

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

Processing Options

Any changes made in the processing section will be reflected everywhere the form is published, including Workflows.

FORM AVAILABILITY:

STATUS:

Active

Archived (no processing)

ALLOW RESPONSES FROM

Salesforce Experience Cloud User

[Configure](#)

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 **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: 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, copy and paste the URL into an incognito browser window, load the page, copy the updated URL from the address bar, and use that as your Portal Login URL.

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

[\(Reset Token\)](#)

Note:

- This form will only work within Salesforce.
- This form will only be accessible to users logged into your Salesforce portal.
- You may reset the form link by clicking **Reset Token**.
- **If you disable and then re-enable** the Salesforce Experience Cloud Authentication for this form, your form link will change, and you will need to update your Experience Cloud Site's tabs, links, and buttons accordingly.

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.

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.

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**

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