

Infosys Customer Automotive Bolt

Work Instructions

Copyright Notice

"The contents of this document are proprietary and confidential to Infosys Ltd. and may not be disclosed in whole or in part at any time, to any third party without the prior written consent of Infosys Ltd."

© 2019 Infosys Limited, Bangalore, India. All rights reserved. Infosys believes the information in this presentation is accurate as of its publication date; such information is subject to change without notice. Infosys acknowledges the proprietary rights of other companies to the trademarks, product names and such other intellectual property rights mentioned in this document. Except as expressly permitted, neither this presentation nor any part of it may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, printing, photocopying, recording or otherwise, without the prior permission of Infosys Limited and/or any named intellectual property rights holders under this presentation.

Infosys Customer Automotive Bolt

Work Instructions

Applies to:	Salesforce practitioners
Objective:	This document provides instructions for installing the Infosys Automotive Customer Bolt Solution
Policy or Handbook Reference	N/A
Prerequisites	N/A

Introduction

This document provides step-by-step instructions for installing the Infosys Customer Automotive Bolt Solution.

Purpose of application

Development of Salesforce Lightning Bolt Solution for Automotive Industry to reduce the time required to build Customer Community for Car Manufacturing Industry and cut development costs.

Scope

Salesforce Sales, Service Cloud and Community Cloud

Business Case

Currently, a lot of resource and time is spent if one tries to build a community from scratch in Salesforce platform. 'Infosys Automotive Customer Bolt' is industry-specific solution template, with an objective to meet below business requirement:

- Pre- configured Community Template
- Pre- configured Automotive Community Processes
- Reduced Development cost of starting from scratch
- Reduced Cost of developing Customer Community
- Improved CX

Infosys Customer Automotive Bolt

Work Instructions

Solution

Development of Salesforce Lightning Bolt Solution for Automotive Industry is intended for an Automotive Company's end customer who would want to self-help for different processes associated with a car purchase and service.

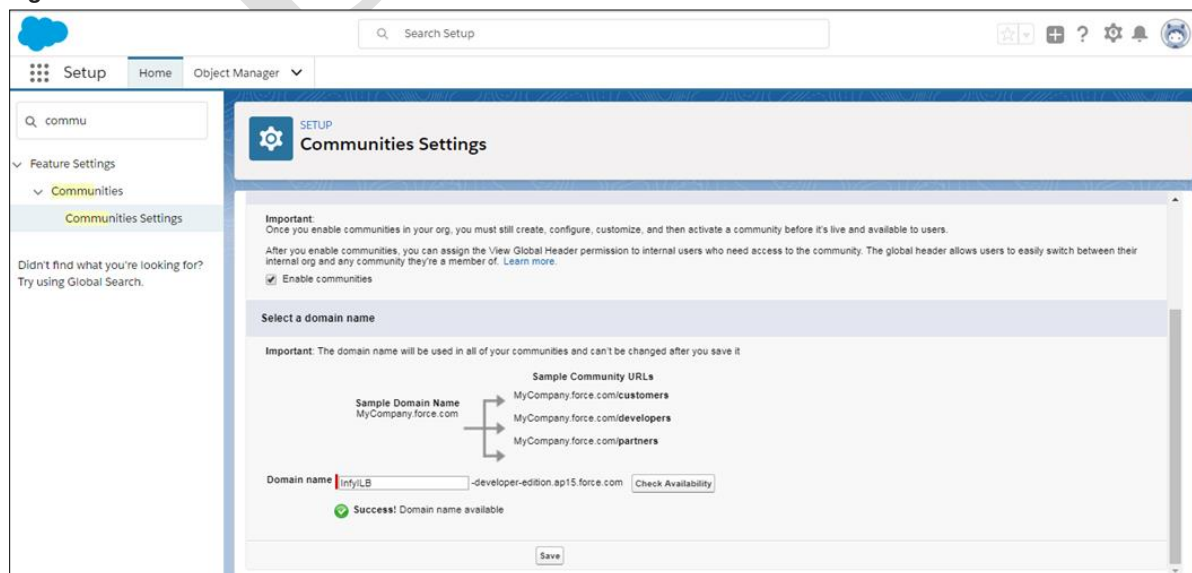
Features

1. Creating connections with consumers on Infosys Automotive Customer Community to enable an intuitive and personalized car servicing experience online
2. Connect Car Buyer, Dealer and Manufacturer on single platform with feature
 - Map based dealer search for current location or based on city
 - Allow Car buyer to look for car based on their requirement and seamlessly book a test drive for the intended car
 - Lead capture for manufacture and dealer within salesforce sales cloud
 - Personalized customer digital experience allowing customers to raise car service request and service complaint.

Prerequisites

- Enable Communities by navigating to Setup-> Feature Settings -> Communities -> Communities Settings
- After selecting "Enable Communities" check box, provide a domain name and save

Figure 1



Infosys Customer Automotive Bolt

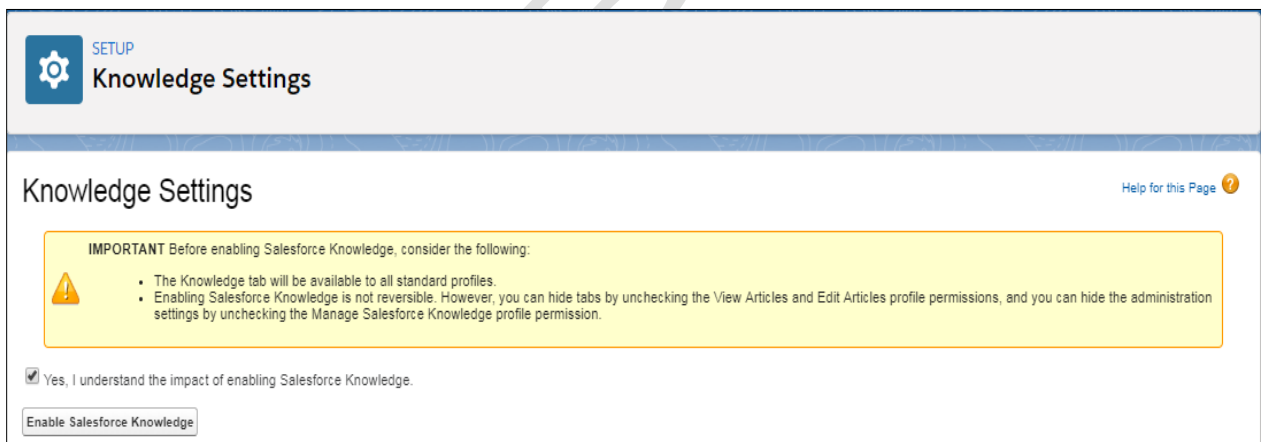
Work Instructions

Figure 2



- Enable “Knowledge User” Check box in User record.
- Enable Knowledge by navigating to Setup-> Feature Settings -> Service -> Knowledge -> Knowledge Settings
- Enable Chatter by navigating to Setup -> Chatter -> Chatter Settings
- Create Role and assign to Community account owner

Figure 3



Infosys Customer Automotive Bolt

Work Instructions

User Manual

Step	Instruction	Illustration	Expected Result
1	Install the package from AppExchange listing	Please refer to Figures 4	Installation is successfully completed

Figure 4

Install Infosys Automotive Customer Bolt
By Infosys

! What if existing component names conflict with ones in this package?

☒ Do not install.
☐ Rename conflicting components in package.

☐ Install for Admins Only
☒ Install for All Users
☐ Install for Specific Profiles...

Install **Cancel**

2	Create Community Create a new community based on Infosys Automotive Customer Bolt - Navigate to Setup-> Feature Settings -> Communities -> All Communities - Click on “New Community” - Select “Infosys Automotive Bolt” Lightning Bolt - Click on “Get Started” on next page - Provide a name to the community. Do not make any changes to the default URL and click “Create”	Please refer to Figures 5 to 9	Community is successfully created
---	--	--------------------------------	---

Infosys Customer Automotive Bolt

Work Instructions

Figure 5

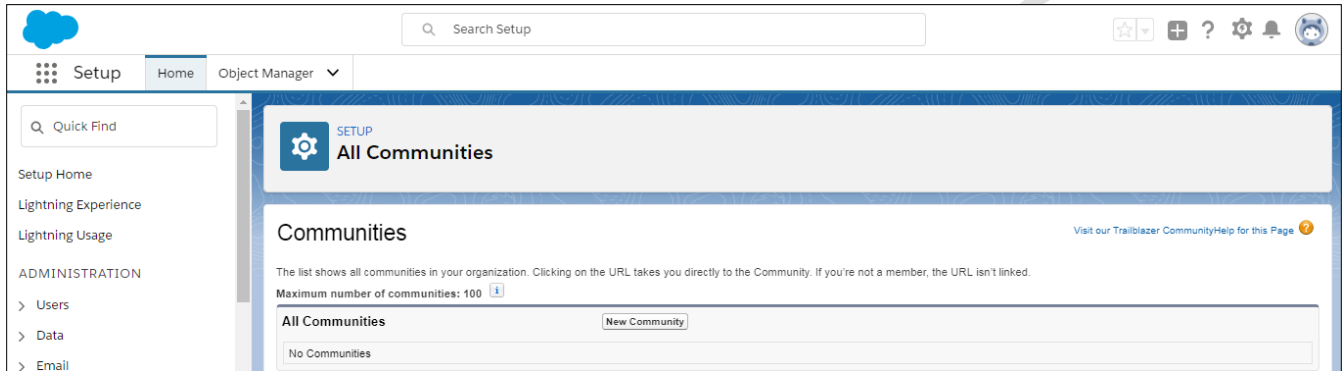


Figure 6

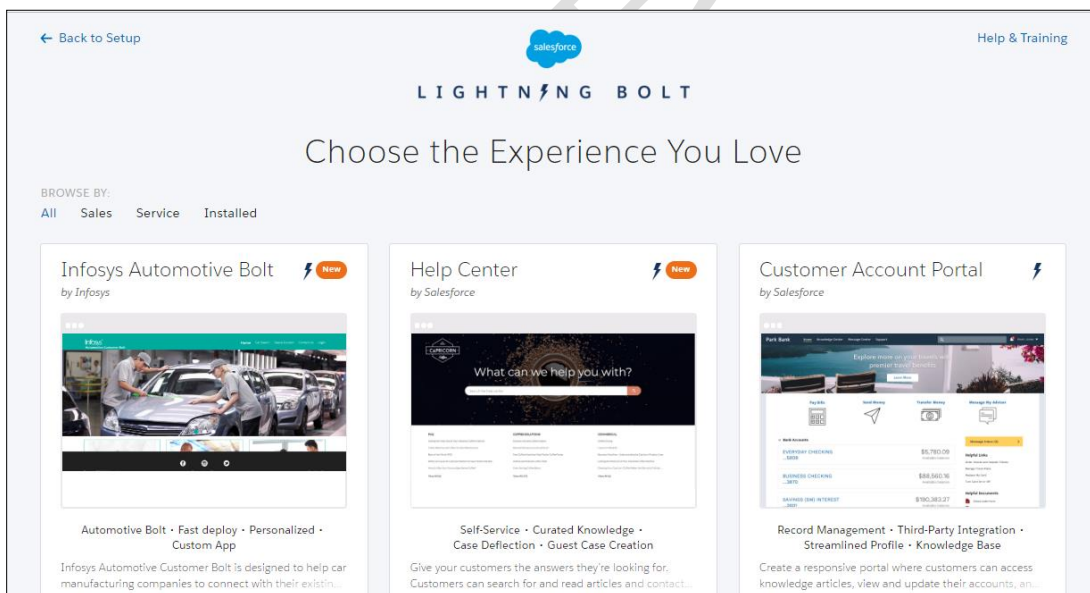


Figure 7



Infosys Customer Automotive Bolt

Work Instructions

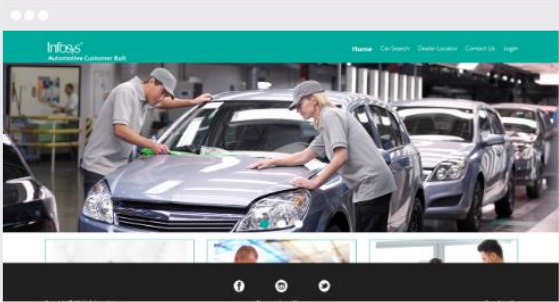
Figure 8

[← Back](#)

salesforce

[Help & Training](#)

LIGHTNING BOLT



Enter a Name

Not sure what to enter? Don't worry—you can always change it later.

Name

URL

Create

Figure 9

Community Workspaces

ILB

ILB (Preview · Unpublished)

Community was created.

See your favorite metrics right here by getting the latest AppExchange package. [Install AppExchange Package](#)

Builder

Build, brand, and customize your community pages.

Moderation

Monitor posts and comments, create rules.

Content Management

Create, manage, and reuse content.

Gamification

Keep your community members engaged with recognition badges.

Dashboards

Examine the health of your community with reports and dashboards and

Administration

Configure settings and properties for your community.

Quick Links

[Community Pulse Metrics](#)

[Lightning Carousel and Banner Co](#)

[Trailblazer Community: Communit](#)

[Set Up and Manage Communities](#)

[AppExchange](#)

Expand Your Reach wit Communities

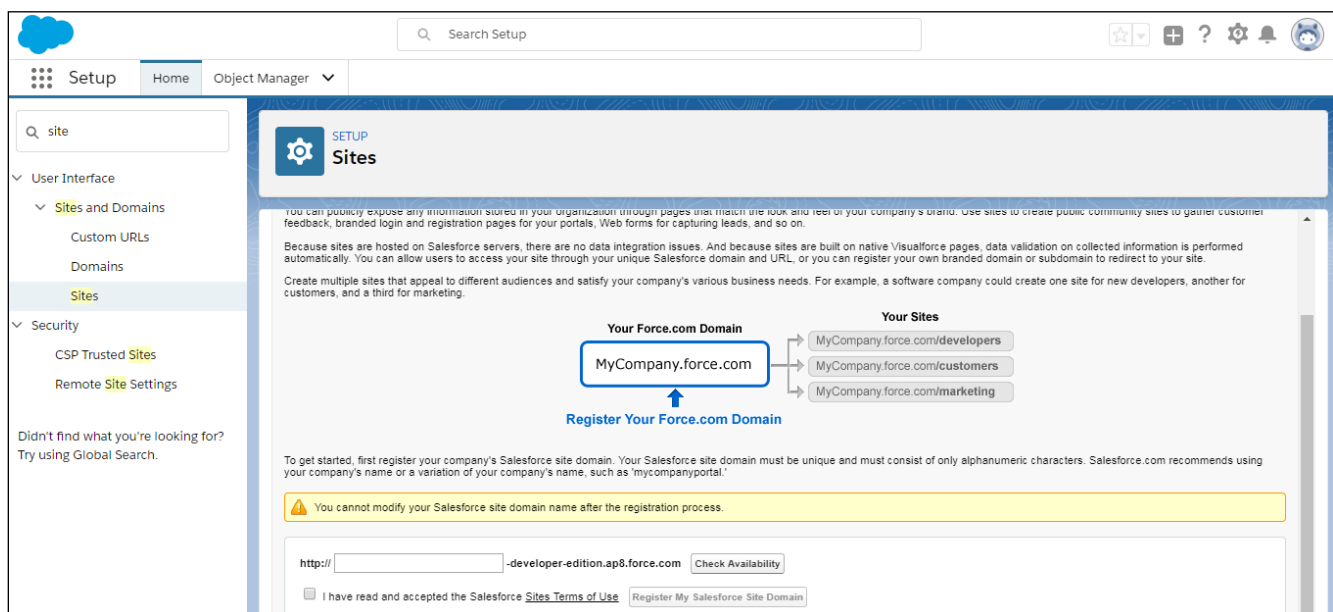
[START LEARNING >](#)

Infosys Customer Automotive Bolt

Work Instructions

Step	Instruction	Illustration	Expected Result
3	Setup Sites - Navigate to User Interface -> Sites and Domain -> Sites. - Register Salesforce Site Domain name if it is not existing	Please refer to Figure 10	Salesforce Site Domain is registered

Figure 10



Infosys Customer Automotive Bolt

Work Instructions

Step	Instruction	Illustration	Expected Result
4	Configure Site - Select Community Site Label which needs to be configured - Click on "Public Access Settings" button for site selected - Click on Edit and provide permission to objects and fields as per screenshot - Hover over "Enabled Visualforce Page Access" link and click Edit. Select infyilb1.Carsearchpage, infyilb1.ContactUs, infyilb1.Homepage and infyilb1.LocateDealer" Visualforce Pages and add. Save configuration.	Please refer to Figure 11 to 17	Site Guest Profile is configured

Figure 11

The screenshot displays the Salesforce Setup interface for managing Sites. At the top, the 'SETUP Sites' header is visible. Below it, explanatory text states that sites are hosted on Salesforce servers and can be accessed via a unique Salesforce domain or a branded domain. A diagram illustrates 'Your Force.com Domain' (MyCompany.force.com) with a green checkmark, pointing to 'Your Sites' which includes MyCompany.force.com/developers, MyCompany.force.com/customers, and MyCompany.force.com/marketing. A blue arrow points to a 'Create Your Force.com Sites' button. Below this, a text box shows the current Salesforce site domain name as infyilbtest-developer-edition.ap15.force.com, with a link to 'Salesforce Sites Terms and Conditions'. At the bottom, a table titled 'Sites (infyilbtest-developer-edition.ap15.force.com)' with a 'New' button lists existing sites. The table has columns for Action, Site Label, Site URL, Site Description, Active, Site Type, and Last Modified By. One site is listed with Site Label 'ILB (Community)', Site URL (redacted), Site Description (redacted), Active status checked, Site Type 'Community', and Last Modified By (redacted).

Infosys Customer Automotive Bolt

Work Instructions

Figure 12

The screenshot shows the 'Setup Sites' page for a site named 'ILB'. The page has a header with the 'SETUP Sites' logo. Below the header, there's a 'Site Details' section for 'ILB' with a 'Help for this Page' link. Navigation links include 'Back to List: Sites' and 'Back to List: Communities'. The main section is 'Site Detail' with tabs for 'Edit', 'Public Access Settings', and 'URL Redirects'. The 'Edit' tab is active, showing a table of site settings. The 'Site Label' is 'ILB' and the 'Site Name' is 'ILB'. The 'Active Site Home Page' is 'CommunitiesLanding [Preview]'. The 'Inactive Site Home Page' is empty. The 'Site Template' is empty. The 'Clickjack Protection Level' is 'Allow framing by the same origin only (Recommended)'. The 'Lightning Features for Guest Users' is checked. The 'Upgrade all requests to HTTPS' is checked. The 'Enable Browser Cross Site Scripting Protection' is checked. The 'Guest Access to the Support API' is unchecked. The 'Referrer URL Protection' is checked. The 'Self Registration Page' is 'CommunitiesSelfReg [Preview]'. The 'Change Password Page' is empty.

Site Label	ILB	Site Name	ILB
Site Contact		Active Site Home Page	CommunitiesLanding [Preview]
Site Favorite Icon		Inactive Site Home Page	
Site Robots.txt		Site Template	
URL Rewriter Class		Clickjack Protection Level	Allow framing by the same origin only (Recommended)
Require Secure Connections (HTTPS)	☒	Lightning Features for Guest Users	☒
Allow Access to Standard Salesforce Pages	☒	Upgrade all requests to HTTPS	☒
Enable Content Sniffing Protection	☒	Enable Browser Cross Site Scripting Protection	☒
Referrer URL Protection	☒	Guest Access to the Support API	☐
Self Registration Page	CommunitiesSelfReg [Preview]	Change Password Page	

Figure 13

The screenshot shows the 'Setup Profiles' page. The 'Standard Object Permissions' section is active, displaying a table of permissions for various objects. The table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The objects listed are Accounts, Account Brands, Assets, Campaigns, Cases, Contacts, Contracts, Documents, Ideas, Leads, Opportunities, Orders, Price Books, Products, Scorecard Associations, and Solutions. The permissions are as follows:

Object	Read	Create	Edit	Delete	View All	Modify All
Accounts	☐	☐				
Account Brands	☐					
Assets	☐	☐				
Campaigns	☐	☐				
Cases	☒	☒				
Contacts	☒	☒				
Contracts	☐	☐	☐	☐		
Documents	☐	☐				
Ideas	☐					
Leads	☒	☒				
Opportunities	☐	☐				
Orders	☐	☐	☐	☐		
Price Books	☒					
Products	☐					
Scorecard Associations	☐	☐	☐	☐	☐	
Solutions	☐	☐				

Figure 14

The screenshot shows the 'Setup Profiles' page for the 'ILB Profile'. The 'Profile' section is active, displaying the 'ILB Profile' name. Below the profile name, there's a description: 'Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.' and 'If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.' The 'Enabled Apex Class Access' section is active, showing a table of permissions. The table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The objects listed are ILB_Car_Inventory, ILB_Configurations, ILB_Customer_Cars, and ILB_Dealers. The permissions are as follows:

Object	Read	Create	Edit	Delete	View All	Modify All
ILB_Car_Inventory	☒	☐	☐	☐	☒	☐
ILB_Configurations	☒	☐	☐	☐	☒	☐
ILB_Customer_Cars	☐	☐	☐	☐	☐	☐
ILB_Dealers	☒	☐	☐	☐	☒	☐

Infosys Customer Automotive Bolt

Work Instructions

Figure 15

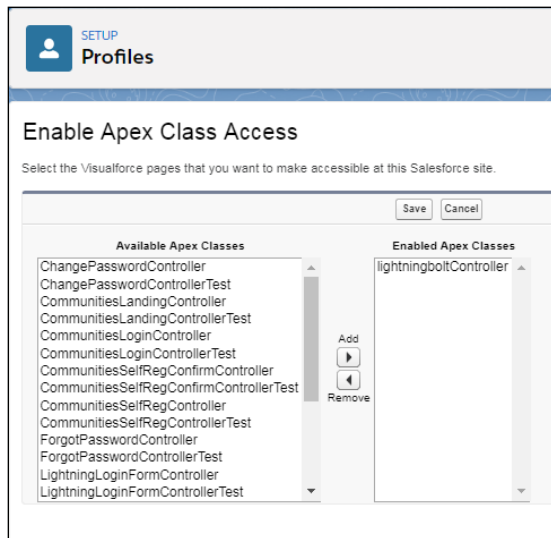


Figure 16

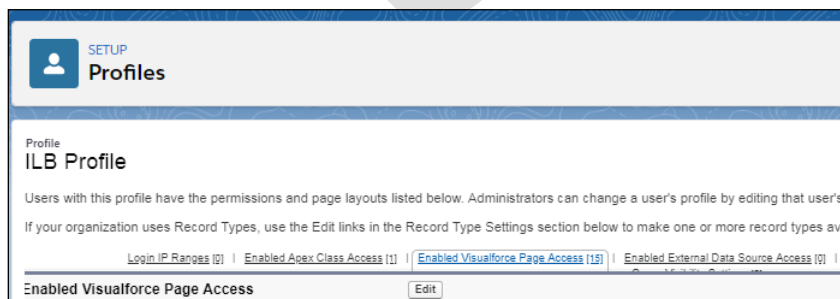
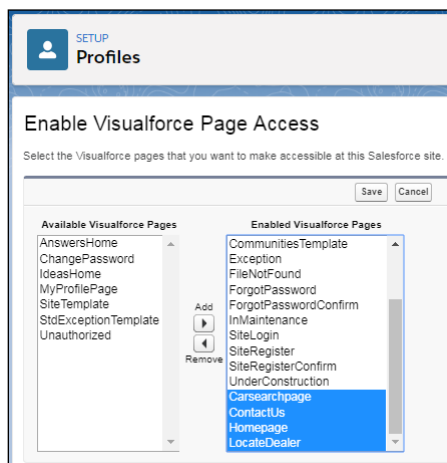


Figure 17



Infosys Customer Automotive Bolt

Work Instructions

Step	Instruction	Illustration	Expected Result
4	Configure Builder General Settings - Click "Builder" for the community to be configured in All Communities Setup - Select "Settings" in Builder and within General, enable checkbox "Public can access the community" and publish.	Please refer to Figure 18, 19	Builder General Settings is configured

Figure 18

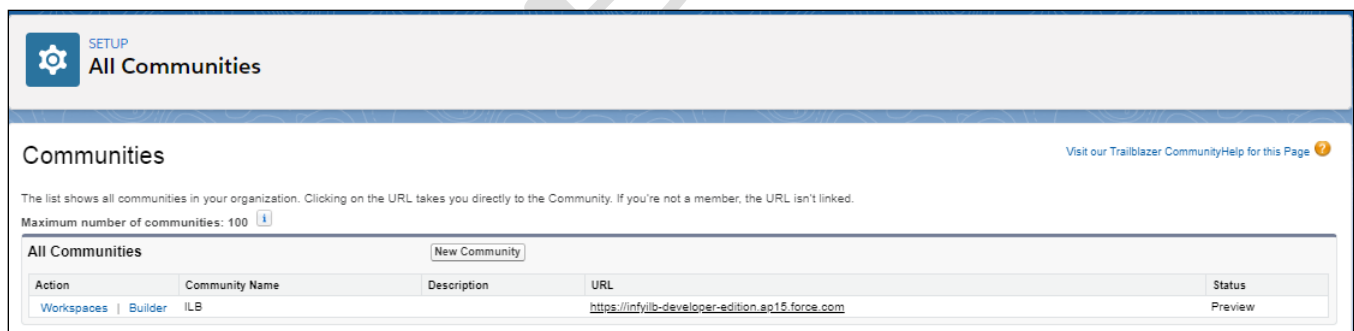
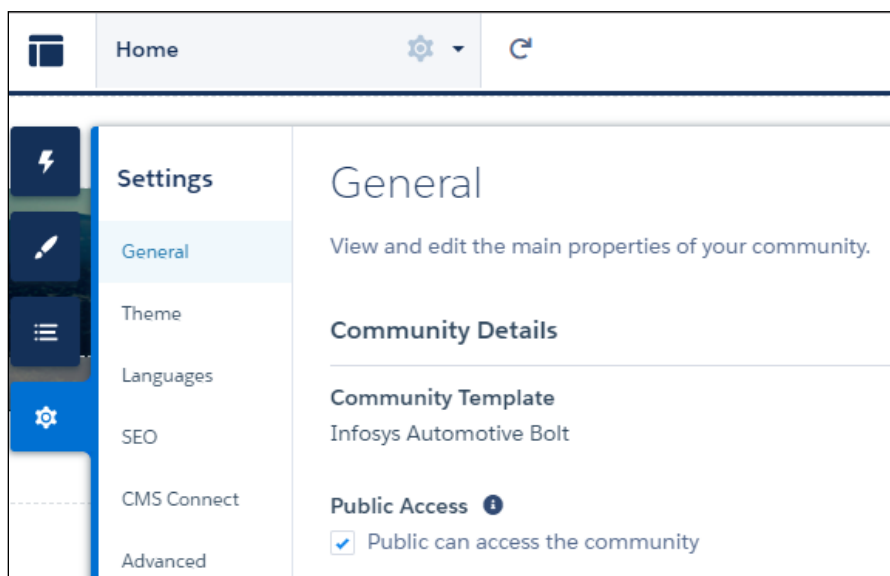


Figure 19



Infosys Customer Automotive Bolt

Work Instructions

Step	Instruction	Illustration	Expected Result
5	Configure Administration Setup • Create a custom Customer Community User profile to be assigned during self-registration by cloning Customer Community User profile and provide permission to custom objects. • Create an account for users to be assigned during self-registration. • Click “Workspaces” for the community to be configured in All Communities Setup • Select “Administration” • Select Preferences section and select checkbox Show all settings in Workspaces and provide required permissions. • Select Members section and for Customer Profile, add custom profile created earlier. • Select Tabs Section and Select Home tab to be included in community. • Select Login & Registration section. • Upload community logo in Branding Options. • Within Login Page Setup, select Login Page Type as “Visualforce Page” and Select “Homepage” from searcher. • Provide Logout Page URL • Within Registration Page Configuration, select checkbox Allow external users to self-register. Select Register Page in Community Builder page and provide custom profile and account created. Account is to be left blank if person accounts is to be used. • In Password Pages, select Forgot Password Community Builder page. • In Pages section, select “Default Pages” as Community Home	Please refer to Figure 20 to 28	• Community Administration is Configured

Infosys Customer Automotive Bolt

Work Instructions

Figure 20



SETUP

Profiles

Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
ILB_Car_Inventorys	☒	☐	☐	☐	☒	☐
ILB_Configurations	☒	☐	☐	☐	☒	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All 	Modify All 
ILB_Customer_Cars	☒	☒	☒	☒	☒	☒
ILB_Dealers	☒	☐	☐	☐	☒	☐

Figure 21



SETUP

All Communities

Communities

Visit our Trailblazer CommunityHelp for this Page

The list shows all communities in your organization. Clicking on the URL takes you directly to the Community. If you're not a member, the URL isn't linked.

Maximum number of communities: 100

All Communities

New Community

Action	Community Name	Description	URL	Status
Workspaces Builder	ILB		https://infyilb-developer-edition.ap15.force.com	Preview

Figure 22

Administration

ILB

Settings

Preferences

Members

Tabs

Branding

Login & Registration

Emails

Pages

Rich Publisher Apps

Preferences

General

- ☐ Show nicknames [i](#)
- ☒ Optimize images for mobile devices [i](#)
- ☐ Give access to public API requests on Chatter [i](#)
- ☐ Enable direct messages [i](#)
- ☐ Users can send and receive private messages [i](#)
- ☐ Allow discussion threads [i](#)
- ☐ Let guest users view asset files on public and login pages [i](#)
- ☒ See other members of this community [i](#)
- ☐ Gather Community 360 data [i](#)
- ☐ Use custom Visualforce error pages [i](#)
- ☒ Show all settings in Workspaces [i](#)

Community Management

- ☒ Allow members to flag content [i](#)
- ☒ Allow members to upvote and downvote [i](#)
- ☒ Enable setup and display of reputation levels [i](#)
- ☒ Exclude contributions to records when counting points toward reputation levels [i](#)
- ☒ Enable knowledgeable people on topics [i](#)
- ☒ Suggest topics in new community posts [i](#)
- ☒ Show number of people discussing suggested topics [i](#)

Infosys Customer Automotive Bolt

Work Instructions

Figure 23

The screenshot shows the 'Administration' page with the 'ILB' sub-tab selected. The left sidebar contains a menu with 'Settings', 'Preferences', 'Members', 'Tabs', 'Branding', 'Login & Registration', 'Emails', 'Pages', 'Reputation Levels', 'Reputation Points', and 'Rich Publisher Apps'. The 'Tabs' option is highlighted. The main content area is titled 'Tabs' and includes a description: 'Select the tabs to include in this community. These tabs show in communities using the Standard Tabs + Visualforce template and determine community navigation in the mobile app.' Below this is a blue information bar stating 'Standard sharing rules apply to all records. [Learn more.](#)'. The interface features two columns: 'Available Tabs' and 'Selected Tabs'. The 'Available Tabs' list includes: Account Brands, Accounts, App Launcher, Article Management, Assets, Badges, Badges Received, Campaigns, Cases, Channel Program Levels, Channel Programs, Coaching, Console, and Contact Requests. The 'Selected Tabs' list currently contains 'Home'. Between the columns are 'Add' and 'Remove' buttons. To the right of the 'Selected Tabs' column are 'Up' and 'Down' arrow buttons. At the bottom are 'Save' and 'Cancel' buttons.

Figure 24

The screenshot shows the 'Administration' page with the 'ILB' sub-tab selected. The left sidebar menu is the same as in Figure 23, but 'Members' is highlighted. The main content area is titled 'Members' and includes a description: 'All users with the selected profiles OR permission sets are members.' Below this is a blue information bar: 'When you add a profile or permission set, new members to a community will receive a welcome email message. If you want to prevent those community members from receiving welcome email messages, just deselect the option Send welcome email.' The 'Select Profiles' section has a search bar with a dropdown set to 'Customer' and a 'Find' button. Below are two columns: 'Available Profiles' and 'Selected Profiles'. The 'Available Profiles' list includes: Customer Community Login User, Customer Community Plus Login User, Customer Community Plus User, Customer Community User, External Identity User, and High Volume Customer Portal User. The 'Selected Profiles' list includes: System Administrator and ILB Customer Community User. Between the columns are 'Add' and 'Remove' buttons. The 'ILB Customer Community User' profile is highlighted in the 'Selected Profiles' list.

Figure 25

The screenshot shows the 'Administration' page with the 'ILB' sub-tab selected. The left sidebar menu is the same as in Figure 23, but 'Login & Registration' is highlighted. The main content area is titled 'Login Page Setup' and includes a description: 'Choose a login page type to create a branded login experience. Depending on the login page type, your users can log in with their username, email, phone number, or other user identifier. [Learn more](#)'. Below this is a 'Login Page Type' dropdown menu set to 'Visualforce Page' and a 'Homepage' text input field. A blue information icon is visible next to the dropdown menu.

Infosys Customer Automotive Bolt

Work Instructions

Figure 26

Administration ILB	
Settings	
Preferences	
Members	
Login & Registration	Login & Registration Brand, configure, and customize your community's login experience, which includes pages used to log in users, verify identities, reset passwords, register members, and for login flows. Tip: To view your login pages as you work, open the URL for your community using your browser's private browsing mode. Branding Options Customize your community's login experience to reflect your brand. You can use dynamic branding URLs to change how login and related pages appear at runtime. Learn about Dynamic Branding URLs Logo Type File Logo File Choose File No file chosen JPG, GIF or PNG, 100 KB max.  125 px max

Figure 27

Administration ILB	
Settings	
Preferences	
Members	
Tabs	
Branding	
Login & Registration	Logout Page URL Full URL https://ilbpartner.force.com/Homepage Password Pages Change how passwords are handled by selecting custom pages, if they are available. Forgot Password Community Builder Page Forgot Password Reset Password Default Page Registration Page Configuration ☒ Allow external users to self-register Choose a self-registration page to let users join your community. Registration Page Type Community Builder Page Register Assign users to a profile and account Profile ILB Customer Community User Account ILB Customer If you've enabled person accounts, leave the Account field empty.

Figure 28

Administration ILB	
Settings	
Preferences	
Members	
Tabs	
Branding	
Login & Registration	
Emails	
Pages	Pages Configure page assignments for your community. Use the default page or override it with a custom Visualforce or Community Builder page. Community Home Default Page Service Not Available Save Cancel Advanced Customizations

Infosys Customer Automotive Bolt

Work Instructions

Step	Instruction	Illustration	Expected Result
6	Theme configuration in Builder Provide Logo, Header Image and Login Pages Background Image as per business requirement	Please refer to Figures 29	Community Theme is configured
	FieldSet configuration in Registration Page In Builder, open Register page and configure “infyilb1__registration” value in extraFieldsFieldSet.	Please refer to Figures 30	Register Page is configured

Figure 29

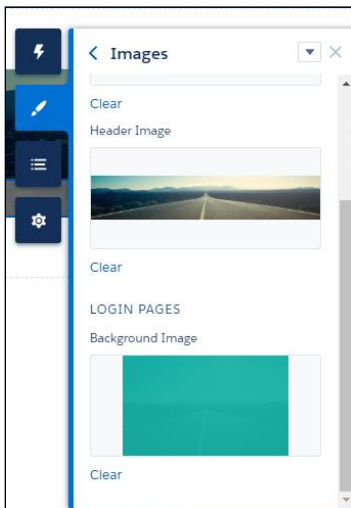
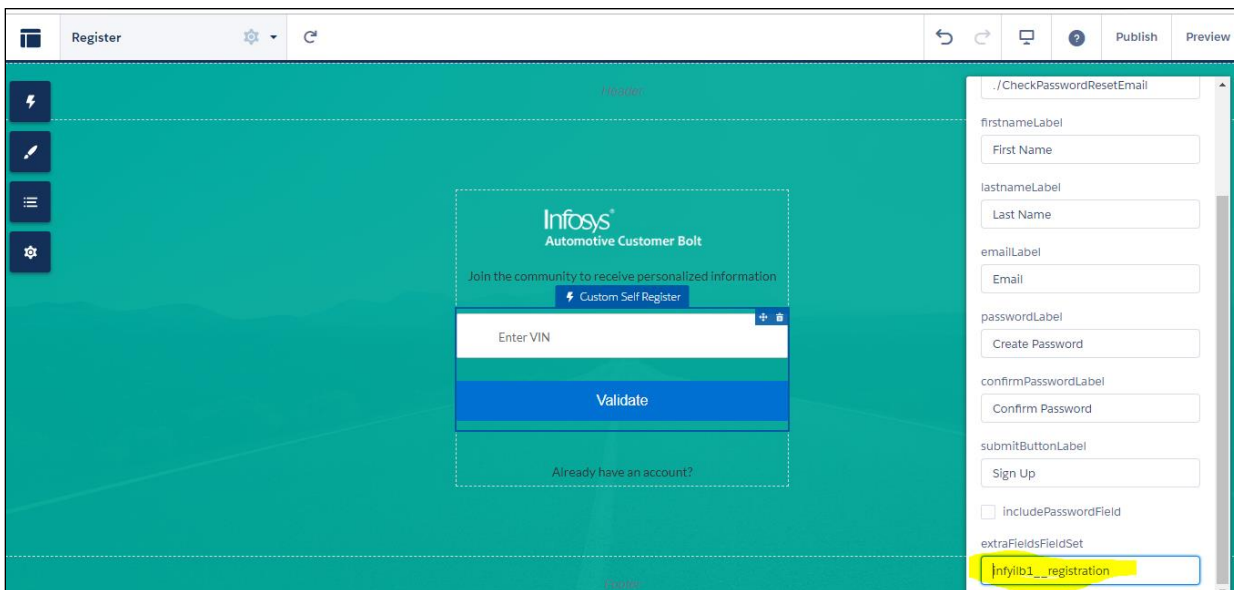


Figure 30



Infosys Customer Automotive Bolt

Work Instructions

Step	Instruction	Illustration	Expected Result
7	ILB_Configuration Custom Object - Navigate to ILB_Configurations tab within Infosys Automotive Customer Bolt App - Create a record for all configurable content on community - URL Configuration fields has to be inputted in below format	Please refer to Table 1	URL Configuration fields are inputted in right format

Table 1

S.No.	ILB_Configuration Object Fields	URL Format
1	Login URL	[Site URL]/s/login
2	Car Search URL	[Site URL]/infyilb1__Carsearchpage
3	Home URL	[Site URL]
4	Dealer Locator URL	[Site URL]/ infyilb1__LocateDealer
5	Contact Us URL	[Site URL]/ infyilb1__ContactUs

Example: https://infylightningboltsol-developer-edition.na59.force.com/ infyilb1__Carsearchpage

Step	Instruction	Illustration	Expected Result
8	ILB_Configuration Custom Object Home Page Content fields can have sample content as below	Please refer to Figure 31	Home Page Content fields are inputted

Figure 31

Home Page Content Home Page Content box 1 heading Mid Term Service @ 499 only Home Page Content box 2 heading Free Vehicle health check Home Page Content box 3 heading Best car dealers	Home Page Content Box1 Offer valid till 30th september 2018 only Hurry!Offer valid till 30th september 2018 only Hurry!Offer valid till 30th september 2018 only Hurry!Offer valid till 30th september 2018 only Hurry! Home Page Content Box2 Offer valid till 30th september 2018 only Hurry!Offer valid till 30th september 2018 only Hurry!Offer valid till 30th september 2018 only Hurry!Offer valid till 30th september 2018 only Hurry! Home Page Content Box3 Offer valid till 30th september 2018 only Hurry!Offer valid till 30th september 2018 only Hurry!Offer valid till 30th september 2018 only Hurry!Offer valid till 30th september 2018 only Hurry!
---	--

Step	Instruction	Illustration	Expected Result
9	ILB_Configuration Custom Object Contact US Page Content fields can have sample content as below	Please refer to Figure 32	Contact Us Page and Content fields are inputted

Infosys Customer Automotive Bolt

Work Instructions

Figure 32

▼ Contact US Page Content

Contact Us ⓘ

1800 203 7625

Email Address ⓘ

customer@abc.com

Address ⓘ

Customer relationship center
P.O Box no. 6243
Andheri East
Mumbai - 500049

Step	Instruction	Illustration	Expected Result
10	ILB_Configuration Custom Object Footer Links fields can have sample content as below	Please refer to Figure 33	Footer Links fields are inputted

Figure 33

▼ Footer Links

FacebookLink

<https://www.facebook.com/>

TwitterLink

<https://www.facebook.com/>

Step	Instruction	Illustration	Expected Result
11	Create Data in Custom Object - Disable General Settings in Salesforce Files “Files uploaded to the Attachments related list on records are uploaded as Salesforce Files, not as attachments”. - Create Records for ILB_Car_Inventory, ILB_Customer_Car and ILB_Dealers custom object. - Add attachment in related list for ILB_Car_Inventory and ILB_Customer_car custom object from classic view. Images uploaded from lightning view might not load in community.		Records for Custom Objects are created

Infosys Customer Automotive Bolt

Work Instructions

Step	Instruction	Illustration	Expected Result
12	Navigation Menu - Go to Builder and click and edit "Navigation Menu" - Add required Menu Item by "Add Menu Item" and save menu. - Publish Community - Go to "Administration" and activate communities from Settings	Please refer to Figure 34, 35	Navigation Menu is configured

Figure 34

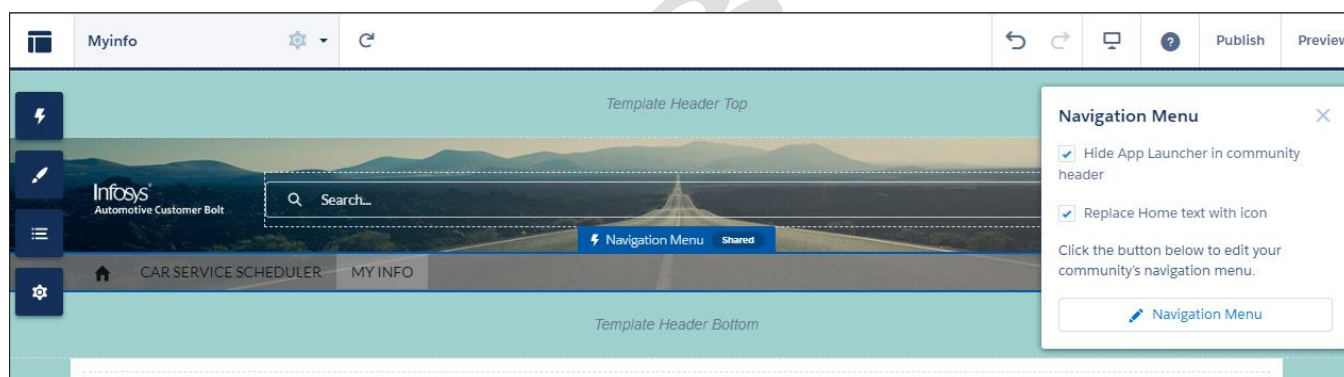
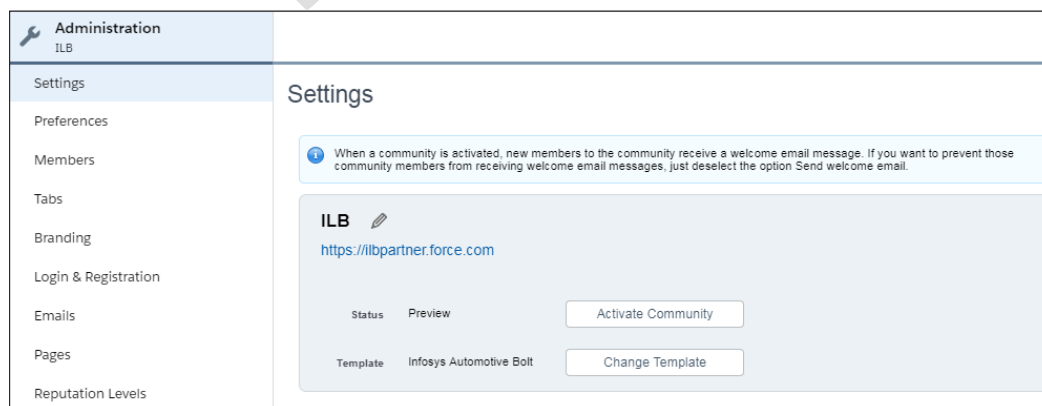


Figure 35



Infosys Customer Automotive Bolt

Work Instructions

Step	Instruction	Illustration	Expected Result
13	Workflow for Case Assignment - If business requirement, Case Queue and workflow rules can be created for case assignment to queue - Update the Sharing Settings in Setup for Case object to Private	Please refer to Figures 36 to 39	Cases created from community are assigned to a queue

Figure 36

The screenshot shows the 'Edit Queue' interface for 'ILB_Community_Case'. It includes a 'Queue Edit' section with 'Save' and 'Cancel' buttons. Below this is the 'Queue Name and Email Address' section, which contains fields for 'Label' (ILB_Community_Case), 'Queue Name' (ILB_Community_Case), and 'Queue Email'. There is also a checkbox for 'Send Email to Members'. The 'Supported Objects' section follows, with instructions to select objects for assignment. It features two lists: 'Available Objects' (Account Brand, Channel Program, Contact Request, Goal, ILB_Car, Inventory) and 'Selected Objects' (Case). An 'Add' button is located between the two lists.

Figure 37

The screenshot shows the 'All Workflow Rules' interface. It includes a 'Help for this Page' link and a 'Quick Tips' section with a link to 'Operators & Functions'. The main content area provides instructions on configuring workflow rules and lists three criteria: criteria that cause the workflow rule to run, immediate actions that execute when a record matches the criteria, and time-dependent actions that execute according to time triggers. Below this is a 'View' section with a dropdown menu set to 'All Workflow Rules' and a 'Create New View' link. A navigation bar with letters A-Z and 'Other' is present. The main table lists workflow rules with columns for 'Action', 'Rule Name', 'Description', 'Object', and 'Active'. The first rule is 'ILB_Assignment_Queue' with the description 'Auto Assignment of case from ILB Community to Queue', object 'Case', and is active (checked).

Infosys Customer Automotive Bolt

Work Instructions

Figure 38

Workflow Rule
ILB_Assignment_Queue
[Back to List: Workflow Rules](#) [Help for this Page](#)

Workflow Rule Detail [Edit](#) [Clone](#) [Deactivate](#)

Rule Name	ILB_Assignment_Queue	Object	Case
Active	☒	Evaluation Criteria	Evaluate the rule when a record is created
Description	Auto Assignment of case from ILB Community to Queue		
Rule Criteria	Current User: User Type EQUALS Customer Portal User, Customer Portal Manager, Guest, High Volume Portal		
Created By		Modified By	

Workflow Actions [Edit](#)

Immediate Workflow Actions

Type	Description
Field Update	ILB_Queue_Assignment

Time-Dependent Workflow Actions [See an example](#)

Figure 39

Setup Home Object Manager

Q shar

Security

Sharing Settings

Didn't find what you're looking for?
Try using Global Search.

Sharing Settings

time depending on the amount of data in your organization. Setting an object to Private makes records visible to record owners and those above them in the role hierarchy, and access can be extended using sharing rules.

[Save](#) [Cancel](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Public Read/Write/Transfer	☒
Account and Contract	Public Read/Write	Public Read/Write	☒
Order	Controlled by Parent	Controlled by Parent	☒
Contact	Controlled by Parent	Controlled by Parent	☒
Asset	Controlled by Parent	Controlled by Parent	☒
Opportunity	Public Read Only	Public Read Only	☒
Case	Private	Public Read/Write/Transfer	☒

Infosys Customer Automotive Bolt

Work Instructions

Step	Instruction	Illustration	Expected Result
15	Community usage flow - Use the Community URL to start navigation from Home Page - Use Car Search Menu to search for a car - For the selected car, click on test drive button to create a lead in sales cloud for sales team to follow up - Look up for dealer using the Locate a Dealer menu option - Either use Find you nearest dealer option or search dealer by city. All dealer as per search would show up on map with requisite details - Use Contact Us Menu to get contact details of organization - Use Login Menu for registering as community new user or to access content as an existing user - For new user, click on "Not a member" and register after providing a valid VIN number. VIN records were created for custom object ILB_Customer_Car in step 11. After successful registration customer field of custom object is upadted with new user and all car details are assigned to him. - For the logged in user, functionalities like raise car service request, update profile details, raise service case, add or delete car along with my info and my tools are available.	Please refer to Figures 40 to 55	Community functionalities are working as per requirement.

Figure 40

The screenshot displays the Salesforce 'All Communities' setup page. On the left, a sidebar contains a search bar and a navigation menu with options like 'Feature Settings', 'Communities', 'All Communities', 'Communities Settings', 'Lightning Community Pages', 'Lightning Community Templates', and 'Lightning Community Themes'. The main content area is titled 'All Communities' and includes a 'New Community' button. Below this is a table listing existing communities. The table has columns for 'Action', 'Community Name', 'Description', 'URL', and 'Status'. One community is listed: 'Workspaces | Builder' with the URL 'https://ilbpartner.force.com' and a status of 'Active'.

Action	Community Name	Description	URL	Status
Workspaces Builder	ILB		https://ilbpartner.force.com	Active

Infosys Customer Automotive Bolt

Work Instructions

Figure 41

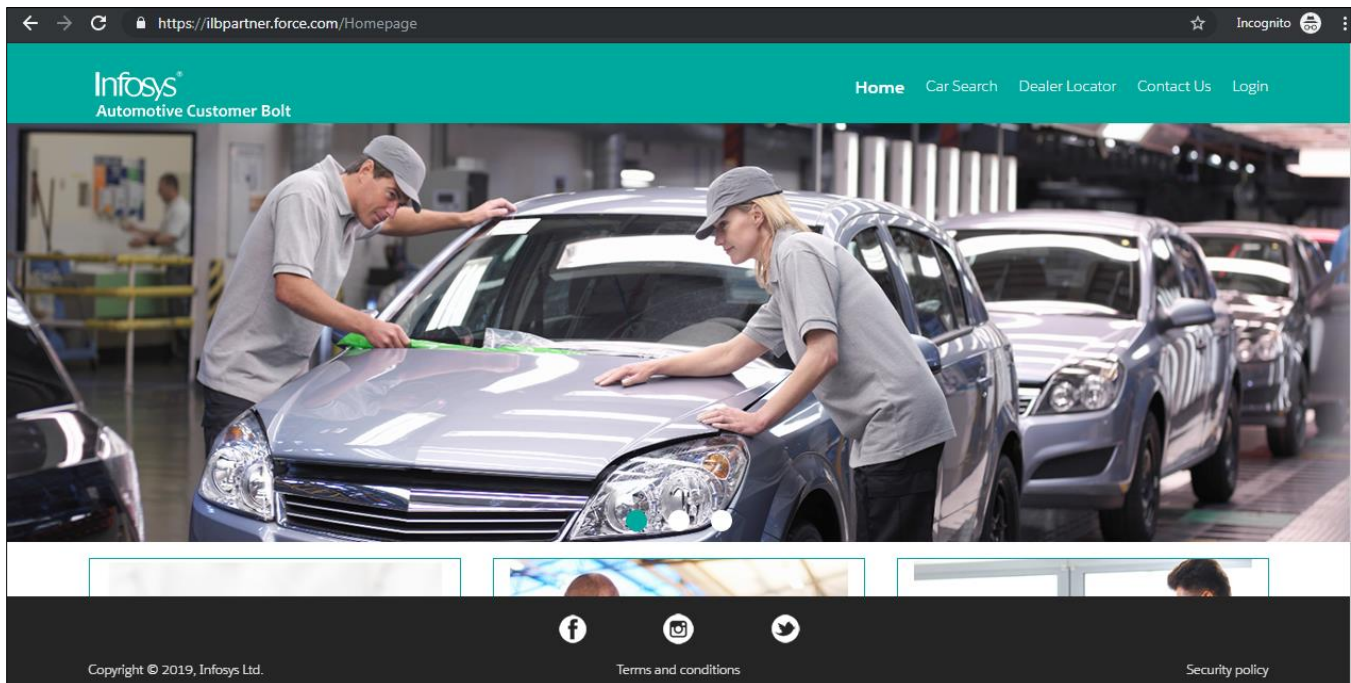
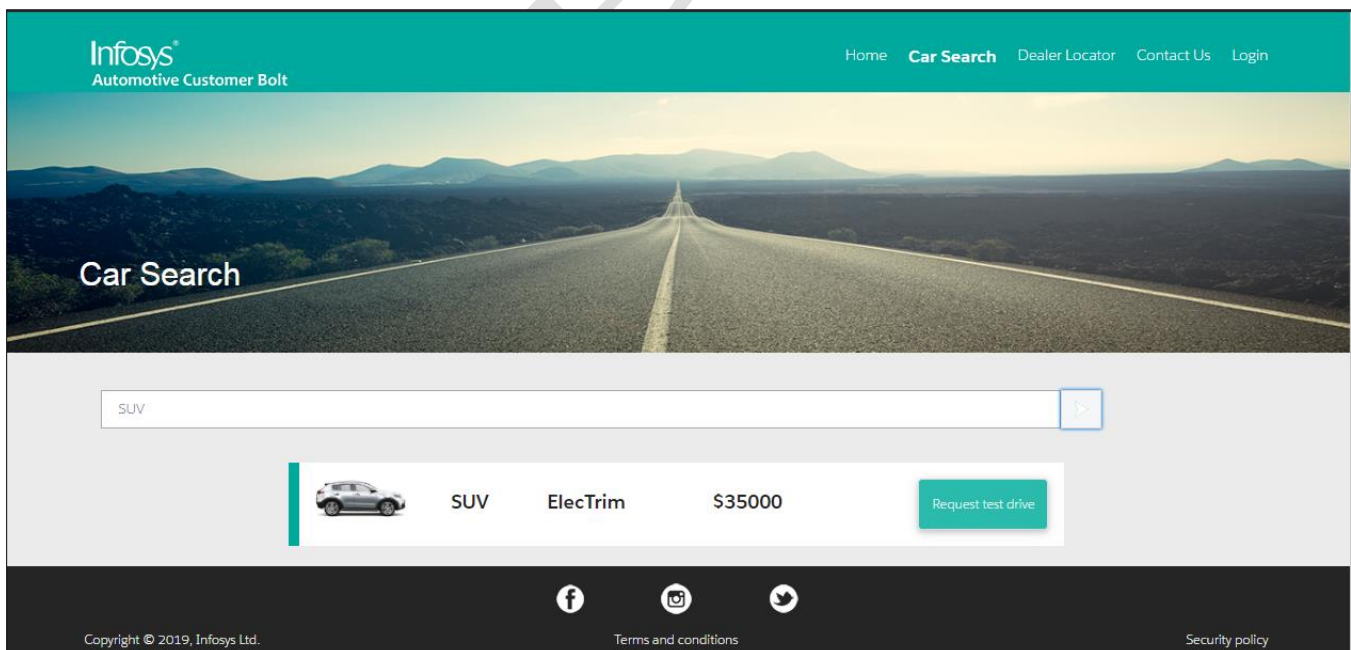


Figure 42



Infosys Customer Automotive Bolt

Work Instructions

Figure 43

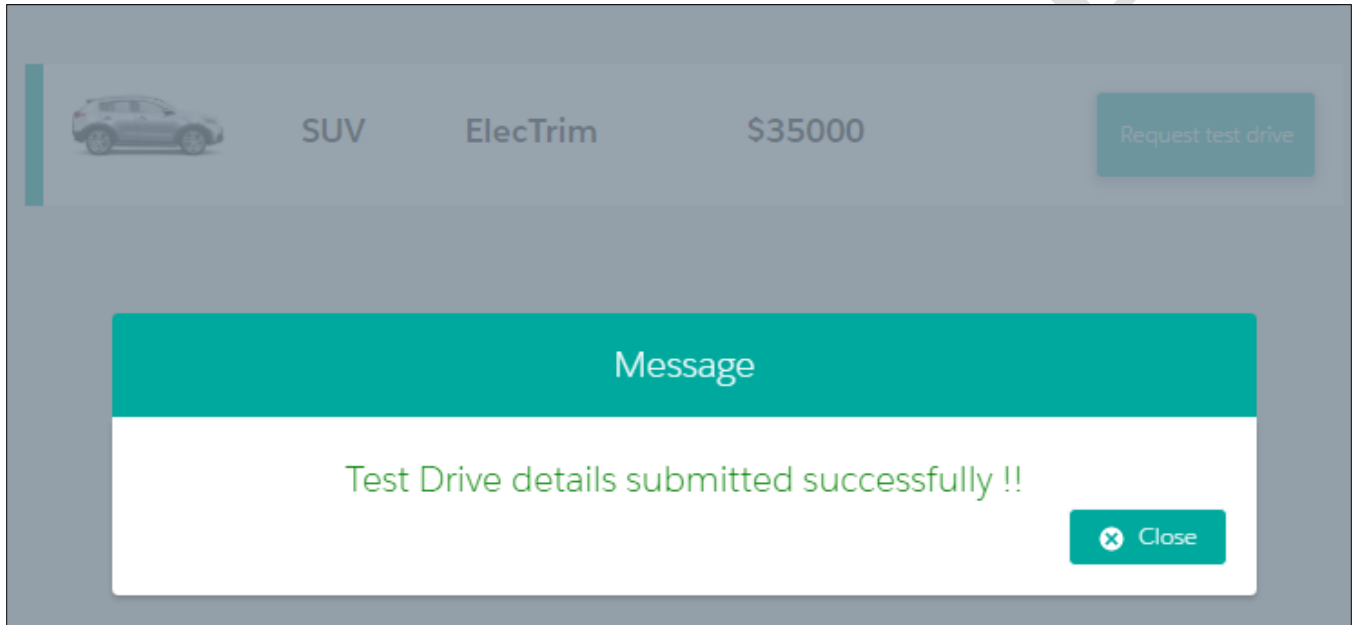
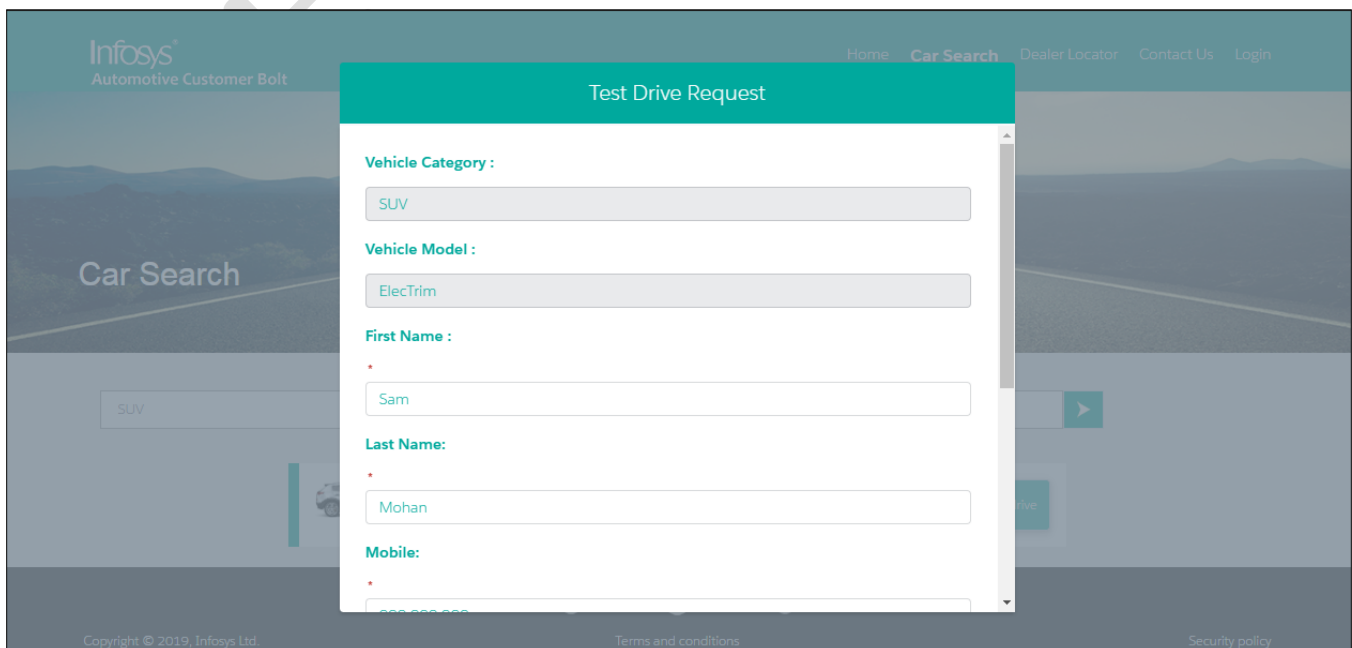


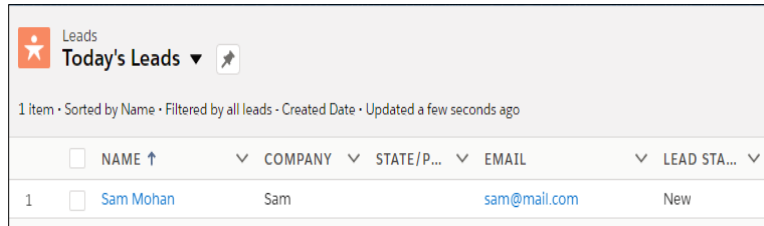
Figure 44



Infosys Customer Automotive Bolt

Work Instructions

Figure 45



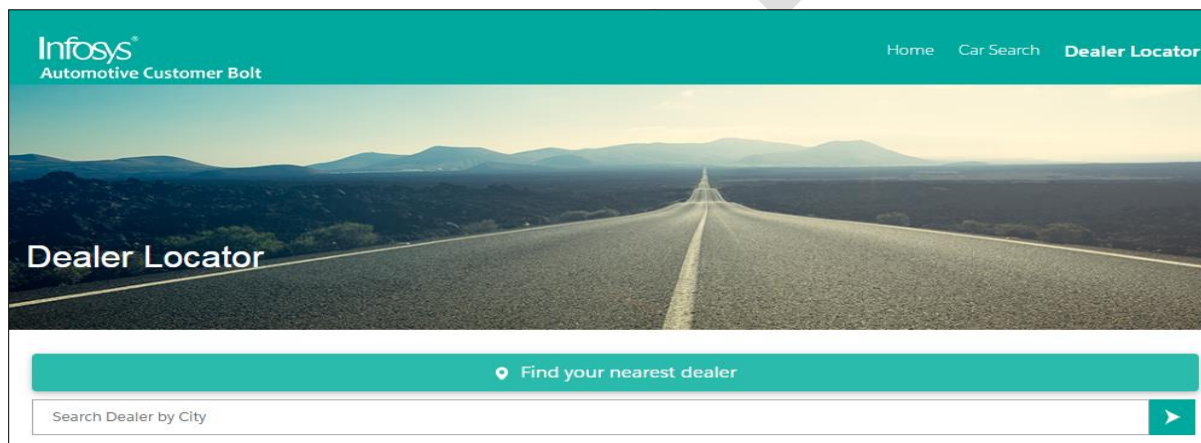
Leads

Today's Leads ▾

1 item • Sorted by Name • Filtered by all leads • Created Date • Updated a few seconds ago

	NAME ↑	COMPANY	STATE/P...	EMAIL	LEAD STA...
1	Sam Mohan	Sam		sam@mail.com	New

Figure 46



Infosys Automotive Customer Bolt

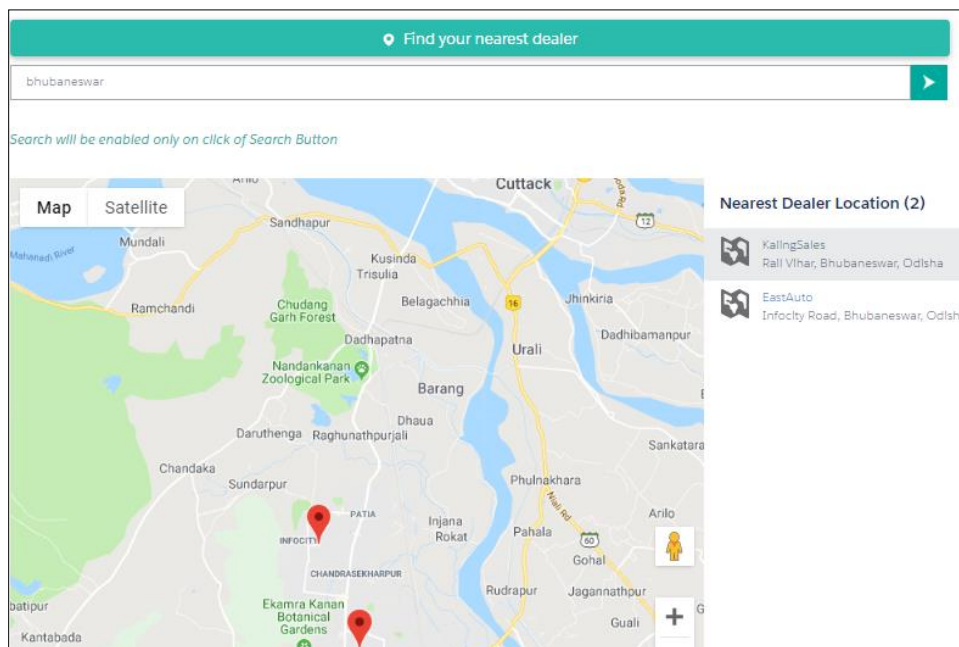
Home Car Search Dealer Locator

Dealer Locator

Find your nearest dealer

Search Dealer by City

Figure 47



Find your nearest dealer

bhubaneswar

Search will be enabled only on click of Search Button

Map Satellite

Nearest Dealer Location (2)

- KalingSales
Rali Vihar, Bhubaneswar, Odisha
- EastAuto
Infocity Road, Bhubaneswar, Odisha

Infosys Customer Automotive Bolt

Work Instructions

Figure 48

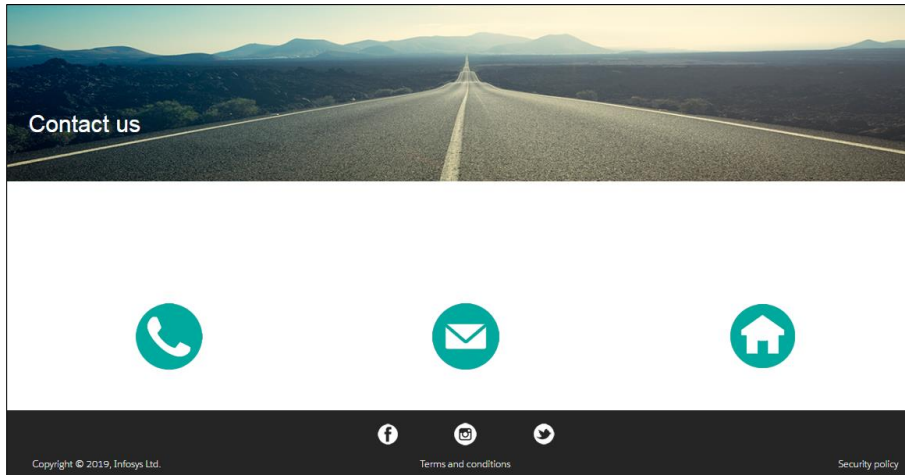


Figure 49

Infosys Automotive Customer Bolt

Email

Password

Log in

Forgot your password? Not a member?

Are you an employee? Login here

Figure 50

Infosys Automotive Customer Bolt

Join the community to receive personalized information and customer support.

Enter VIN

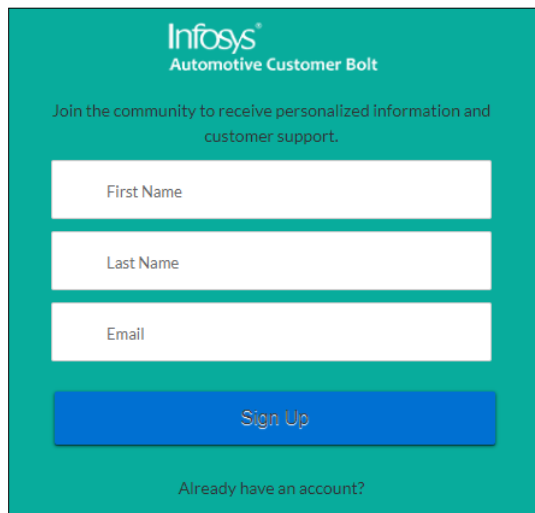
Validate

Already have an account?

Infosys Customer Automotive Bolt

Work Instructions

Figure 51



The sign-up form has a teal header with the Infosys logo and title. Below the header, a message invites users to join the community. The form contains three input fields for 'First Name', 'Last Name', and 'Email', followed by a blue 'Sign Up' button. At the bottom, there is a link for users who already have an account.

Infosys[®]
Automotive Customer Bolt

Join the community to receive personalized information and customer support.

First Name

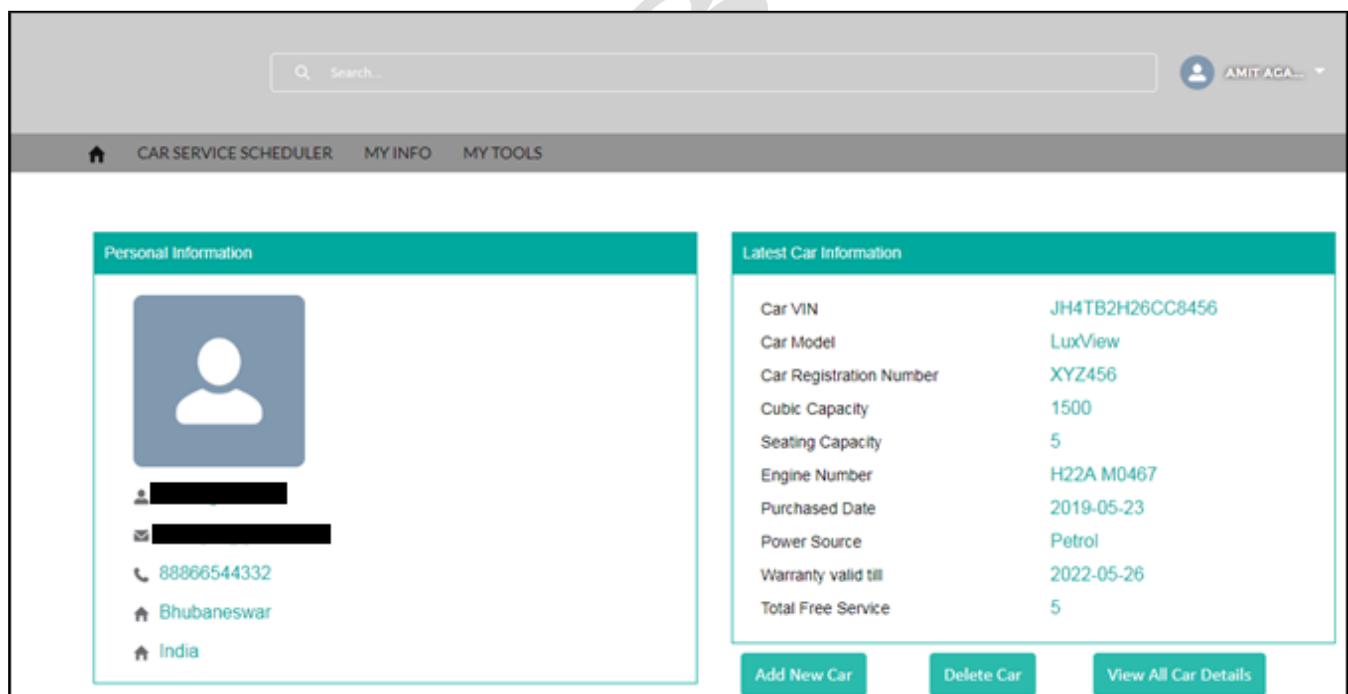
Last Name

Email

Sign Up

Already have an account?

Figure 52



The dashboard features a grey top navigation bar with a search bar and a user profile dropdown. Below this is a dark grey menu bar with links to 'CAR SERVICE SCHEDULER', 'MY INFO', and 'MY TOOLS'. The main content area is divided into two columns. The left column, titled 'Personal Information', displays a user profile card with a placeholder image, a name, an email address, a phone number (88866544332), and location details (Bhubaneswar, India). The right column, titled 'Latest Car Information', shows a table of car details. At the bottom of the right column are three buttons: 'Add New Car', 'Delete Car', and 'View All Car Details'.

Search...

AMIT AGA...

CAR SERVICE SCHEDULER MY INFO MY TOOLS

Personal Information

Latest Car Information

Car VIN	JH4TB2H26CC8456
Car Model	LuxView
Car Registration Number	XYZ456
Cubic Capacity	1500
Seating Capacity	5
Engine Number	H22A M0467
Purchased Date	2019-05-23
Power Source	Petrol
Warranty valid till	2022-05-26
Total Free Service	5

Add New Car Delete Car View All Car Details

Infosys Customer Automotive Bolt

Work Instructions

Figure 53

Search...

AMIT AGA...

CAR SERVICE SCHEDULER MY INFO MY TOOLS

bhubaneswar

KalingSales Bhubaneswar [Phone Icon] [Redacted] Raise Service Request

EastAuto Bhubaneswar [Phone Icon] [Redacted] Raise Service Request

Figure 54

Raise Service Request

Name :Allen Smith Email :allensimth.sfdc@gmail.com

Mobile :9966332255 Dealer Name :AutoZone

* Car

--Select Your Car--

Comments

* Servicing Date and Time

Submit Close

Figure 55

Message

Car Service Request submitted successfully

Close

Infosys Customer Automotive Bolt

Work Instructions

Common Troubleshooting Tips

Issue 1

Getting error "An internal server error has occurred Error ID: 743581732-9895 (1847284196)"

Resolution:

This error can come if there are more than one site URL and Site Guest User may not have access for custom object. In this scenario, provide access of custom object to Site Profile as mentioned in step 4, to other root community URL as well.

Issue 2

Getting error

"Themes(communityThemeDefinitions/Infosys_Automotive_Cust_Bolt.communityThemeDefinition) Missing feature Installing this package requires the following feature and its associated permissions: Lightning Community Themes"

Resolution:

This error comes if community is not enabled for the Salesforce org. Enable the community as mentioned in pre-requisite.

Issue 3

Getting error "(Infosys_Automotive_Cust_Bolt_Article_Detail) Validation Errors While Saving Record(s) There were custom validation error(s) encountered while saving the affected record(s). The first validation error encountered was "The object type you specified CaseArticle is invalid."

Resolution:

This error comes if Knowledge is not enabled for the user. Enable the knowledge as mentioned in pre-requisite.