

Salesforce Experience (Communities) Authentication

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Overview

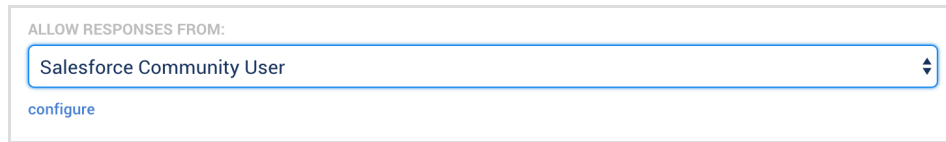
If Salesforce Experience (Communities, Salesforce Portal) authentication is enabled for a form, only authenticated respondents can access the form. Using this authentication combined with the [Salesforce Prefill Connector](#), you can also prefill the form with the authenticated respondent's information.

Please note, we **no longer support using VisualForce to embed FormAssembly forms within Salesforce community**. Instead, please follow the directions below to set up and enable the FormAssembly Lightning Component.

Requirements

You'll need a FormAssembly Team plan or above, and have a Salesforce [Customer](#) or [Partner](#) Portal set up. Additionally, you will need to install the most recent version of the FormAssembly App for AppExchange (see details below for this process).

Enable the Salesforce Communities Authentication



ALLOW RESPONSES FROM:

Salesforce Community User

[configure](#)

1. Select **Processing Options** for the form you'll be working with.
2. In the **Allows Responses From:** section, choose **Salesforce Community Users**.
3. Click **configure**.

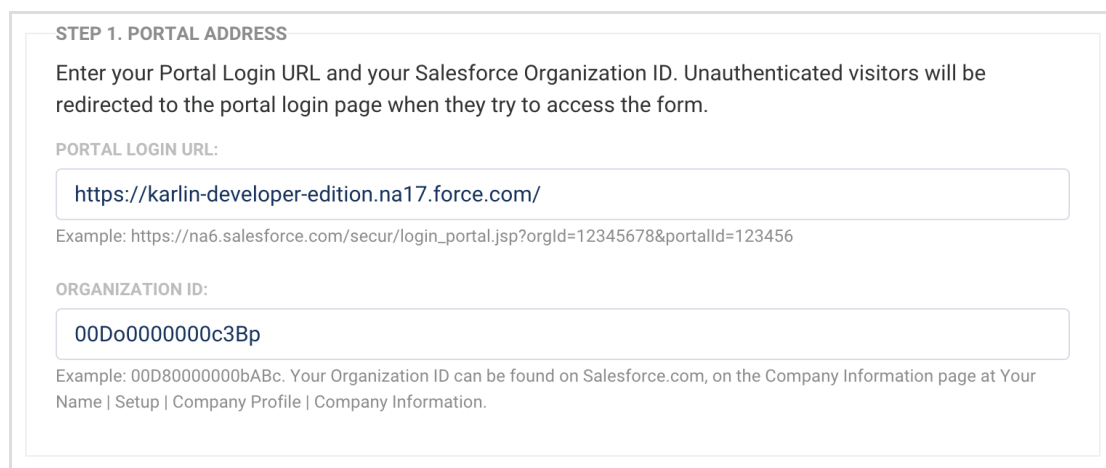
Configure Salesforce Communities Authentication

Step 1. Portal Address & Organization ID

In the configuration page for your form's Salesforce Portal Authentication, the **Portal Login URL** and **Organization ID** are required. By adding in your portal login URL, you will direct all users who are not in a current session to your authentication page to log in to the portal.

If you do not know your portal address, you can access the administration page for your community from Salesforce by going to: setup → customize → communities → all communities. From there, you will see the URL listed next to the Community you are planning on working with.

If you do not know your organization ID, you can access it by going to: setup → company profile → company information.



STEP 1. PORTAL ADDRESS

Enter your Portal Login URL and your Salesforce Organization ID. Unauthenticated visitors will be redirected to the portal login page when they try to access the form.

PORTAL LOGIN URL:

Example: https://na6.salesforce.com/secur/login_portal.jsp?orgId=12345678&portalId=123456

ORGANIZATION ID:

Example: 00D80000000bABc. Your Organization ID can be found on Salesforce.com, on the Company Information page at Your Name | Setup | Company Profile | Company Information.

Note: If you are having issues with your portal login URL, then you should copy the URL, paste it into an incognito browser window, load the page, and then copy the new URL that appears at the top of the browser window and use that for your portal address.

Step 2. FormAssembly Lightning Component

To add your form into your Salesforce Community, you will need to make sure you have installed the most recent version of [FormAssembly for AppExchange](#) so that you can use our [Lightning Component](#).

Once you have installed the most recent version, you can add a FormAssembly component to your Community page.

You will need to use the Form ID and Secret Token provided under step 2 in order to embed the form onto your community page. [More details can be found here](#).

Please note, your form will only be available from the community page where your form is embedded. If a respondent attempts to access the form through a FormAssembly link, it will require authentication, but it will not redirect the respondent back to the form after authentication is completed.

STEP 2. FORMASSEMBLY LIGHTNING COMPONENT

Please [refer to the documentation](#) to install the latest FormAssembly for AppExchange package (v2.6 or above). Then use the following information when adding the [FormAssembly Lightning Component](#) to a Community page.

FORM ID:

SECRET TOKEN

[\(Reset Token\)](#)

Note:

- This form will only work within Salesforce.
- This form will only be accessible to users who have logged into the community portal.
- You may reset the form link by clicking the **reset** link.
- **If you disable and then re-enable** the Salesforce Portal authentication for this form, your form link will change, and you will need update your portal's tabs, links, or buttons accordingly.

Step 3. Options

If [Save & Resume](#) is enabled for your form, you can enable it to automatically resume the last saved response once the user has been authenticated. In order to enable this, you will need to check the box under step 3 of the community configuration page and then hit **apply** at the bottom:

STEP 3. OPTIONS

- ☐ Automatically resume the last saved response once authenticated.
(Applies only if Save & Resume is enabled for this form.)

Authenticated users who save their response will be able to automatically resume their response the next time they log in. (Users who saved more than one response before auto-resume is enabled will still be able to pick which response to resume.)

Step 4. Prefilling Options

If you are using the prefilling connector with your Communities authentication, you can use the %%SF_PORTAL_USER_USERID%% alias in order to lookup a User ID and any information associated with your users. You can [find additional details for prefilling within Salesforce Communities here](#).

In addition, [this help document](#) lists many of the session parameters which are available to you.

Note: You'll need to set up this lookup as a **Formula** and not an unsafe query parameter.

Step 5. Setting Profile API Access

You will also need to give API access to the specific profiles that will be accessing your Community.

This can be done by going to Admin → Manage Users → Profiles → "Name of profile you want to give access to" → Administrative Permissions → API Enabled

The screenshot shows the Salesforce Admin console interface. The left sidebar contains navigation links: Home, About FormAssembly.com, Manage Web Forms, View Responses, Your Account, Support, TestFormWeb, TestWebFormB, Form Responses, Form, and Reports. The main content area displays the 'Profile' settings for 'Customer Community Login User'. Under 'System Permissions', the 'API Enabled' checkbox is checked, indicating that API access is granted to this profile.

Permission Name	Enabled	Description
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>	Allow users to post code snippets from the UI where available.
API Enabled	<input checked="" type="checkbox"/>	Access any Salesforce.com API.
Assign Topics	<input checked="" type="checkbox"/>	Assign existing topics to feed items. Remove topics from feed items.
Can Approve Feed Post	<input type="checkbox"/>	Allows users to set the status of a feed item from pendingReview to Published, which controls the visibility of t

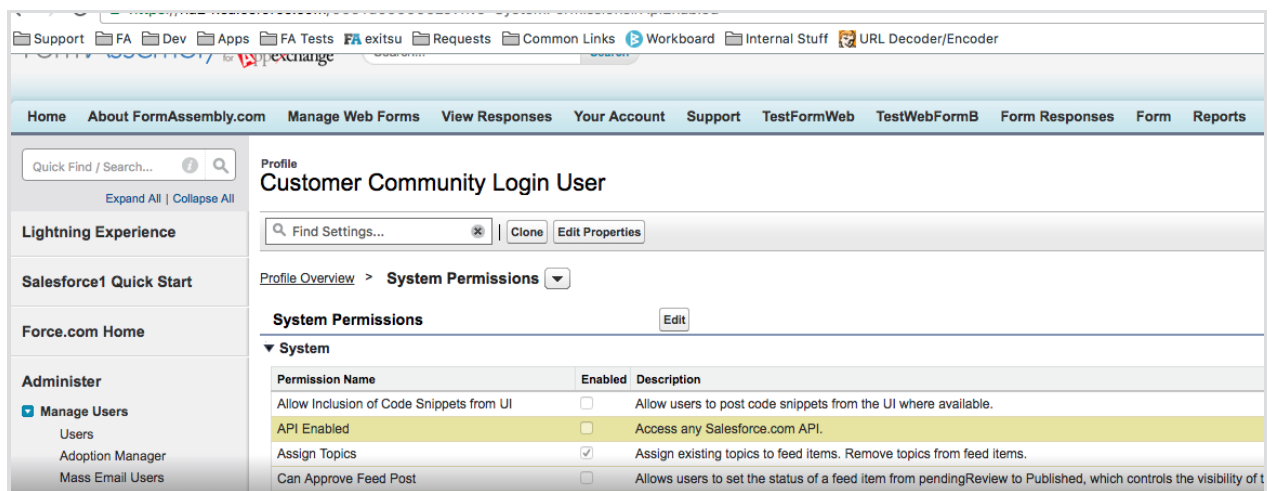
Resolving Common Publishing Issues

If you are running into difficulty getting your form published on your Salesforce Communities page, please read these common issues below to make sure that you've completed the necessary steps for publishing.

Enable API Permission for Community User Profile

Please ensure that you have given API access to the specific profiles that will be accessing your Community.

This can be done by going to Admin → Manage Users → Profiles → "Name of profile you want to give access to" → Administrative Permissions → API Enabled



The screenshot shows the Salesforce Admin console interface. The left sidebar contains navigation links: Home, About FormAssembly.com, Manage Web Forms, View Responses, Your Account, Support, TestFormWeb, TestWebFormB, Form Responses, Form, and Reports. Below these are sections for Lightning Experience, Salesforce1 Quick Start, Force.com Home, and Administer. Under Administer, 'Manage Users' is selected, showing sub-links for Users, Adoption Manager, and Mass Email Users. The main content area displays the 'Customer Community Login User' profile. The 'System Permissions' tab is active, showing a table of permissions. The 'API Enabled' permission is checked.

Permission Name	Enabled	Description
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>	Allow users to post code snippets from the UI where available.
API Enabled	<input checked="" type="checkbox"/>	Access any Salesforce.com API.
Assign Topics	<input checked="" type="checkbox"/>	Assign existing topics to feed items. Remove topics from feed items.
Can Approve Feed Post	<input type="checkbox"/>	Allows users to set the status of a feed item from pendingReview to Published, which controls the visibility of t

Check your Organization ID

Double check that you have entered the correct Organization ID under Step 1 of the configuration process. Your Organization ID can be found by going to Setup → Company Profile → Company Information

Form Access

When using this method, your users will not be able to navigate directly to the form. They will always need to login to your Community, and then click on a link or a tab to be directed to the form.