Customer Portal login page to have a new password emailed to him or her.

To reset a Customer Portal user's password:

1. From Setup, enter *Users* in the `Quick Find` box, then select **Users**.

2. Select the checkbox next to the user's name. Optionally, to change the passwords for all currently displayed users, check the box in the column header to select all rows.

3. Click **Reset Password**. The user receives an email that contains a link and instructions to reset the password.

💡 **Tip:** You can 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.

Delegate 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:

Delegate 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.

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.

Provide 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.

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