Salesforce Experience Cloud Authentication

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Overview

If Salesforce Experience Cloud Authentication (formerly Salesforce Community Cloud 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 Salesforce Experience Cloud Authentication

1. Access **Processing** options for the form you'll be working with.

2. In the **Allows Responses From** dropdown, select **Salesforce Experience Cloud Users**.

3. Click **Configure**.

Configure Salesforce Experience Cloud Authentication

Step 1. Portal Address

To begin configuration, Salesforce Experience Cloud Authentication requires your Salesforce **Portal Login URL** and **Organization ID.** By adding your Portal Login URL, all currently unauthenticated users will be redirected to your authentication page to log in.

If you do not know your Portal Login URL, you can access the administration page for your Experience Cloud Site by going to **Setup → Feature Settings → Digital Experiences → All Sites**. From there, copy the URL displayed next to the Salesforce Experience Cloud Site.

If you do not know your Organization ID, you can access it by going to S**etup → Company Settings → Company Information**.

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 the Lightning Component to your Experience Cloud Site.

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 Site 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:

> 4642405

SECRET TOKEN

> eafccabcd288c65e64e763fbcf16c660f30ee432   (Reset Token)

Step 3. Options

If Save & Resume is enabled for your form, you can allow it to automatically resume the last saved response once the user has been authenticated. Select the checkbox beside "**Automatically**

resume the last saved response once authenticated", to enable this option.

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.

Click **Apply** to save your configuration.

Step 4. Prefilling Options

If using the prefilling connector with your Salesforce Experience Cloud Authentication, you can use the %%SF_PORTAL_USER_USERID%% alias to look up a User ID and any information associated with your users. You can find additional details for prefilling within Salesforce Experience Cloud here.

In addition, this help document lists many of the session parameters that are available to you.

> **Note**: Set up this Lookup as a **Formula** - not an unsafe query parameter.

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

To grant API access to the specific profiles that will be accessing your Experience Cloud Site, do the following:

- Go 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**

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 Site 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.