



Add New Community inside Salesforce Lightning

# Step: 01

## Welcome to MyGuide

In this Guide we will learn how to add New Community inside Salesforce Lightning

The screenshot displays the Salesforce Lightning dashboard. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below the navigation bar, the dashboard is divided into several sections:

- Quarterly Performance:** A line chart showing sales performance from January to March. The chart includes a goal line and a legend for 'Closed', 'Goal', and 'Closed + Open (>70%)'. A tooltip titled 'Welcome to MyGuide' is overlaid on the chart, containing the text: 'In this Guide we will learn how to add New Community inside Salesforce Lightning'.
- Assistant:** A panel on the right side of the dashboard listing recent activities and alerts, such as 'New lead assigned to you today' and 'Opportunity is overdue'.
- Today's Events:** A section on the bottom left with a decorative graphic.
- Today's Tasks:** A section on the bottom right with a decorative graphic and the text 'Nothing due today. Be a go-getter, and check back soon.'

## Step: 02

Click the gear cog icon

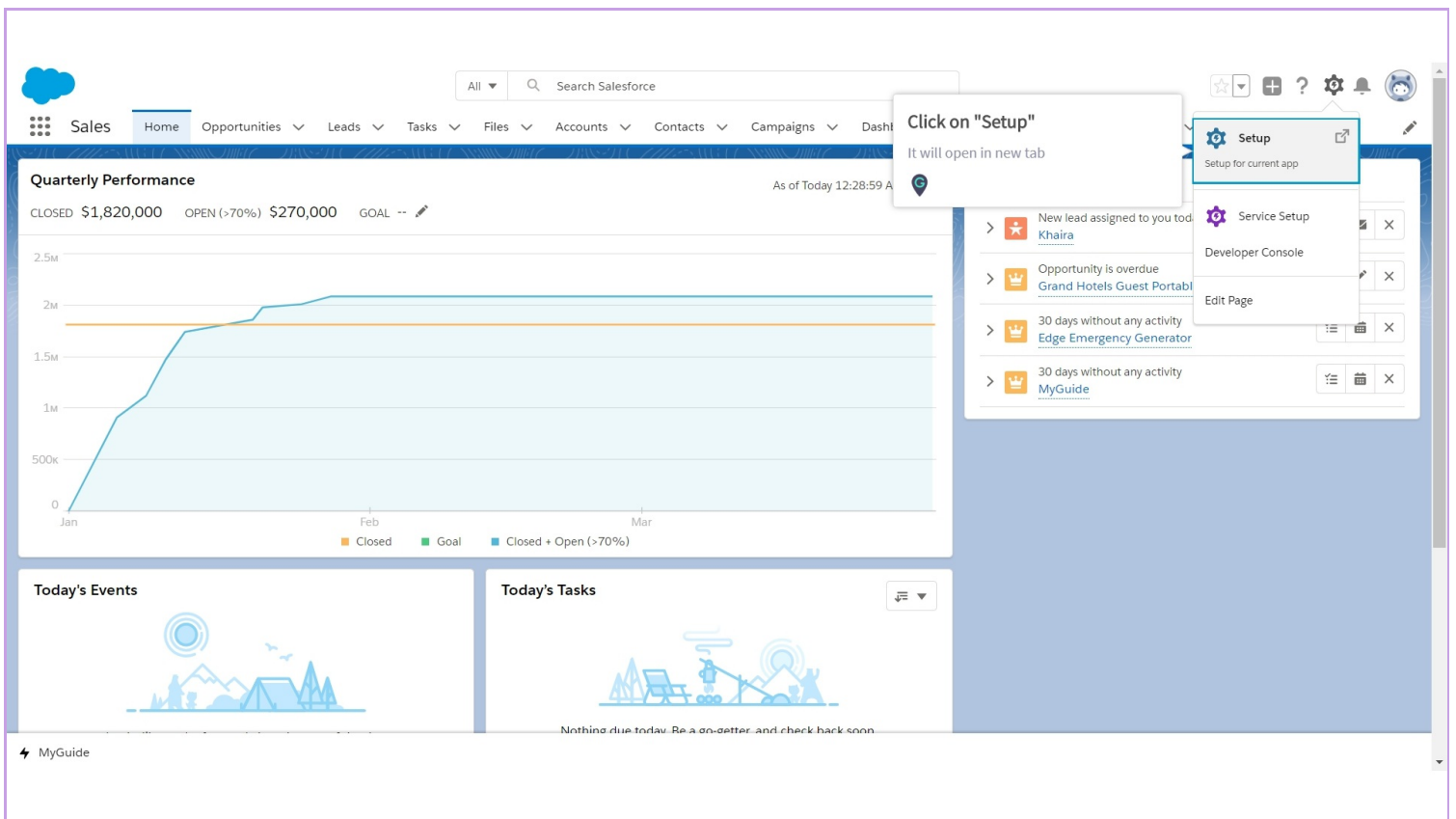
The screenshot shows the Salesforce MyGuide dashboard. At the top, there is a navigation bar with the Salesforce logo, a search bar, and a menu with options like Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, and Reports. A callout box with the text "Click the gear cog icon" points to the gear icon in the top right corner of the dashboard. Below the navigation bar, the main content area is divided into several sections:

- Quarterly Performance:** A line chart showing performance from January to March 2019. The y-axis ranges from 0 to 2.5M. The chart shows a blue line for "Closed + Open (>70%)" which rises from 0 in January to approximately 2.1M by February. A horizontal orange line represents the "Goal" at approximately 1.8M. Text above the chart indicates "CLOSED \$1,820,000" and "OPEN (>70%) \$270,000".
- Today's Events:** A section with a blue icon representing events.
- Today's Tasks:** A section with a blue icon representing tasks and a message: "Nothing due today. Be a go-getter, and check back soon."
- Assistant:** A panel on the right side of the dashboard showing a list of notifications and tasks, including "New lead assigned to you today" for Khaira, "Opportunity is overdue" for Grand Hotels Guest Portable Generators, and "30 days without any activity" for Edge Emergency Generator and MyGuide.

# Step: 03

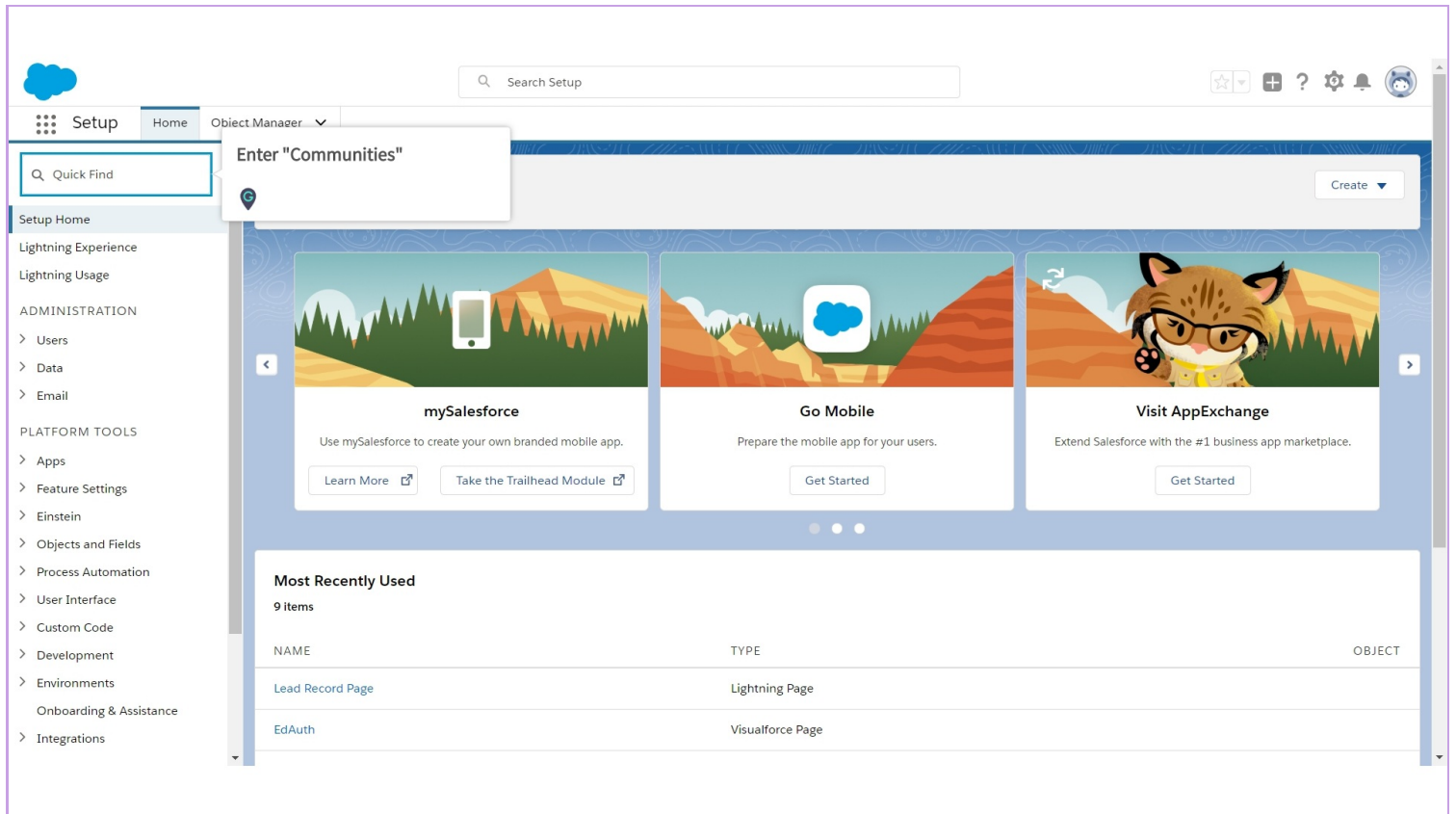
## Click on "Setup"

It will open in new tab



# Step: 04

## Enter "Communities"



The screenshot shows the Salesforce Setup interface. At the top, there is a search bar labeled "Search Setup". Below it, the navigation menu includes "Setup", "Home", and "Object Manager". A search overlay is active, displaying the text "Enter 'Communities'" in a white box with a magnifying glass icon. The main content area features three cards: "mySalesforce" (with a "Learn More" and "Take the Trailhead Module" button), "Go Mobile" (with a "Get Started" button), and "Visit AppExchange" (with a "Get Started" button). Below these cards is a "Most Recently Used" section showing a table of 9 items.

NAME	TYPE	OBJECT
Lead Record Page	Lightning Page	
EdAuth	Visualforce Page	

# Step: 05

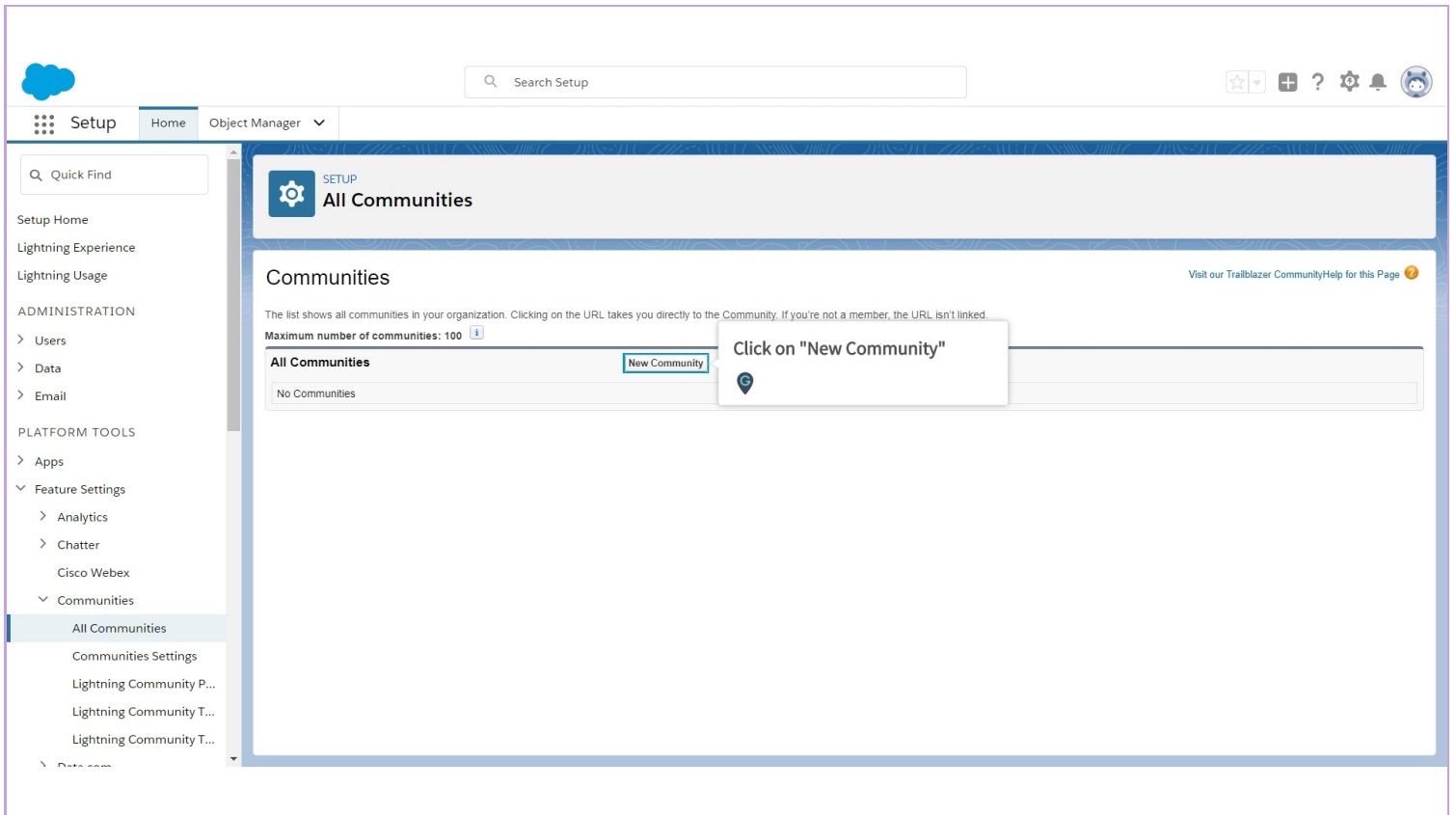
## Click on "All Communities"

The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'Feature Settings', the 'Communities' section is expanded, and 'All Communities' is highlighted. A callout box with the text 'Click on "All Communities"' points to this menu item. The main content area displays a carousel of three cards: 'mySalesforce', 'Go Mobile', and 'Visit AppExchange'. Below the carousel is a 'Most Recently Used' section with 9 items, shown as a table:

NAME	TYPE	OBJECT
Lead Record Page	Lightning Page	
EdAuth	Visualforce Page	

# Step: 06

## Click on "New Community"



## Step: 07

# The Community Creation wizard opens with several templates

Select the template that you want to use

The screenshot shows the Salesforce Lightning Bolt Community Creation wizard. At the top, there is a navigation bar with a "Back to Setup" link on the left, the Salesforce logo in the center, and "Help & Training" on the right. Below the navigation bar, the text "LIGHTNING BOLT" is displayed in a stylized font, followed by the heading "Choose the Experience You Love".

Underneath the heading, there is a "BROWSE BY:" section with three tabs: "All", "Sales", and "Service". The "All" tab is currently selected.

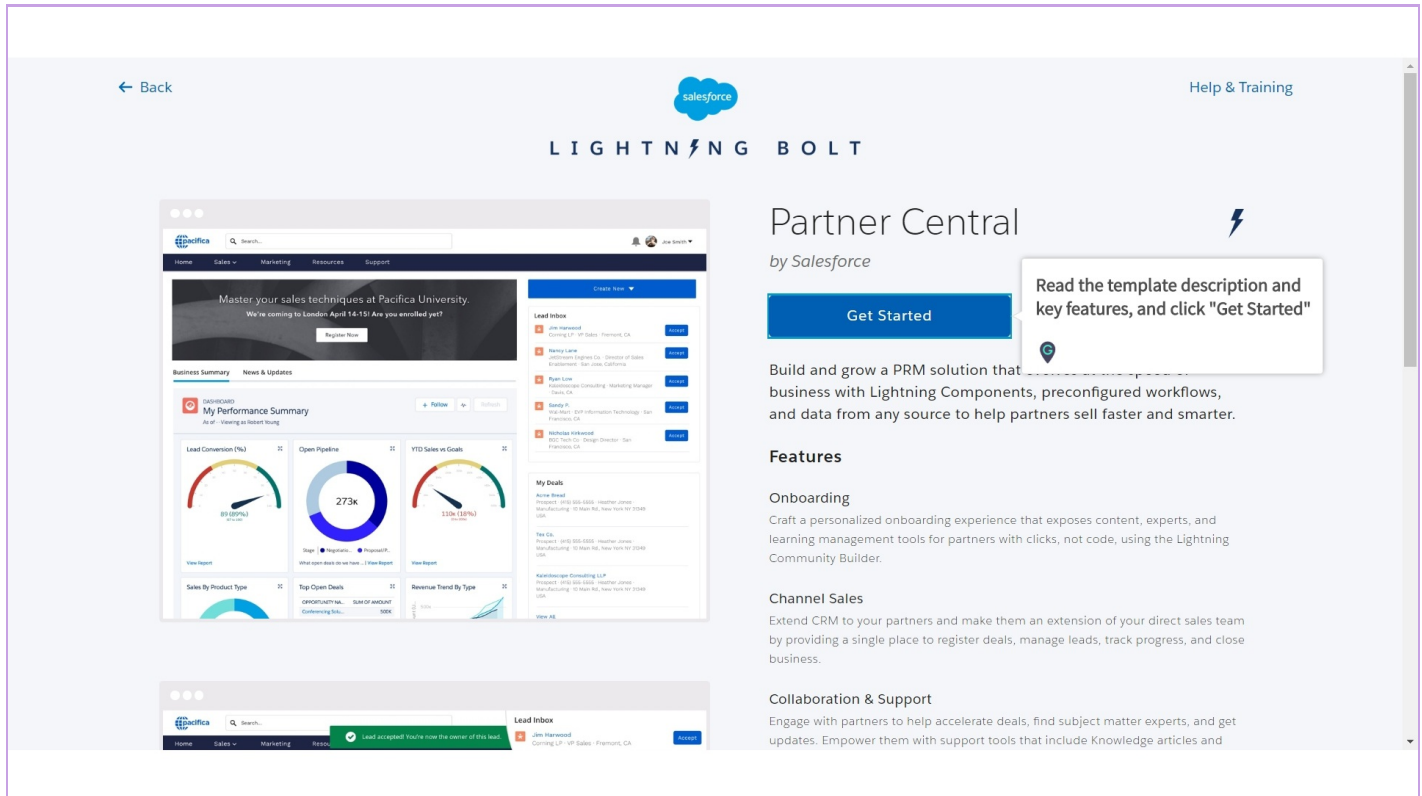
The main content area displays three template cards:

- Help Center** (marked as "New"): Features a search bar and the text "What can we help you with?". Below the card, it lists "Self-Service • Curated Knowledge • Case Deflection • Guest Case Creation" and a brief description: "Give your customers the answers they're looking for. Customers can search for and read articles and contact..."
- Community Creation wizard** (marked as "New"): Features a search bar and the text "The Community Creation wizard opens with several templates". Below the card, it lists "Record Management • Third-Party Integration • Streamlined Profile • Knowledge Base" and a brief description: "Create a responsive portal where customers can access knowledge articles, view and update their accounts, an..."
- Customer Service** (marked as "New"): Features a search bar and the text "Welcome to the Acme Climbing Community!". Below the card, it lists "Self-Service • Collaboration • Customization • Intelligence" and a brief description: "Create a responsive community that lets members post questions, access relevant content and records, view..."



## Step: 08

Read the template description and key features, and click "Get Started"



← Back Help & Training

**salesforce**  
**L I G H T N I N G B O L T**

### Partner Central ⚡

by Salesforce

[Get Started](#)

Read the template description and key features, and click "Get Started"

Build and grow a PRM solution that integrates with your CRM, and data from any source to help partners sell faster and smarter.

#### Features

##### Onboarding

Craft a personalized onboarding experience that exposes content, experts, and learning management tools for partners with clicks, not code, using the Lightning Community Builder.

##### Channel Sales

Extend CRM to your partners and make them an extension of your direct sales team by providing a single place to register deals, manage leads, track progress, and close business.

##### Collaboration & Support

Engage with partners to help accelerate deals, find subject matter experts, and get updates. Empower them with support tools that include Knowledge articles and

# Step: 09

## Enter a community name

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**salesforce**  
**L I G H T N I N G B O L T**

**Enter a community name**

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

Name


URL

**Create**

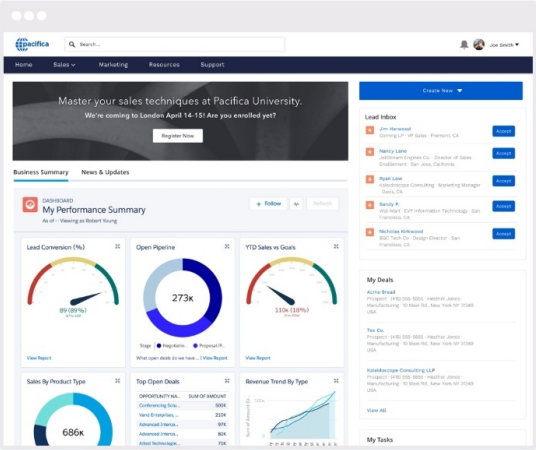
# Step: 10

## Enter URL

← Back

  
**L I G H T N I N G   B O L T**

Help & Training



### Enter a Name

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

Name


URL

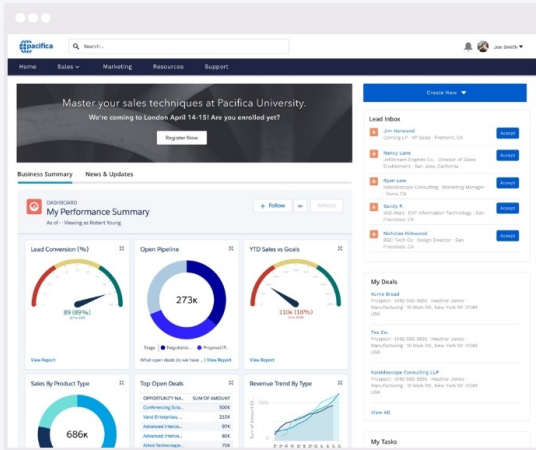
**Enter URL**

# Step: 11

## Click "Create"

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**L I G H T N I N G   B O L T**



Enter a Name

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

Name

URL

Click "Create"

# Step: 12

## A new Community has been created!

The screenshot displays the MyGuide Community Workspaces interface. At the top, the navigation bar includes 'Community Workspaces MyGuide' and a user profile for 'Deeksha Khaira'. The main content area is titled 'MyGuide (Preview - Unpublished)' and features a dark blue banner with the text 'See your favorite metrics right here by getting the latest AppExchange package.' and an 'Install AppExchange Package' button. Below the banner, the 'My Workspaces' section is organized into a grid of six cards: 'Builder' (Build, brand, and customize your community pages), 'Moderation' (Monitor posts and comments, create content), 'Dashboards' (Examine the health of your community with reports and dashboards and engage with community members), 'Administration' (Configure settings and properties for your community), and 'Guided Setup' (Configure features and integrations with step-by-step instructions). A central notification box reads 'A new Community has been created!'. To the right, the 'Quick Links' section lists: 'Community Pulse Metrics', 'Lightning Carousel and Banner Components', 'Trailblazer Community: Community Implementation Group', 'Set Up and Manage Communities Guide', and 'AppExchange'. Below this is a 'Expand Your Reach with Communities' section with a 'START LEARNING >' link and a Trailhead icon. At the bottom, there is a 'What's New' section and a 'Salesforce Winter '19 Release Notes' section with a 'Native CMS, New Help Center Template, Recognition Badges, and' link.

# Thank You!

[myguide.org](https://myguide.org)