

The Salesforce logo, consisting of a blue cloud shape with the word "salesforce" in white lowercase letters inside it.

salesforce

Experience Cloud : Show Me How

Learn about Experience Cloud's out-of-the-box features, best practices and tips & tricks.

September 2, 2021



Topics

MyTrailhead Planning External Sharing

Today's Session

A Few Logistics



Sit Back and Watch

- Don't try to follow along

Ask Questions in the Q&A panel

- We will do our best to answer as many questions live as possible
- We will answer all questions in the chat

Recording will be Emailed the Next Day

- Watch all past recordings:
www.learnexperiencecloud.com/s/topic/0TO1U0000000UGfSWAW/show-me-how

Please Fill Out the Survey at the End



Today's Speakers



Alex Schwab
Senior Success Guide



Parker George
Principal Success Guide



Forward-Looking Statement



Statement under the Private Securities Litigation Reform Act of 1995:

This presentation contains forward-looking statements about the company's financial and operating results, which may include expected GAAP and non-GAAP financial and other operating and non-operating results, including revenue, net income, diluted earnings per share, operating cash flow growth, operating margin improvement, expected revenue growth, expected current remaining performance obligation growth, expected tax rates, the one-time accounting non-cash charge that was incurred in connection with the Salesforce.org combination; stock-based compensation expenses, amortization of purchased intangibles, shares outstanding, market growth and sustainability goals. The achievement or success of the matters covered by such forward-looking statements involves risks, uncertainties and assumptions. If any such risks or uncertainties materialize or if any of the assumptions prove incorrect, the company's results could differ materially from the results expressed or implied by the forward-looking statements we make.

The risks and uncertainties referred to above include -- but are not limited to -- risks associated with the effect of general economic and market conditions; the impact of geopolitical events; the impact of foreign currency exchange rate and interest rate fluctuations on our results; our business strategy and our plan to build our business, including our strategy to be the leading provider of enterprise cloud computing applications and platforms; the pace of change and innovation in enterprise cloud computing services; the seasonal nature of our sales cycles; the competitive nature of the market in which we participate; our international expansion strategy; the demands on our personnel and infrastructure resulting from significant growth in our customer base and operations, including as a result of acquisitions; our service performance and security, including the resources and costs required to avoid unanticipated downtime and prevent, detect and remediate potential security breaches; the expenses associated with new data centers and third-party infrastructure providers; additional data center capacity; real estate and office facilities space; our operating results and cash flows; new services and product features, including any efforts to expand our services beyond the CRM market; our strategy of acquiring or making investments in complementary businesses, joint ventures, services, technologies and intellectual property rights; the performance and fair value of our investments in complementary businesses through our strategic investment portfolio; our ability to realize the benefits from strategic partnerships, joint ventures and investments; the impact of future gains or losses from our strategic investment portfolio, including gains or losses from overall market conditions that may affect the publicly traded companies within the company's strategic investment portfolio; our ability to execute our business plans; our ability to successfully integrate acquired businesses and technologies, including delays related to the integration of Tableau due to regulatory review by the United Kingdom Competition and Markets Authority; our ability to continue to grow unearned revenue and remaining performance obligation; our ability to protect our intellectual property rights; our ability to develop our brands; our reliance on third-party hardware, software and platform providers; our dependency on the development and maintenance of the infrastructure of the Internet; the effect of evolving domestic and foreign government regulations, including those related to the provision of services on the Internet, those related to accessing the Internet, and those addressing data privacy, cross-border data transfers and import and export controls; the valuation of our deferred tax assets and the release of related valuation allowances; the potential availability of additional tax assets in the future; the impact of new accounting pronouncements and tax laws; uncertainties affecting our ability to estimate our tax rate; the impact of expensing stock options and other equity awards; the sufficiency of our capital resources; factors related to our outstanding debt, revolving credit facility, term loan and loan associated with 50 Fremont; compliance with our debt covenants and lease obligations; current and potential litigation involving us; and the impact of climate change.

Further information on these and other factors that could affect the company's financial results is included in the reports on Forms 10-K, 10-Q and 8-K and in other filings it makes with the Securities and Exchange Commission from time to time. These documents are available on the SEC Filings section of the Investor Information section of the company's website at www.salesforce.com/investor.

Salesforce.com, inc. assumes no obligation and does not intend to update these forward-looking statements, except as required by law.



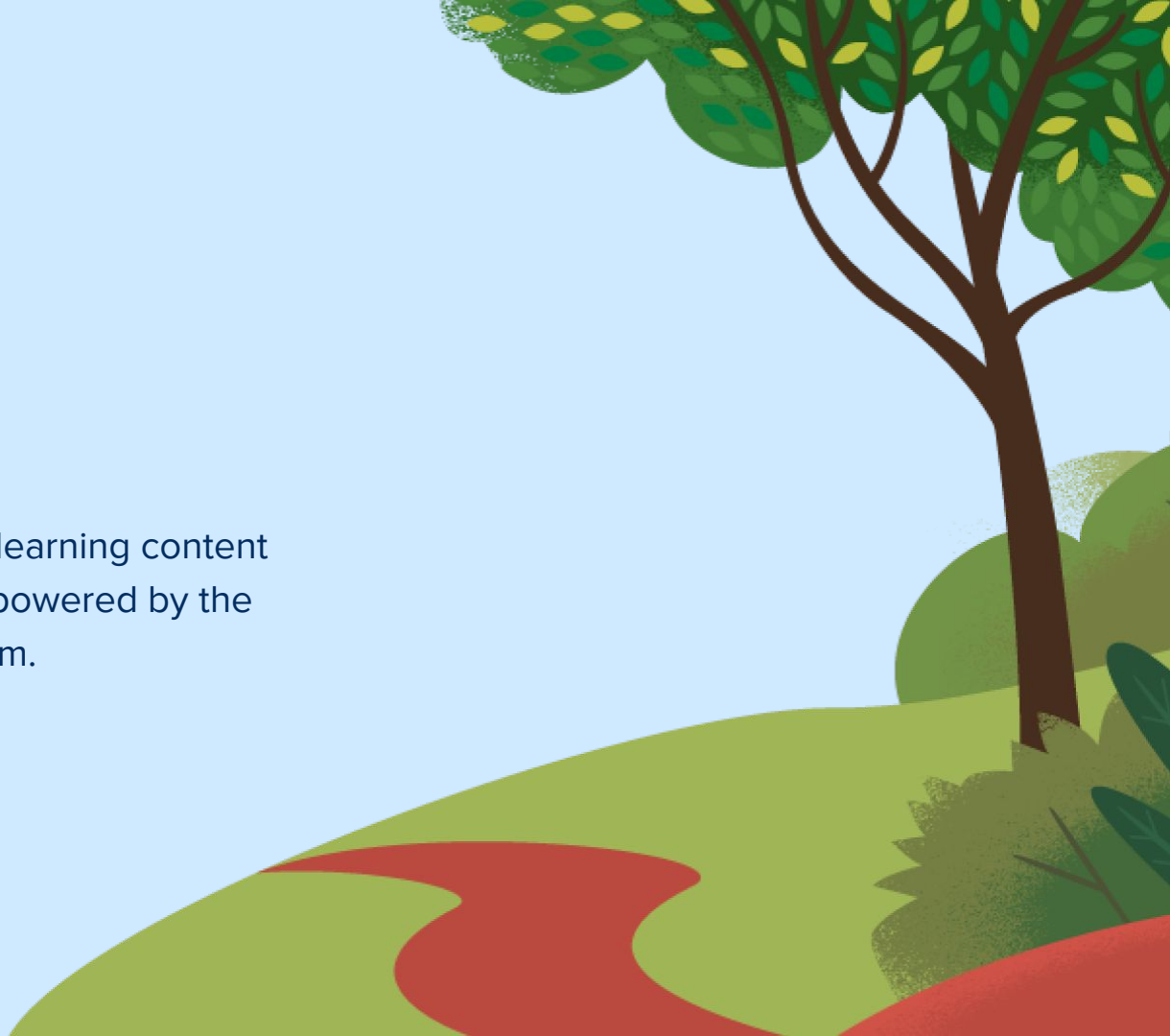
THANK YOU





myTrailhead

Deliver your company's unique learning content through a branded experience powered by the Trailhead online learning platform.

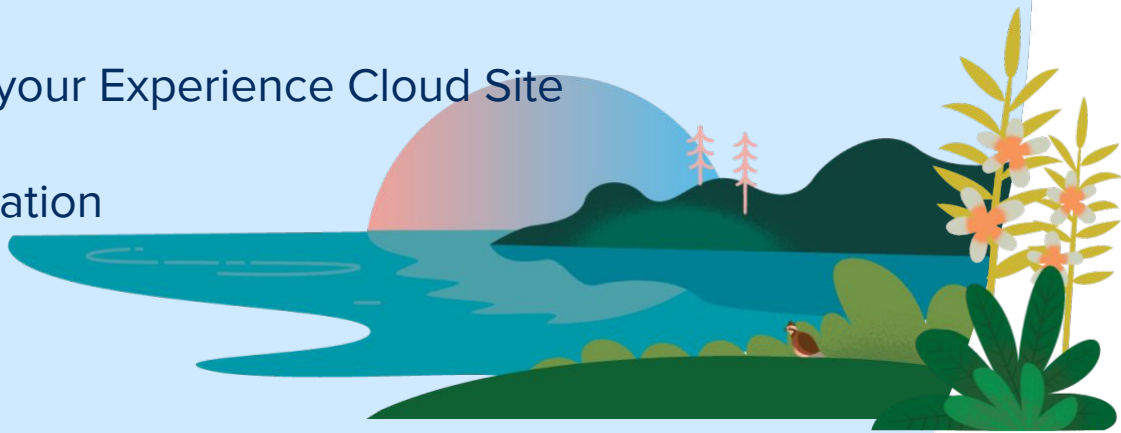




Agenda

myTrailhead

- What is myTrailhead?
- myTrailhead for customers and partners
- Set up myTrailhead
- Set up myTrailhead in your Experience Cloud Site
- Demo
- Trailmaker content creation
- Trail Tracker
- Resources
- Q&A





What is myTrailhead?

What is myTrailhead?

Experience Cloud



Online Learning Experience Platform that enables organizations to leverage the power of Trailhead, to reinvent learning and enablement at their company - with their brand and content.

The screenshot displays the myTrailhead user interface. On the left, a user profile for Alex Schwab is shown with a search bar, navigation tabs (Today, Trails, Modules, Trailmixes), a profile picture, a greeting "Good afternoon, Alex.", a progress bar, and a "Go to My Profile" button. Below the profile, it states "You have 1,625 points" and "Earn 1,375 more points to reach Explorer rank." The "In Progress Trailmixes" section shows a trailmix by Alex Schwab titled "First 90 Days" with a 11% completion status.

The main content area is titled "Newest Badges" and lists three modules:

- Camping Experience**: Test how to module! +100 Points
- myTrailhead Basics**: Get acquainted with your new, fun way to learn and develop in your career +200 Points
- Well-Being at Work**: Learn about our employee well-being program. +300 Points

A "Show More" link is available at the bottom of the list.

On the right, a "Trailmaker" interface is shown with a header "WELCOME, ALEX. LET'S GET BUILDING!". Below the header, there are two sections:

- Get Started with myTrailhead**: Find help for creating, formatting, and publishing content on myTrailhead--and much more.
- Publish content in a flash with content kits**: Browse our library of ready-made modules. Download the ones you want, customise them for your needs, publish, and let the learning begin.

The "My Workspace" section features a table with the following data:

TITLE	LAST MODIFIED	TYPE	ACTIONS
Camping Experience	1:53 PM on 6/15/2021	Module	▼
myTrailhead Basics	1:58 PM on 6/15/2021	Module	▼

A stylized illustration of a forest landscape. Two large, leafy green trees with thick brown trunks frame the top and sides of the image. A small red and white bird is perched on a branch of the tree on the left. The background features rolling green hills, several tall green pine trees, and a clear blue sky with soft, white clouds. In the bottom right corner, there are some yellow and green plants.

myTrailhead for customers and partners

myTrailhead for Customers & Partners

Experience Cloud

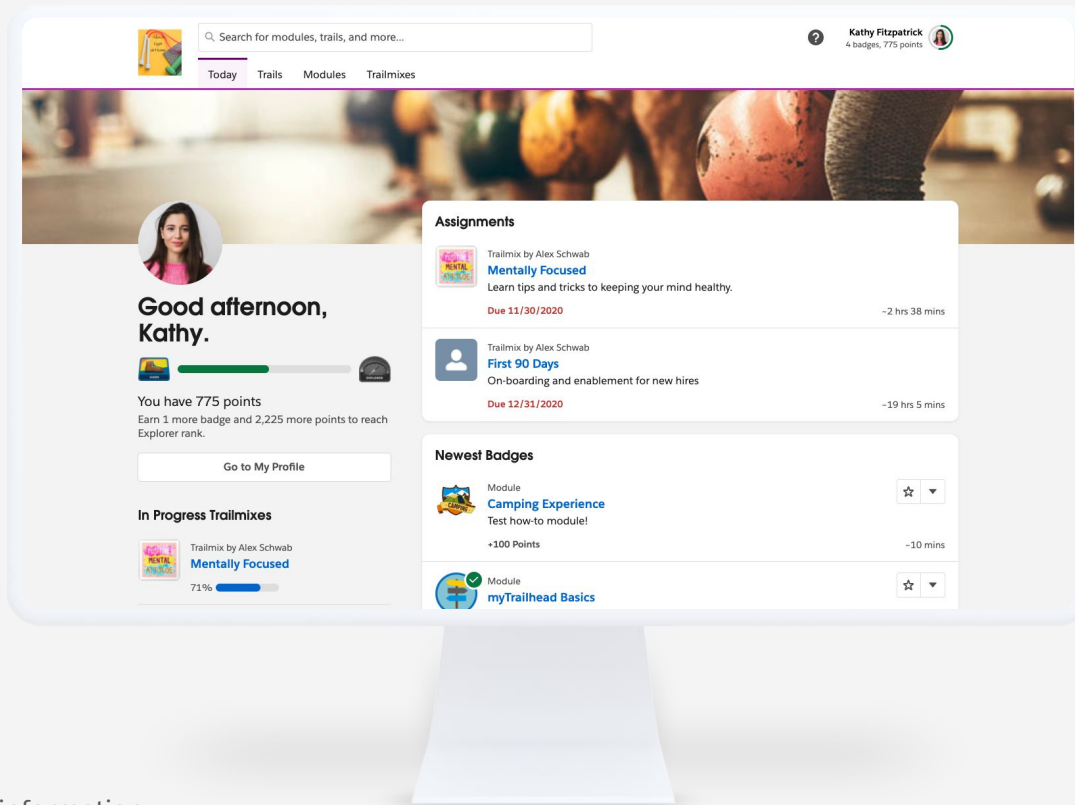


Gives companies the tools they need to empower their customers and partners at scale, while helping to attract and retain.

Use myTrailhead for Customers & Partners to:

- Build Brand Advocates
- Boost Adoption
- Accelerate Onboarding & Enablement
- Drive Value for your Sites, Communities & Portals

*Please reach out to your Account executive for licensing information



A stylized illustration of a forest scene. Two large, leafy green trees frame the top of the image. In the background, there are rolling green hills and several tall, thin evergreen trees. The sky is a light blue gradient. The overall style is clean and modern.

Set Up myTrailhead

Set Up myTrailhead



Identify these 2 roles and understand their responsibilities

Salesforce Administrator

- Set up and configure myTrailhead
- Assign permission sets
- Business process automations
- Setup of in-app learning
- Partner with the enablement manager



Enablement Manager

- Partner with the Salesforce admin
- Determine the learning strategy
- Determine overall change management strategy

RESOURCE: [Launch myTrailhead Resources](#)

myTrailhead Features You Can Use

What's the difference between myTrailhead and the public Trailhead?

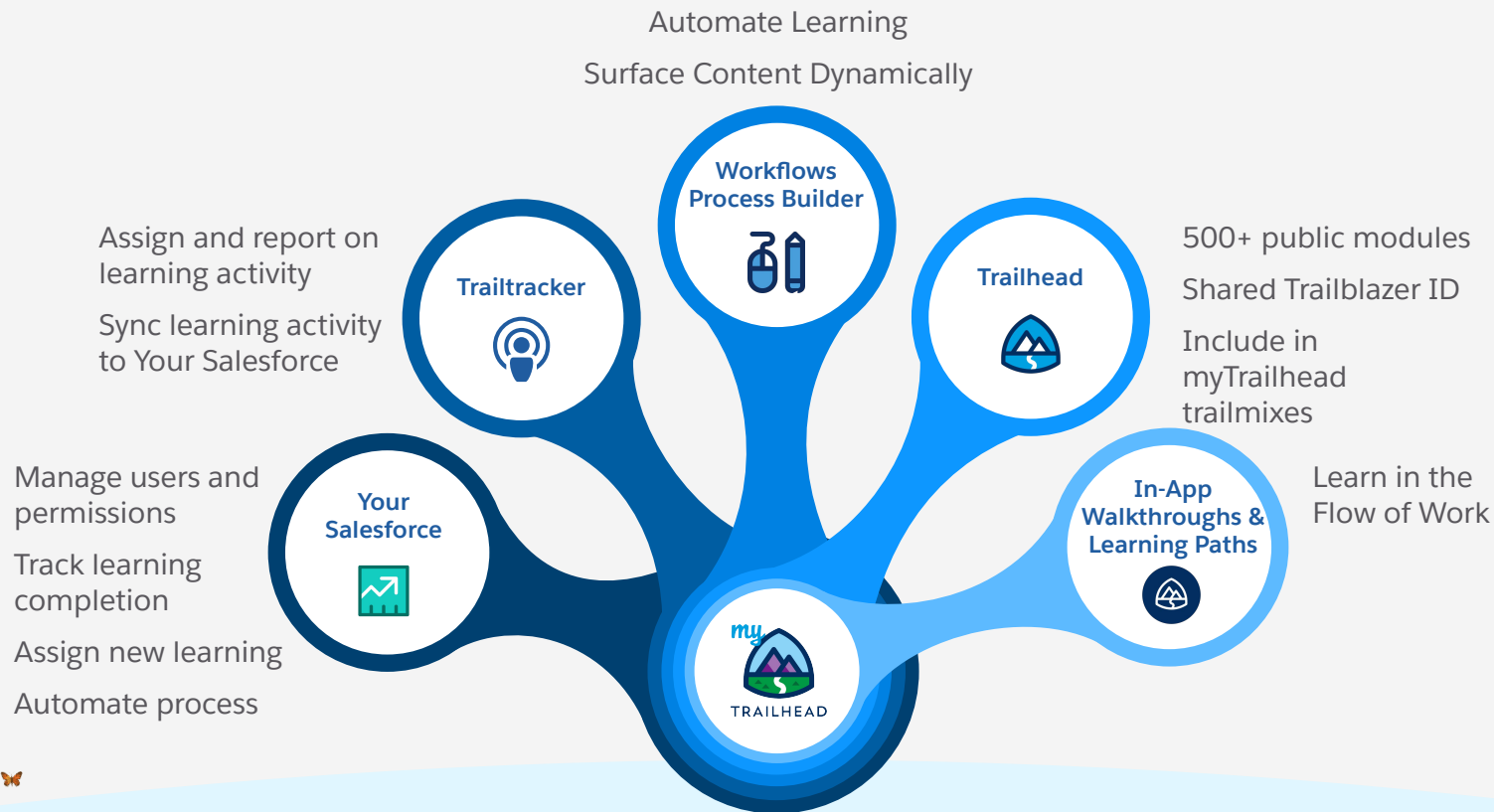


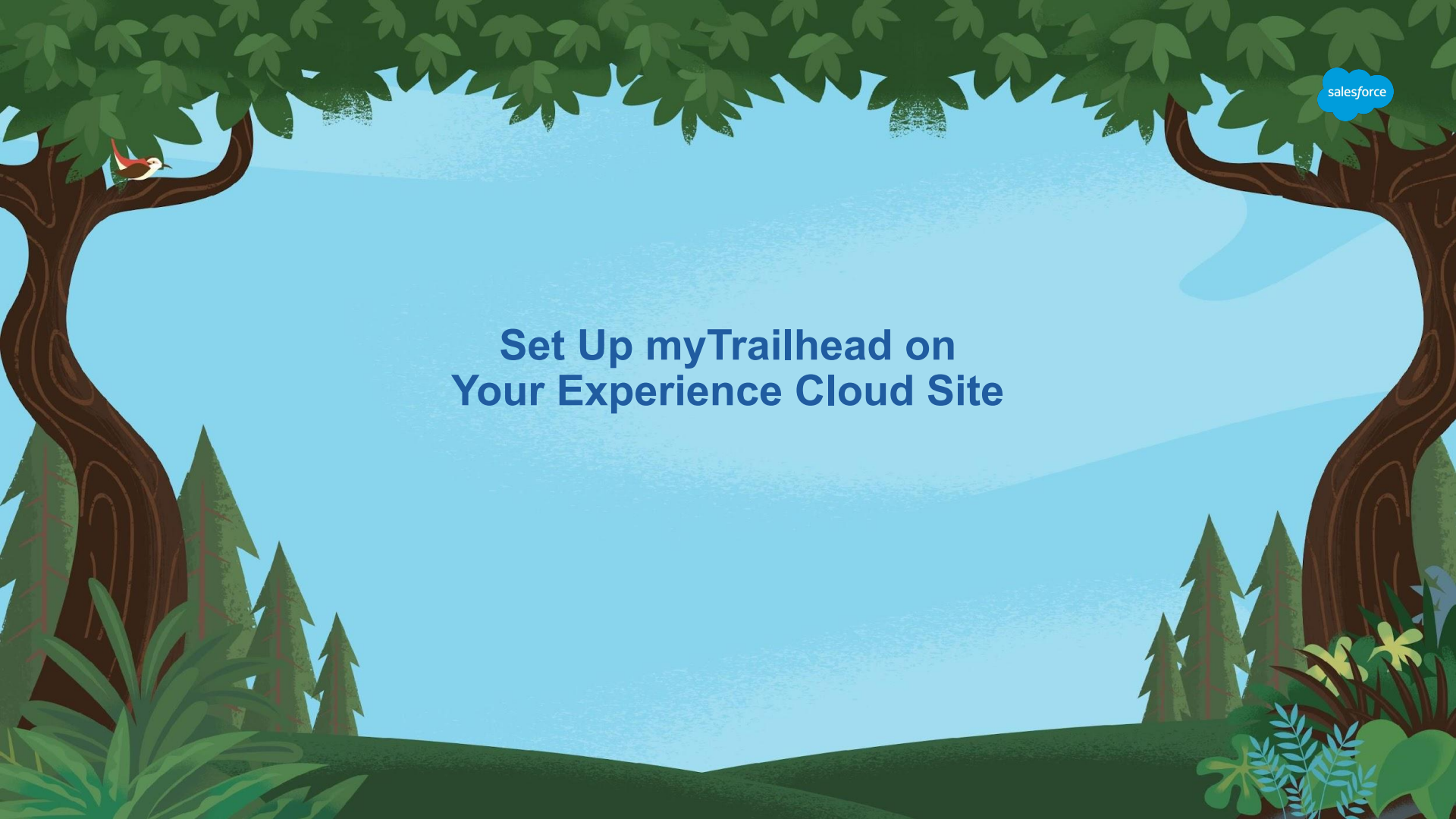
		myTRAILHEAD		
Features	Description	Employees	Customers & Partners	Trailhead
Gamified Learner Experience	Earn points and badges while unlocking ranks as they progress.	X	X	X
Trail Tracker	Gain insights and track progress with reports and dashboards.	X	X	X
Mobile	Access content on any device, in the office, or on the go.	X	X	X
Branding	Incorporate your brand colors, logo, and custom home page image to personalize your experience to your brand.	X	X	
Content Kits	Deploy content quickly with pre-built templates.	X	X	
Trail Maker	Create and publish custom learning content that's unique to your company.	X	X	
Trail Checker	Create custom multiple choice knowledge checks to help learners retain information.	X	X	
Trail Mixer	Aggregate public content and create learning journeys with custom steps.	X	X	
In-App Walkthroughs	Create multi-step learning, taking a learner through a process to drive greater Salesforce learning engagement.	X		
Identity for Employees	Deliver learning for every employee, not just your Salesforce users, with Identity for Employees.	X		

RESOURCE: [myTrailhead Data Sheet](#)



Understand myTrailhead Relationships





Set Up myTrailhead on Your Experience Cloud Site

Salesforce Authentication Provider for Subdomain



Admins configure the Authentication provider for all users

Salesforce Identity

- One-click access to myTrailhead
- No registration process
- Building single sign-on links is not needed. A myTrailhead URL is a direct link to the content
- Define session timeouts and security measures
- Report on user activity



Trailblazer.me

- Users can access myTrailhead and Salesforce Trailhead via the same login
- Users have a profile where they can see all the badges and points they earned
- Users can access myTrailhead on the Trailhead GO mobile app
- You can report on Salesforce Trailhead user activity and assign Salesforce Trailhead trailmixes

RESOURCE: [Considerations for Choosing Salesforce Identity for myTrailhead](#)

Set Up myTrailhead on Experience Cloud



1. Assign the myTrailhead license and permission set to your Experience Cloud site members.
2. To run reports that include your site members' myTrailhead activity, install **Trail Tracker** in the Salesforce org where your Experience Cloud site is configured.
3. Build direct links to myTrailhead from your Experience Cloud site.

Permission Set
myTrailhead Trailblazer Content Access

Find Settings... Clone Edit Properties Manage Assignments

Permission Set Overview > System Permissions

System Permissions Edit

▼ System

Permission Name	Enabled	Description
myTrailhead Branding Management	☐	Let users manage branding on myTrailhead.
myTrailhead Content Access	☒	Let users log in to myTrailhead and view private namespaces.
myTrailhead Content Creation	☐	Give users access to Trailmaker content-styling tools.
myTrailhead Custom Steps	☐	Let users create custom steps in trailmixes.
myTrailhead Preview Mode	☐	Let users preview content on myTrailhead.
myTrailhead Release Management	☐	Let users manage content releases.

To login to myTrailhead:

myTrailhead Content Access AND membership in the site

A stylized illustration of a forest landscape. Two large, leafy green trees with thick brown trunks frame the top and sides of the image. A small red and white bird is perched on a branch of the tree on the left. The background features rolling green hills and several tall, thin evergreen trees. The sky is a light blue gradient. The word "Demo" is centered in the middle of the image.

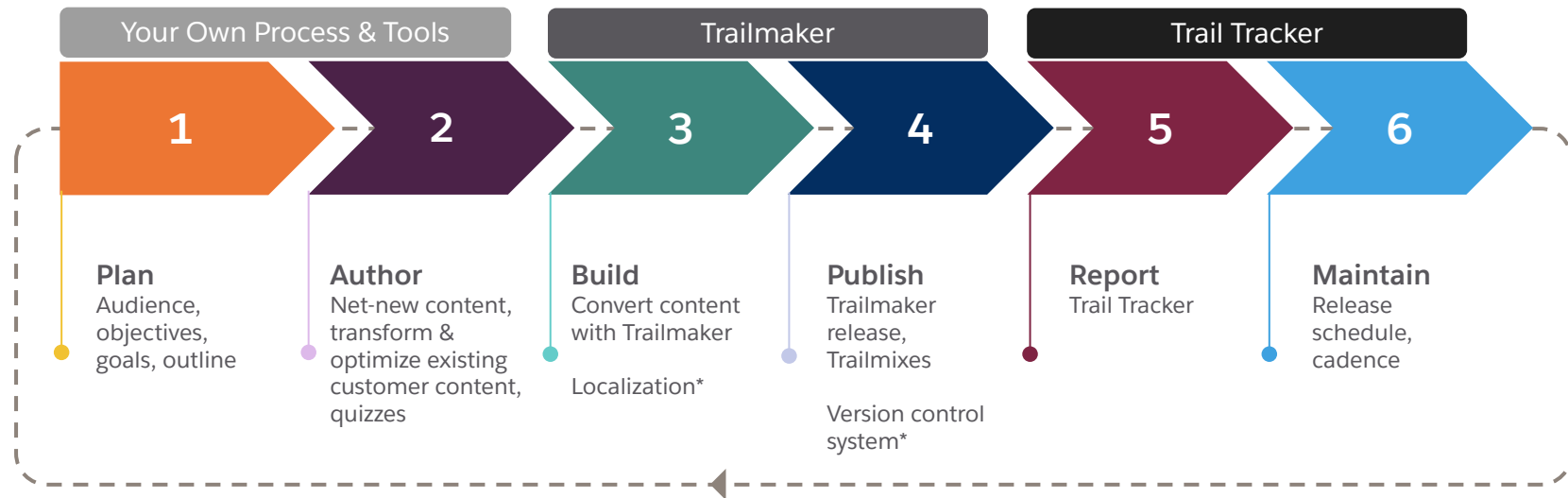
Demo

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Trailmaker Content Creation

Hit Your Content Milestones

6-phase content development framework



** Version control system and localization will need to occur outside of myTrailhead.

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Trail Tracker

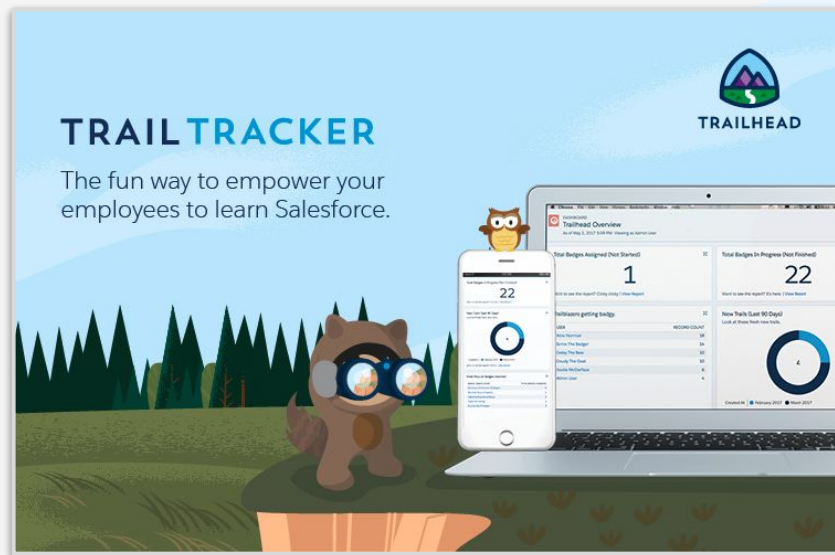
Install Trail Tracker from the AppExchange



Guide your employees through their learning adventure with Trail Tracker

- Easy access to full learner progress and reporting
- Assign trailmixes to learners
- Customize prebuilt reports and dashboards
- Gain access to custom objects that will enable you to automate business processes and change management
- Syncs once a day at the time you choose

[Get It Now](#)



A stylized illustration of a forest landscape. Two large, leafy green trees with thick brown trunks frame the top and sides of the image. A small red and white bird is perched on a branch of the tree on the left. The background features rolling green hills, several tall green pine trees, and a clear blue sky. The word "Resources" is centered in the middle of the image in a blue, sans-serif font.

Resources

Resources

myTrailhead in Experience Cloud

Set Up myTrailhead on Experience Cloud

https://help.salesforce.com/s/articleView?id=sf.mth_set_up_mytrailhead_in_your_community.htm&type=5

Get Started Set Up myTrailhead Webinar (Premier Customers)

<https://help.salesforce.com/s/articleView?id=000351774&type=1>

Authentication Method Considerations

https://help.salesforce.com/s/articleView?id=sf.mth_considerations_for_choosing_mytrailhead_identity.htm&type=5

myTrailhead Basics Trailhead

<https://trailhead.salesforce.com/en/content/learn/modules/mth-basics>



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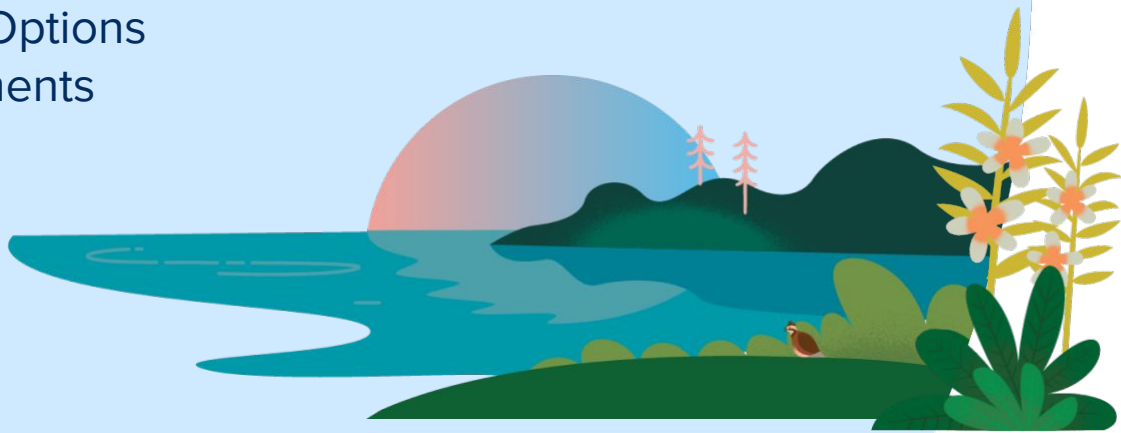
Q&A



Agenda

Planning External Sharing

- External Sharing - the Basics
- Define Your Sharing Requirements
- Explore Your Sharing Options
- Update Your Requirements
- Example Scenarios
- Resources
- Q&A



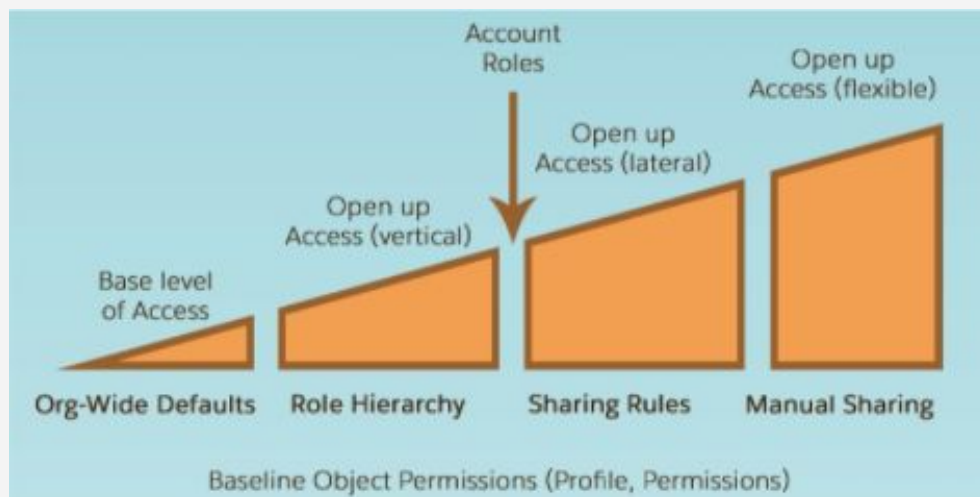
External Sharing - the Basics

External Sharing - the Basics

Experience Cloud



Baseline object permissions and org-wide defaults are the foundation. Administrators can then examine roles, sharing sets and rules, and additional options to control record access



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Define Your Sharing Requirements

Steps to Define Your Sharing Requirements

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1. Add the business requirement
2. Add the External License Type that will be used
3. Identify the object (What are you sharing?)
4. Identify who owns the record (Who owns it?)
5. Which users or groups need access to the records (Who are you sharing with?)
6. What sharing options will be used (How is it shared?)

Steps to Define Your Sharing Requirements (Example)



Experience Cloud

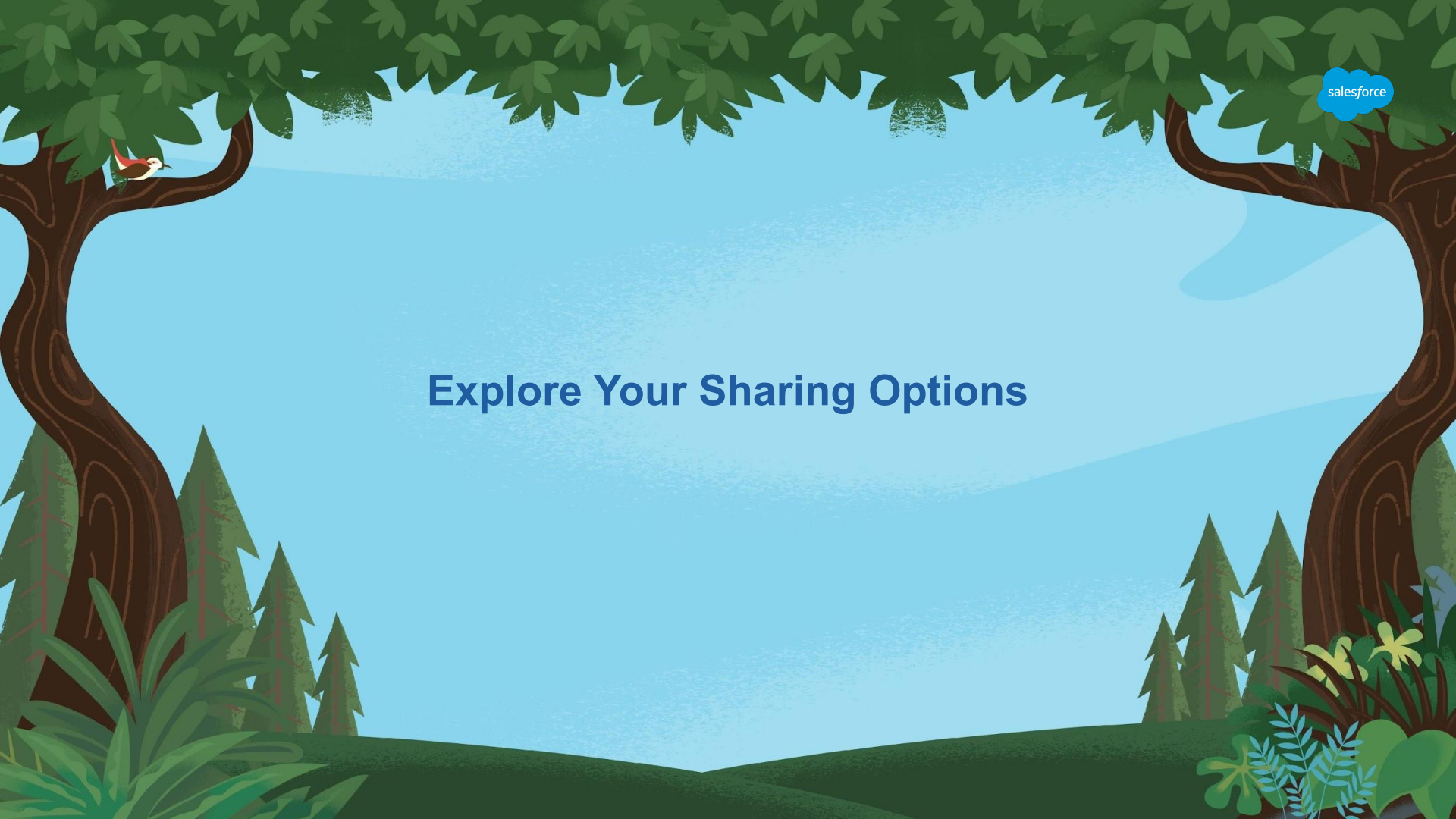
Business Requirement	External License Type	What are you sharing?	Who owns it?	Who are you sharing with?	How is it shared?

Steps to Define Your Sharing Requirements

Experience Cloud



Business Requirement	External License Type	What are you sharing?	Who owns it?	Who are you sharing with?	How is it shared?
Customer can see all their Cases	Customer Community	Cases	The customer	Only the customer, all internal users	Sharing Set

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Explore Your Sharing Options

Sharing Options

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Review all available sharing options of your license(s).

Sharing Option	Customer Community	Customer Community Plus	Partner Community	External Apps
Sharing Sets	Yes	Yes	Yes	Yes
Share Group	Yes			
Folders (Reports and Libraries)		Yes	Yes	Yes
Sharing Rules		Yes	Yes	Yes
Manual Sharing		Yes	Yes	Yes
Partner Role Hierarchy		Yes	Yes	Yes

[Click for the full chart](#)

Sharing Option	Customer Community	Customer Community Plus	Partner Community	External Apps
Sharing Sets	Yes	Yes	Yes	Yes
Share Group	Yes			
Folders (Reports and Libraries)		Yes	Yes	Yes
Sharing Rules		Yes	Yes	Yes
Manual Sharing		Yes	Yes	Yes
Partner Role Hierarchy		Yes	Yes	Yes
External Account Hierarchies		Yes	Yes	Yes
External Delegated Admin		Yes	Yes	Yes
Super User		Yes	Yes	Yes
Account Relationships (Account Relationship Data Sharing Rules)		Yes	Yes	Yes
Account & Opportunity Teams		Yes	Yes	Yes
Apex Managed Sharing		Yes	Yes	Yes



Identify Sharing Capabilities

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Ten steps to follow for each requirement (Link to [Sharing Matrix](#))

1. Select the [Community License Type](#) and document the object access
2. Review the External [Organization-Wide Defaults](#)
3. Does the [Account Role Hierarchy](#) provide the record access?
 - Customer Community Plus and Partner Community, and External Apps licenses
4. Extend access with [Sharing Sets](#)
5. Use [Sharing Groups](#) to share records owned by High-Volume Community Users

(continued on next page)

Identify Sharing Capabilities (continued)

Experience Cloud



Ten steps to follow for each requirement

6. Enable [Account](#) & [Opportunity](#) Teams
 - Account Teams: set level of access for Account, Opportunity and Case objects.
 - Opportunity Teams: set level of access for Opportunity object
7. Use declarative [Sharing Rules](#) to extend access
8. Grant access with [Account Relationships](#), point to point relationships with granular data access
9. Set up [External Account Hierarchy](#)
10. Don't forget about Built-in Sharing Behavior (aka [implicit sharing](#))
 - Example: Parent/child relationship

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Update Your Sharing Requirements

Update Your Sharing Requirements

Experience Cloud



Business Requirement	External License Type	What are you sharing?	Who owns it?	Who are you sharing with?	How is it shared?
Customer can see all their Cases	Customer Community	Cases	Customer User	Customers on the same Account, internal users	???

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Example Scenarios

Scenario 1: Unauthenticated Users

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Business Requirement	External License Type	What are you sharing?	Who owns it?	Who are you sharing with?	How is it shared?
Guest User needs to be able to create a Case	N/A	Case	Guest user (rule to assign to Internal User upon creation)	Internal User (Case Manager)	Guest User Profile
Guest User needs to be able to view a Knowledge article	N/A	Knowledge Articles	Knowledge Manager	Guest Users	Guest User Profile

Scenario 2: Self-Service Users

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Business Requirement	External License Type	What are you sharing?	Who owns it?	Who are you sharing with?	How is it shared?
Customers need to view Custom object data (Warranty)	Customer Community	Warranties	Internal user	Customer contact on the record	Sharing Set
Customers need to view Product Manuals (Files) in organized folders	Customer Community Plus	Libraries (File Folders)	Internal users	Customers	Folders (Libraries)

Scenario 3: Partner Users

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Business Requirement	External License Type	What are you sharing?	Who owns it?	Who are you sharing with?	How is it shared?
Partner A access to opportunities associated to Partner B	Partner Community	Opportunities	Partners or Internal Users	Partners associated with a different Account	Account Relationships
Partner Managers access to Leads owned by Partner Users	Partner Community	Leads	Partner Users	Partner Managers	Sharing Rules

Resources



Planning External Sharing

Blog: Sharing in Experience Cloud

<https://www.learnexperiencecloud.com/s/article/Sharing-in-Communities-Uncovering-the-best-sharing-option-for-your-external-use-cases>

Show Me How: External Sharing

<https://www.learnexperiencecloud.com/s/news/show-me-how-june-11-2020-MC65E4EQKHYRA7VEZ3BDKAITDOAU>

Salesforce External User Sharing Resource Matrix (direct link to download .xls file)

<https://sfdc.co/KdVbE>



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Q&A

Thank You

