

Salesforce Experience (Communities) Authentication

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Overview

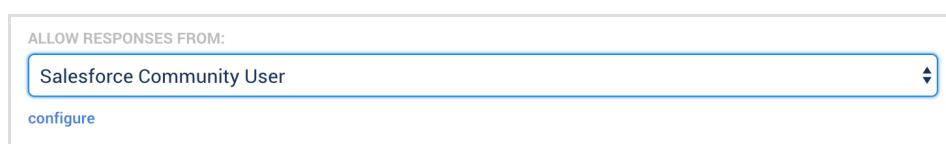
If Salesforce Experience (Communities, Salesforce Portal) authentication is enabled for a form, only authenticated respondents can access the form. When using this authentication combined with the [Salesforce Prefill Connector](#), you can prefill the form with the authenticated respondent's information.

Please note that we **no longer support using VisualForce to embed FormAssembly forms within Salesforce Experience Cloud Sites**. 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



The image shows a screenshot of a configuration interface. At the top, it says "ALLOW RESPONSES FROM:". Below this is a dropdown menu with "Salesforce Community User" selected. To the right of the dropdown is a small downward-pointing arrow icon. Below the dropdown menu, the word "configure" is written in a smaller font.

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 Salesforce Experience Cloud Site from Salesforce by going to **Setup → Feature Settings → Digital Experiences → All Sites**. From there, you will see the URL listed next to the Salesforce Experience Cloud Site you are planning on working with.

If you do not know your organization ID, you can access it by going to **Setup → Company Settings → 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: 00D8000000bABc. 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 to your Salesforce Experience Cloud Site, 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

Experience Cloud Page.

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

Please note that your form will only be available from the Experience Cloud Page where your form is embedded. If a respondent attempts to access the form through a FormAssembly link, it will require authentication but 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 Salesforce 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 to update your portal's tabs, links, and 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. 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.)

An authenticated user who saves their response can automatically resume it the next time they log in. A user who saved more than one response before auto-resume is enabled can pick which response to resume.

Step 4. Prefilling Options

If using the prefilling connector with your Salesforce Community Authentication, you can use the %%SF_PORTAL_USER_USERID%% alias 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 that are available to you.

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

Step 5. Ensure API is Enabled on Experience Cloud User Profile

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

This can be done by going to Setup → Administration → Users → Profiles

- Click **Edit** next to the name of the profile you want to give access to
- Select **Administrative Permissions**
- Select the checkbox for **API Enabled**
- Click **Save Profile**

Administrative Permissions	
Access Community Management	<input type="checkbox"/>
Access Libraries	<input checked="" type="checkbox"/>
Add People to Direct Messages	<input checked="" type="checkbox"/>
Allow Inclusion of Code Snippets from UI	<input type="checkbox"/>
Apex REST Services	<input checked="" type="checkbox"/>
API Enabled	<input checked="" type="checkbox"/>
Can Approve Feed Post and Comment	<input type="checkbox"/>
Close Conversation Threads	<input type="checkbox"/>
Create and Customize List Views	<input type="checkbox"/>
Create and Customize Reports	<input type="checkbox"/>
Create and Own New Chatter Groups	<input checked="" type="checkbox"/>
Create Content Deliveries	<input type="checkbox"/>
Create Public Links	<input type="checkbox"/>
Delegated External User Administrator	<input type="checkbox"/>
Edit My Own Posts	<input type="checkbox"/>
Manage Unlisted Groups	<input type="checkbox"/>
Moderate Communities Feeds	<input type="checkbox"/>
Moderate Communities Files	<input type="checkbox"/>
Moderate Community Users	<input type="checkbox"/>
New Salesforce Mobile App	<input type="checkbox"/>
New Salesforce Mobile App - Customizable Navigation (Pilot)	<input type="checkbox"/>
Password Never Expires	<input type="checkbox"/>
Pin Posts in Feeds	<input type="checkbox"/>
Portal Super User	<input type="checkbox"/>
Remove People from Direct Messages	<input checked="" type="checkbox"/>
Report Builder (Lightning Experience)	<input type="checkbox"/>
Select Files from Salesforce	<input checked="" type="checkbox"/>
Send announcement emails	<input type="checkbox"/>
Send Outbound Messages	<input checked="" type="checkbox"/>
Share internal Knowledge articles externally	<input type="checkbox"/>

Resolving Common Publishing Issues

After you publish your form, if you see "Please wait" or "Form will be displayed here" on your live Experience Cloud Page where the form should be, there are a few settings you will need to check to attempt to resolve this error. [The steps to troubleshoot common issues can be found in this](#)

[help document.](#)
