# User Configuration Guide Overview

To start working with the package and receive benefits from the ready-made authorization or registration form, you must familiarise yourself with this User Guide before or after installing the package on your Org. This will help to understand the basics of working with Passwordless components and will help to exclude possible negative consequences from improper use of components.

Components Setup

1. Open an Org Setup and find the All Sites setting in the Digital Experiences section.
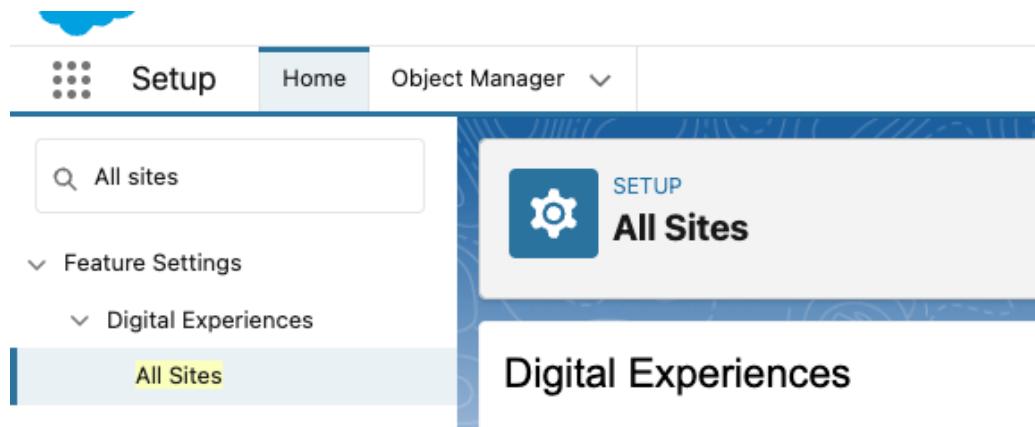
2. Find the Site you want to configure and click on the Builder link near the Site Name.

3. Open the Pages menu and click on the Login page
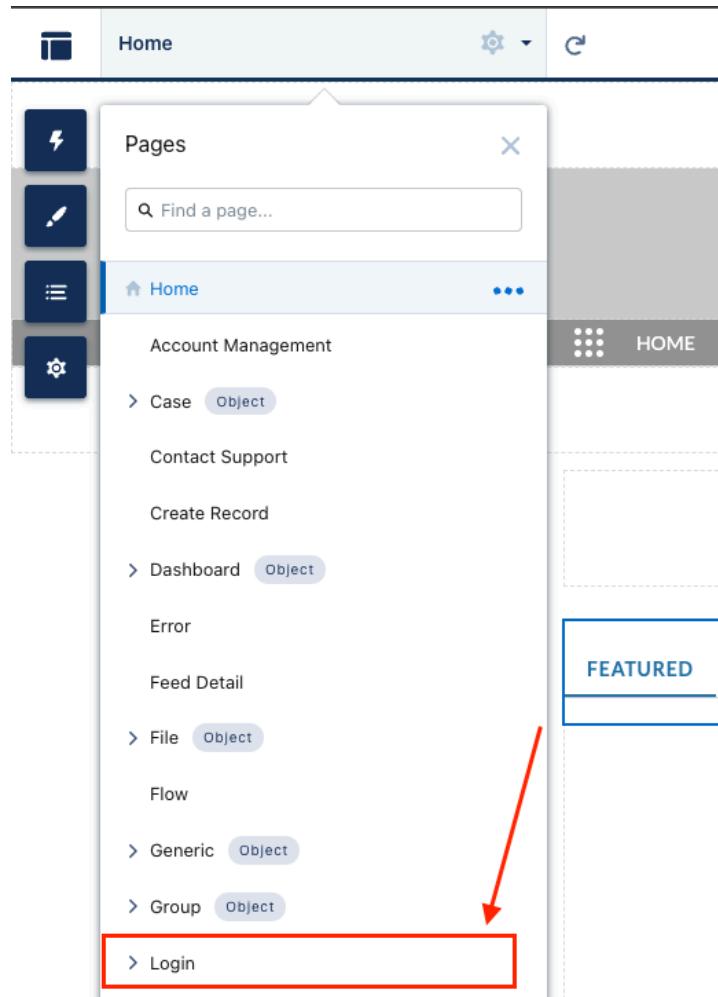

4. Open the Components tab and locate the lwcPasswordlessLogin component
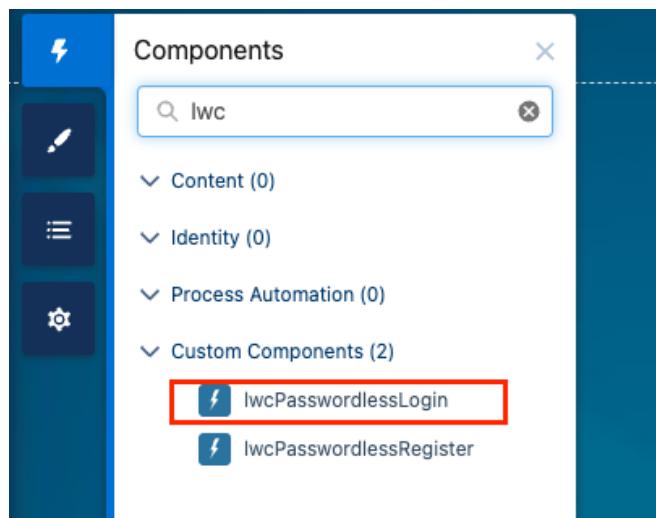
5.   Drag and drop in on the Login form.
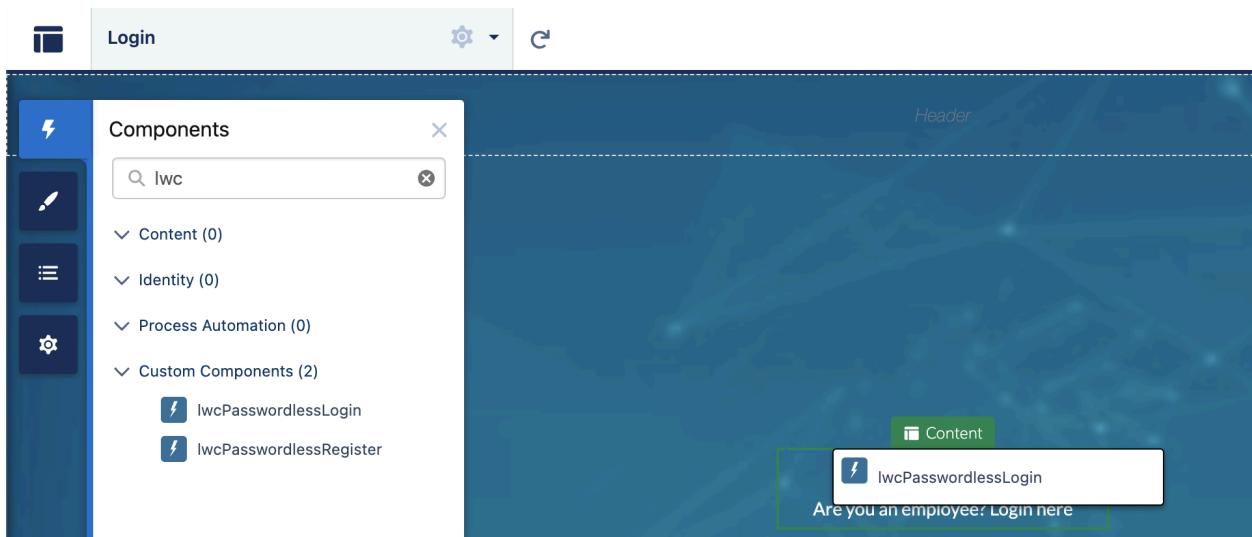
6.   Open the Pages menu and open a Login page sub-menu. Click on the Register page.
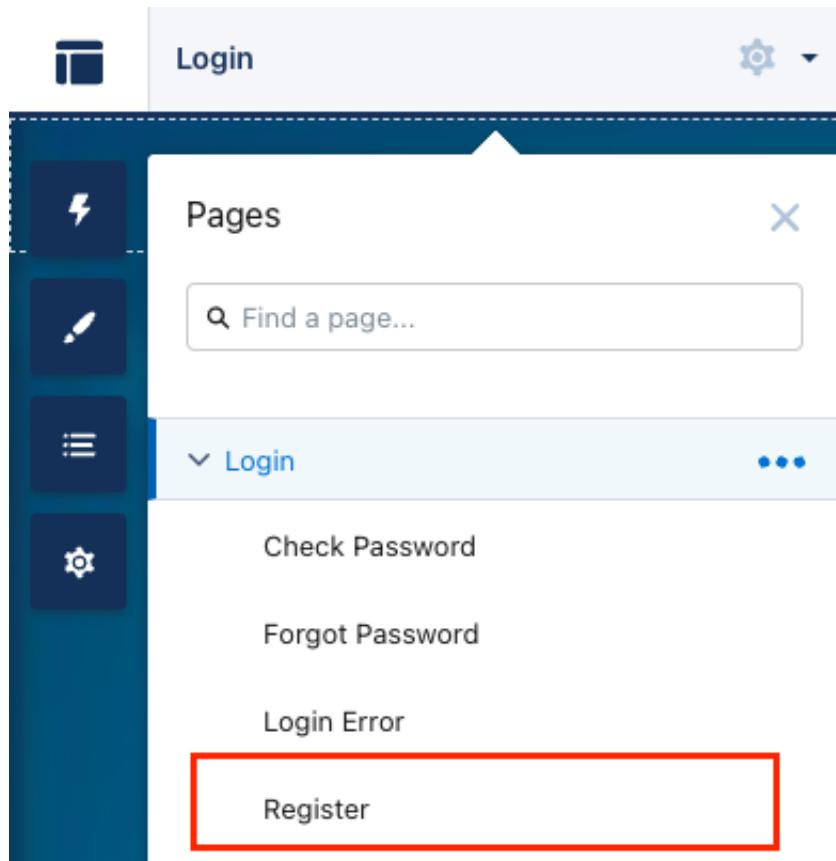
7.   Open the Components tab and locate the lwcPasswordlessRegister component.
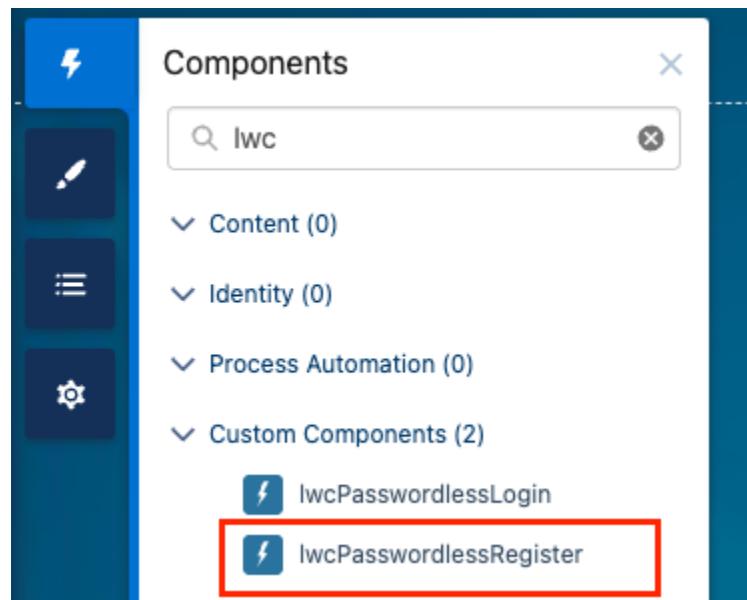
8.   Drag and drop in on the Register form.
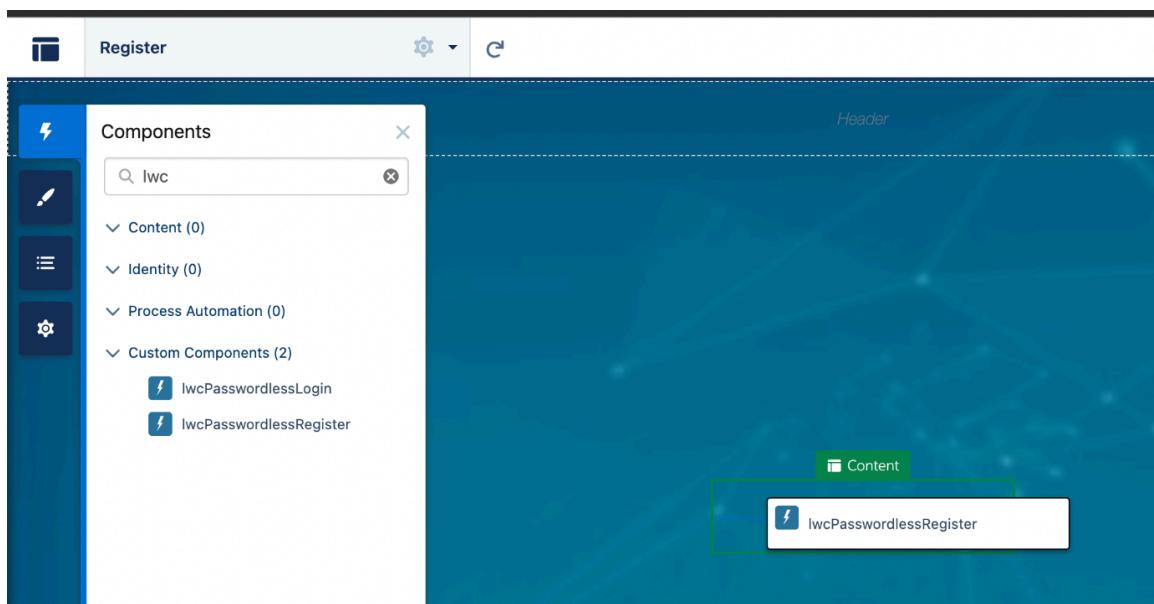
Additional Configuration

1.   Permission set assignment

1.1.   Since each separate Digital Experience site has its own Guest User (with its own community profile), there is a need to give users access to the Apex controller classes. This could be done using a [Passwordless Package](#) permission set (Setup -> Permission Sets -> Passwordless Package -> Manage Assignments).
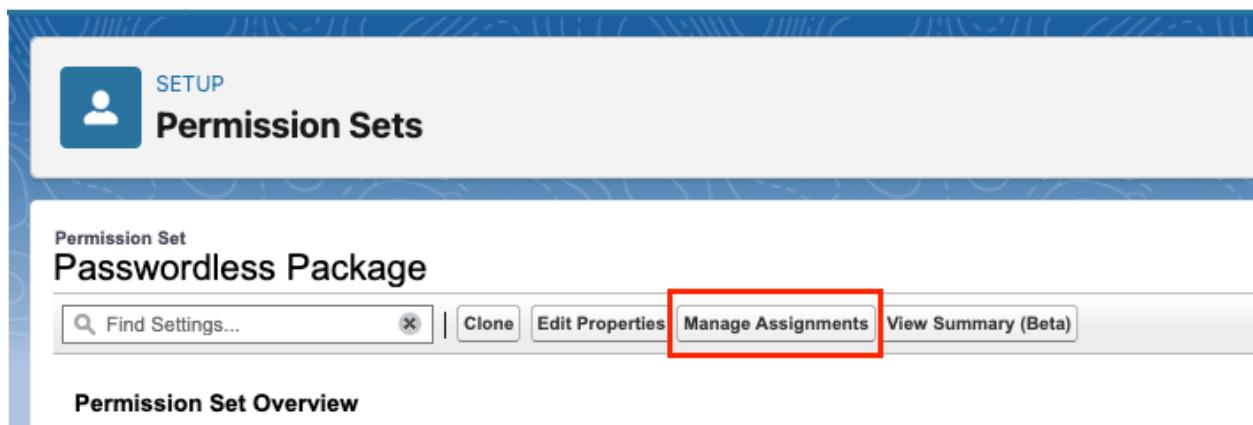
1.2.   In order to have the possibility to add the package components to the Login/Register pages, ensure, that both login and registration pages have an "Experience Builder Page" type selected (Administration workspace -> Login & Registration -> Login Page Setup/Registration Page Configuration).

1.3.　　　To configure the Login/Registration pages a Digital Experience site should be published and should have an Active status.
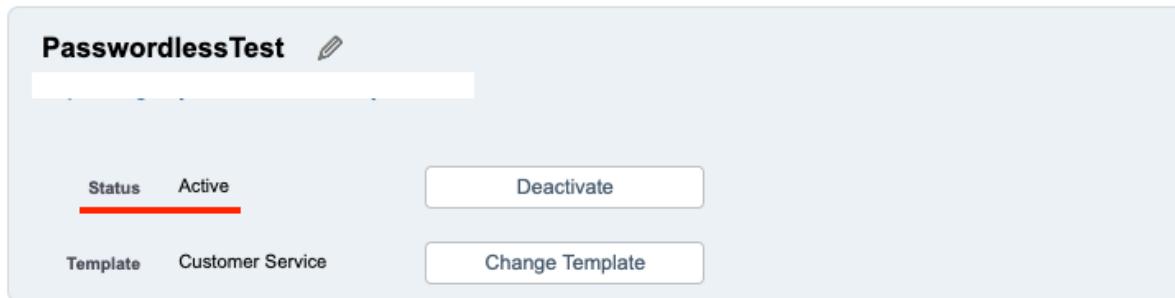
2.　Custom Metadata Type Management

In order to create a different sign-in/sign-up experience within different community sites, a custom metadata type called "Passwordless Configurations" should be configured. Each custom metadata record should be applied to one digital community site. This allows admins to configure, which site users, that are allowed to self-register, would have access to the User Details section. Also, using a custom metadata type, admins could define a profile, which will be set to the newly created users and used to search users for the sign-in process.

A step-by-step guide for creating a new Custom Metadata Type record for previously created community site:

1. Open Org Setup page.
2. Type "Custom Metadata Types" in Quick Find Box.
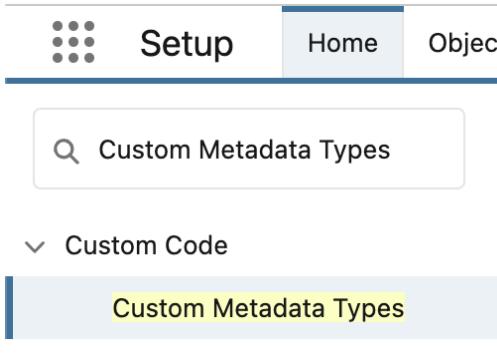
3. Open a Custom Metadata Type section.
4. Find the "Passwordless Configuration" custom metadata type. Click on the Manage Records link.

5. Click a New button

6. Populate fields of the new Custom Metadata Type record
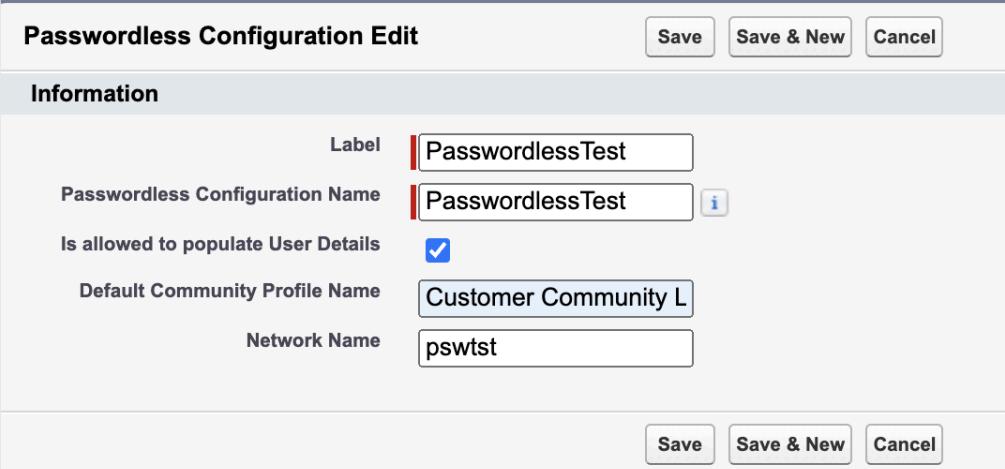
7. Click the Save button.

Note: Label and Passwordless Configuration Name (Name) are system fields, used to indicate the record between other records. Those fields are not used directly in the package logic.

An Is allowed to populate User Details checkbox is used to indicate, in which community site users, during the self-registration process, are allowed to populate fields in the User Details section. Otherwise, those field would be auto-populated.

The Default Community Profile Name field used to populate the Profile name for the Community Site users. If this field remains empty, the default profile name would be a "Customer Community Login User".

The Network name is the name of the Network, in which the Community site is located.

Turning On Basic features for Digital Experiences

In case, when the package was installed to the org, where the Digital Experience site wasn't configured properly, there is a list of the following jobs to do:

1. Activate the Digital Experience site.

This step is required to generate standard login and registration pages (experience builder pages) on which components would be located.
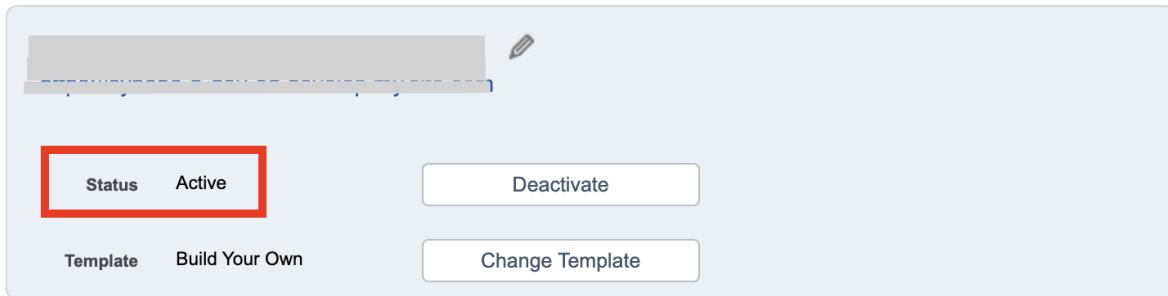
2. External Profiles actions for Users.

To allow site external profiles to Create/Update user records, you need to configure it in the Digital Experience's Settings menu. This could be achieved by selecting the "Allow using standard external profiles for self-registration, user creation, and login" checkbox in the "Role and User Settings".
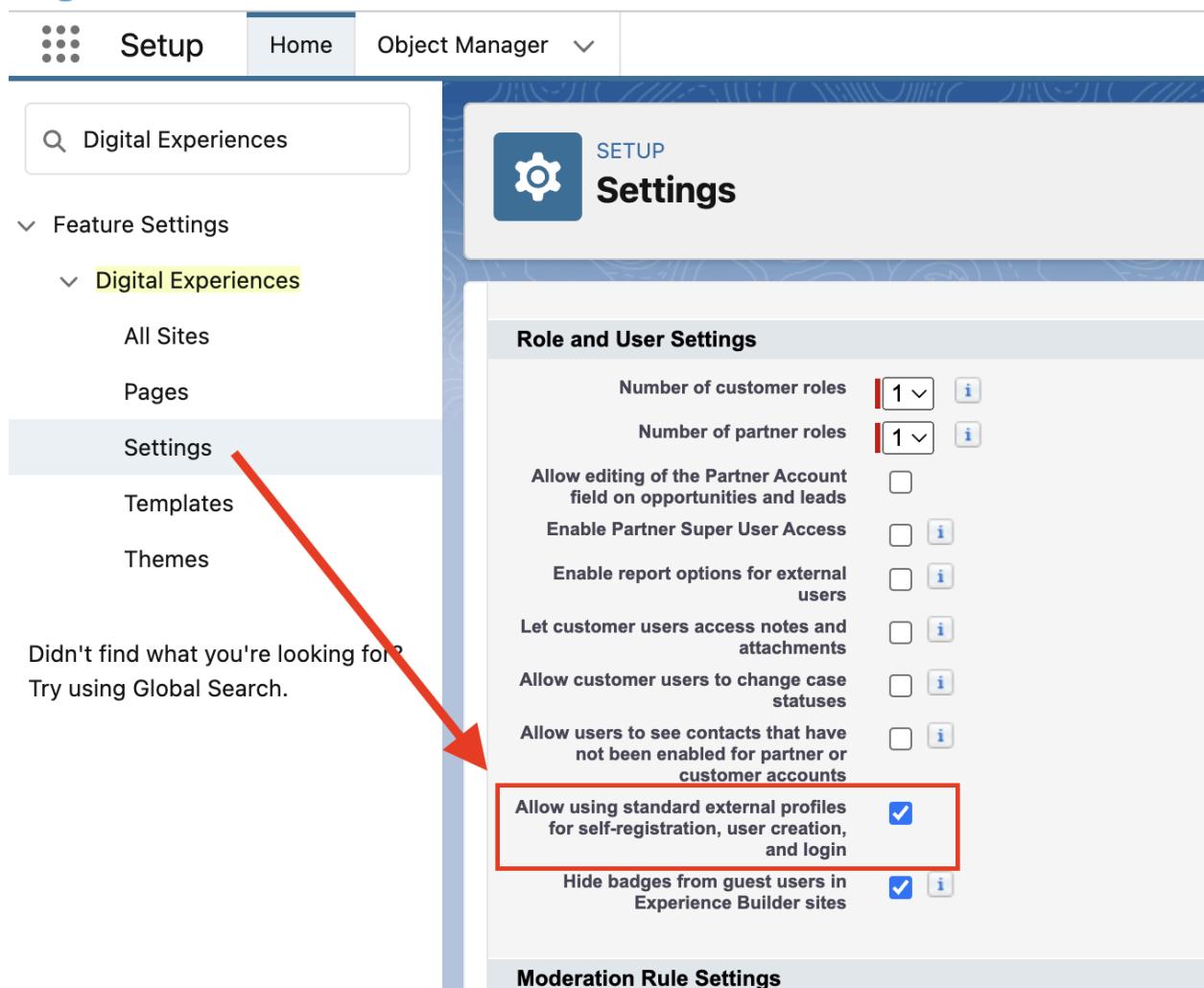
3. Custom Email Template

You could replace a standard One-Time password email template with a custom one, that's included in the package. To do this, open the Administration page of the Digital Experience site and select an "Emails" tab. Scroll down to the Email Templates section

and choose a "Custom One-Time Password Email" template for the One-Time Password.