



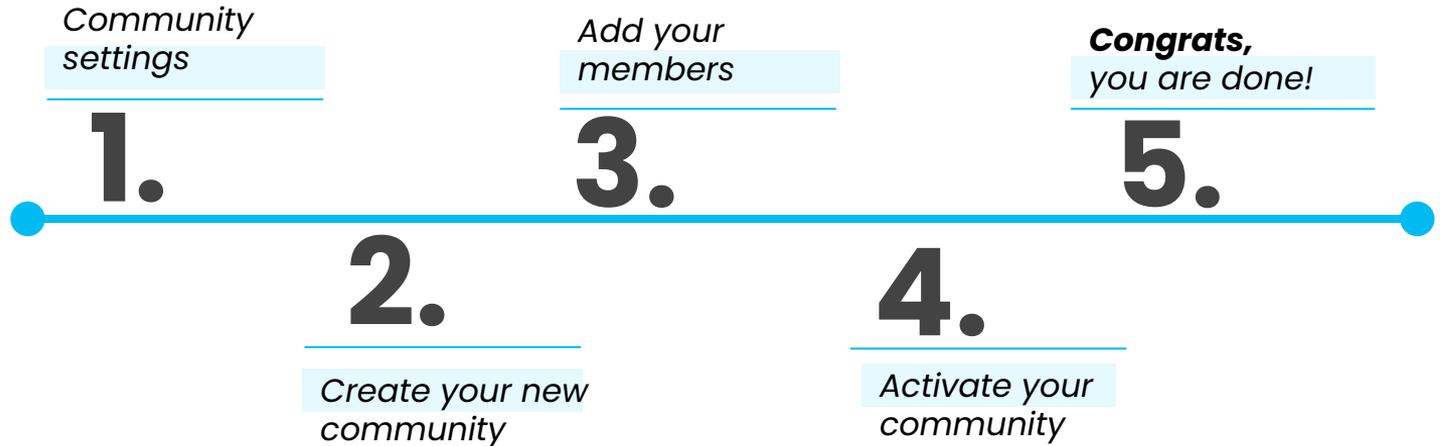
How to create a Salesforce community & add users

Create your own community for Tok and add members in 5 simple steps.

VersionTok / 1.185.0



This is our easy 5 step process:

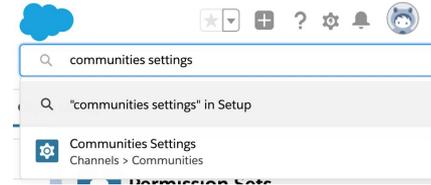




1. Community settings

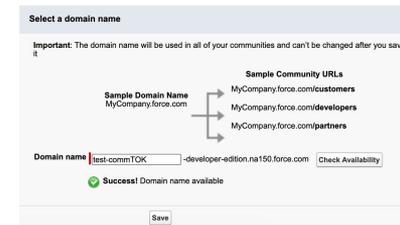
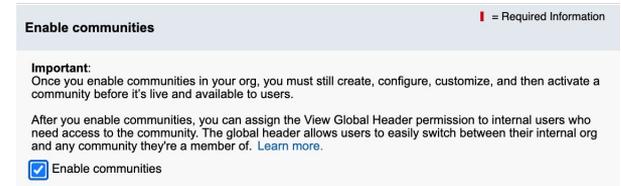
a.

- Go to **Setup** and search for **Communities Settings** using the Quick Search tool in your Salesforce org.



b.

- Click the checkbox for **Enable Communities** in the first section.
- Scroll to the bottom and fill in the **Domain Name** section. Click **Save**.



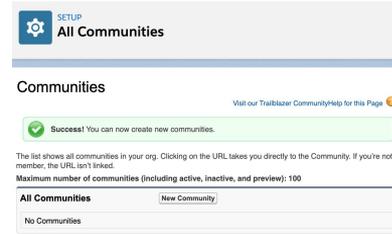


2. Create your community



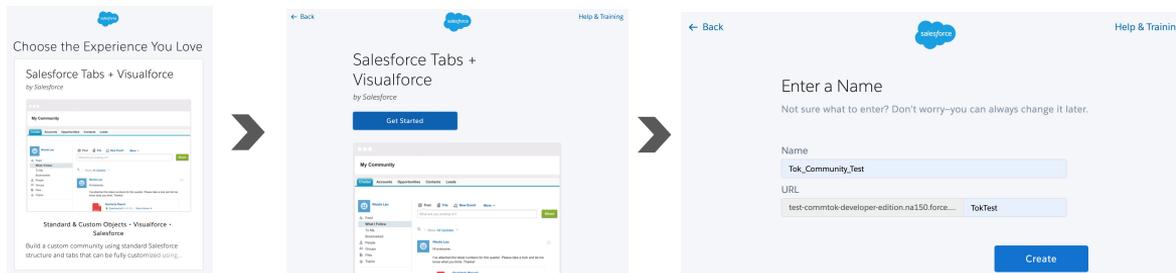
a.

- You are now ready to create your new community. Once you are redirected to **All communities** (if not, you can access it from **Setup**), click **New Community**.



b.

- Here you can choose your template/design. For Tok, we recommend the Salesforce Tabs + VisualForce Template, but feel free to select the one that fits your needs. This is your path: **Select template > Get started > Type name + URL > Create.**



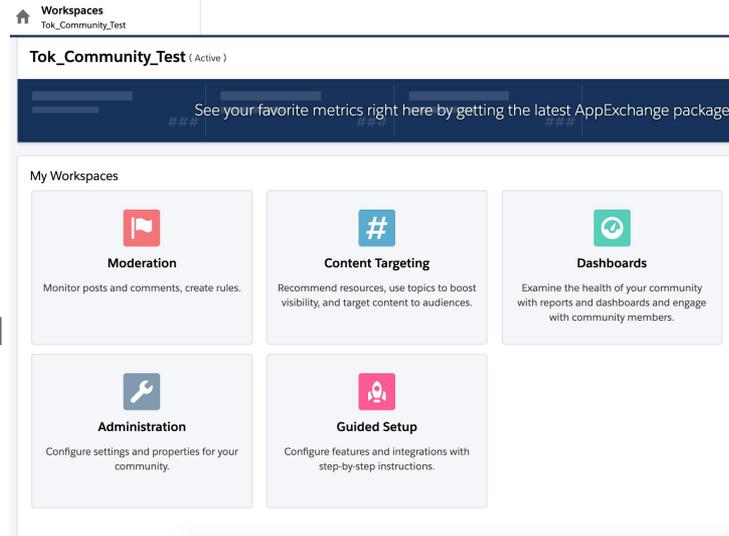
2.



C.

Now it's time to set up preferences for your new community.

- Click **Workspaces** for your new community on the All Communities screen.
- Then click the box named **Administration**.
- This will open the Administration screen. Click the **Preferences** tab on the left.



2.

d.

You will see a list of preferences. Enable these two options (you can use the defaults for the others):

1. Enable Direct Messages
 2. See others members of this community
- Click **Save**.

Preferences

General

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

Note:

If the "Show nicknames" box is selected by default, we highly recommend to untick it.

Note:

If you do not see all options displayed in the image above, first, select the "Show all settings in Workspaces," click Save and then you will be able to see the remaining options.

2.



3. Add your members



a.

Now it's time to add people. Click **Members** in the **Administration** section



You will see four boxes. Here is what you need to do:

1. Change profile search to **All**
2. Select **Customer Community User** and **System Administrator** in the *Available Profiles* box (left).
3. Click **Add** to move them to the *Selected Profiles* box (right).
4. **Save.**

*You will see an example of this on the next page.

3.



b.

Administration Tok

Settings

Preferences

Members

Contributors

Tabs

Branding

Login & Registration

Emails

Pages

Reputation Levels

Reputation Points

Rich Publisher Apps

Members

All users with the selected profiles **OR** permission sets are members.

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.

Select Profiles

Search: Internal for: Find

Available Profiles

Analytics Cloud Integration User
Analytics Cloud Security User
Chatter Free User
Chatter Moderator User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Force.com - App Subscription User
Force.com - Free User
Identity User
Marketing User
Partner App Subscription User

Add
Remove

Selected Profiles

System Administrator
Customer Community User

3a.
Profiles

Select Permission Sets

Find

Available Permission Sets

TokAdmin
TokBotServicesTab

Add
Remove

Selected Permission Sets

TokPermission
TokPermission2

3b.
Permissions

3.

tok



C.

Return to Administration, scroll down, and select **Tabs**. Here you will see two boxes. Move Tok from *Available Tabs* to *Selected Tabs*. Then click **Save**.

Administration
Tok

Settings
Preferences
Members
Contributors
Tabs
Branding
Login & Registration
Emails
Pages
Reputation Levels
Reputation Points
Rich Publisher Apps

Tabs

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.

Standard sharing rules apply to all records. [Learn more.](#)

Available Tabs	Selected Tabs
Account Brands Accounts Analytics App Launcher Assets Authorization Form Authorization Form Consent Authorization Form Data Use Authorization Form Text Campaigns Cases Channel Program Levels Channel Programs Coaching	Chatter Tok

Add
Remove
Up
Down

Save Cancel

Note: This step is only necessary if the community is using the “Salesforce Tabs + Visualforce” template.



3.



4. Activate your community



a.

Make sure you community is active.

Salesforce Tabs + Visualforce and Lightning Templates

Under the Administration button, select the **Settings** option and click on the **Activate Community** button. Click "Ok" when the alert appears.

*This is
what
you will
see*

The screenshot shows the Salesforce Administration interface. On the left is a navigation menu with 'Administration' selected, and 'Settings' is highlighted. The main content area is titled 'Settings' and contains a warning message about welcome emails. Below that, the 'Tok' community settings are displayed, including its URL and a table with 'Status' and 'Preview' columns. A red box highlights the 'Activate Community' button in the 'Preview' column. There is also a 'Change Template' button.

Note:

If not using Salesforce tab + Visualforce template, we recommend when adding Tok menu item, you configure to access a new browser tab.

4.

b.

For Lightning templates ONLY: If not using *Salesforce tab + Visualforce* template, there is a couple of steps you need to follow.

- a. Activate the community (Previous step - 4a).
- b. Go to **Setup**, search for **“all communities”** and click **Builder** next to your community to personalize your own community template.

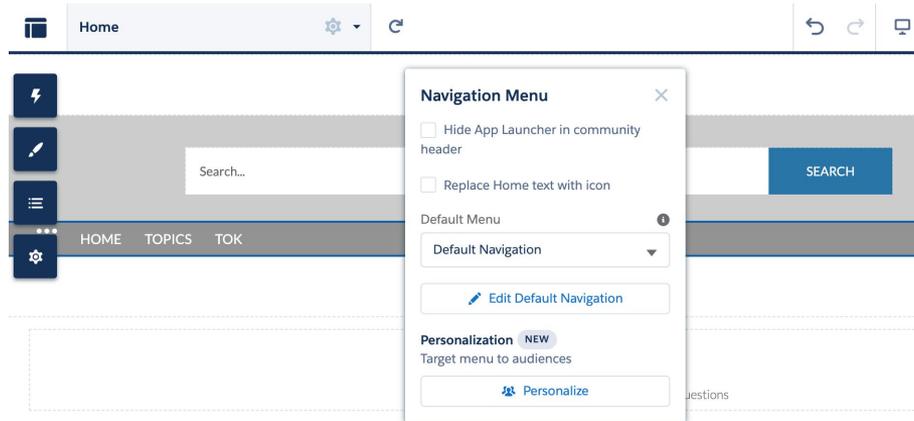
Action	Community Name	Description	URL
Workspaces Builder	Tok_Community_Test		https://test-commtok-developer-edition.na150.force.com

4.

b.

c.

You'll be prompted to your community.
Click on the **Navigation Menu** and a dialog box will appear.
Click **Edit Default Navigation**.

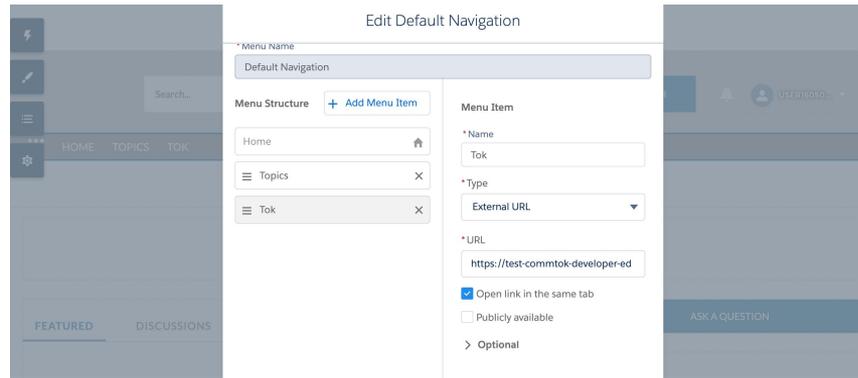


4.

b.

d. Click on **Add Menu Item** and fill the gaps:

- Name: Tok
- Type: External URL
- URL*: <https://communityurl>/apex/oktana_desktop__tokPage
- Check the **Open link in the same tab** box.
- Then **Save**.



***Note:**

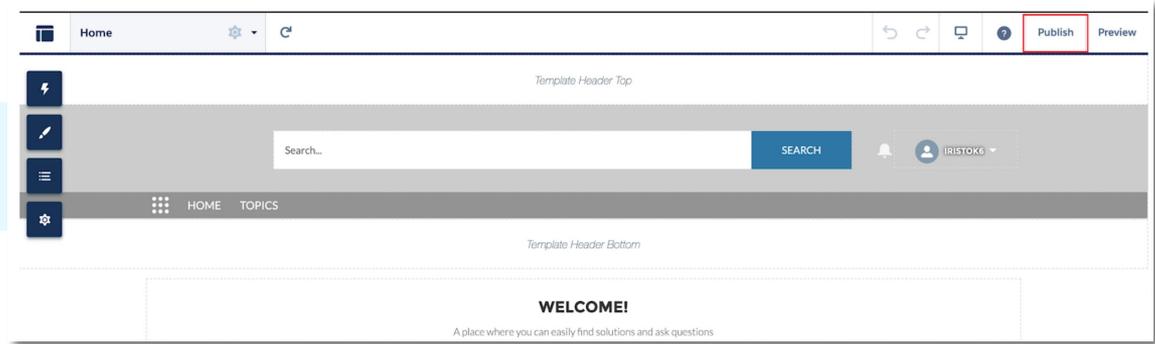
The <https://communityurl> URL is located in the "All communities" page.

4.

C.

For either template, click the **Publish** button in the top right corner.

*Click
"Publish"
in the
upper
corner*



4.



5. Congratulations!

Now you can enjoy real-time chat in your company.

tok

Thanks for using Tok!

If you need any support or are looking for extra information, please contact us. We are always happy to help.

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