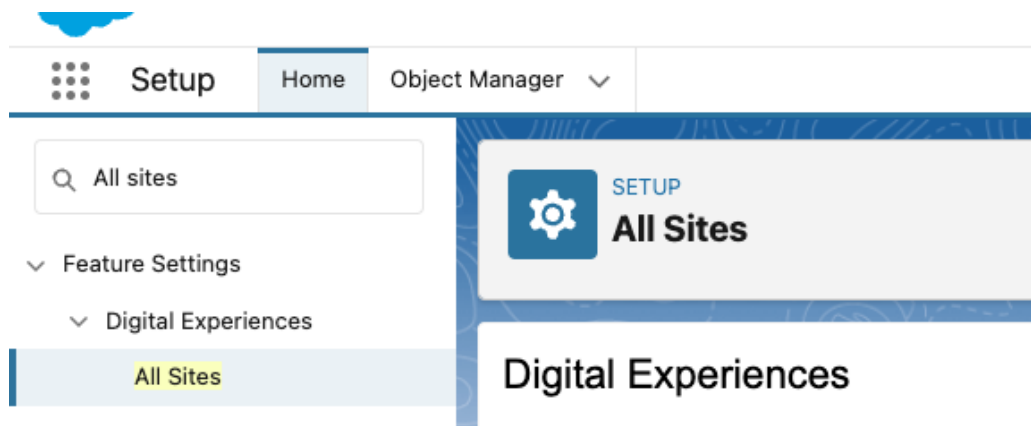


User Configuration Guide Overview

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

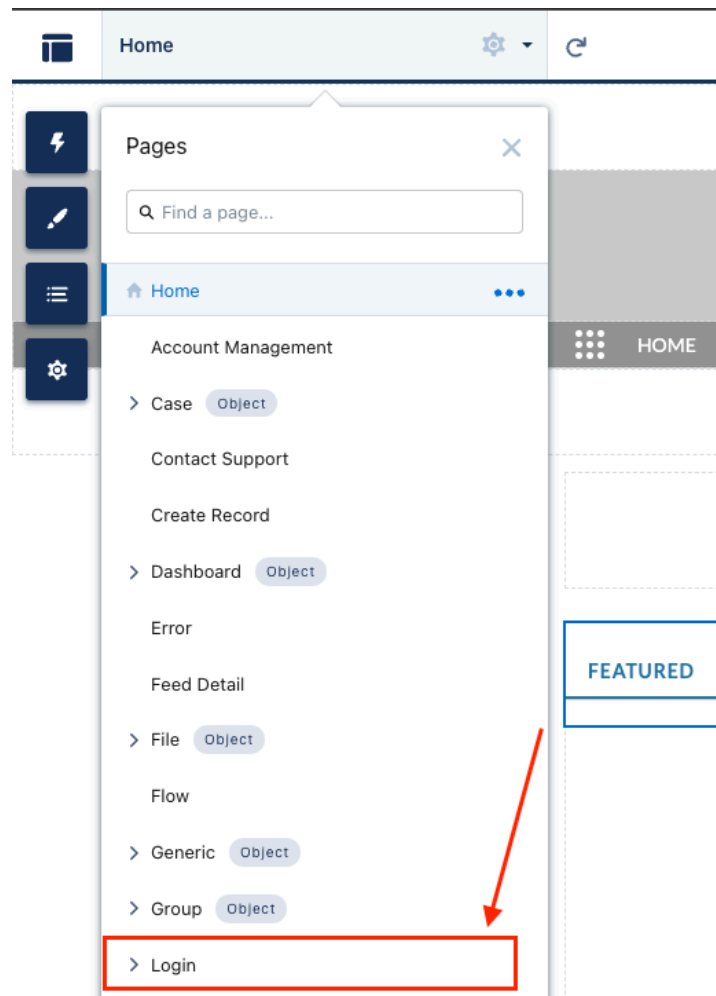
1. Open an Org Setup and find the All Sites setting in the Digital Experiences section.



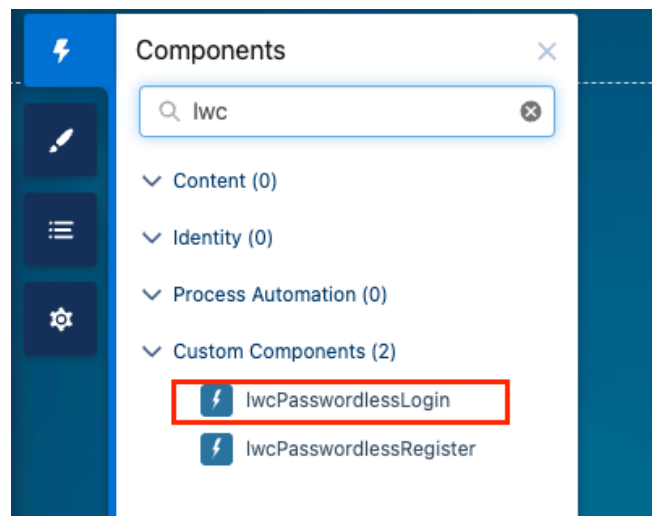
2. Find the Site you want to configure and click on the Builder link near the Site Name.

All Sites				New
Action	Name	Description	Framework	
Workspaces			Visualforce	
Workspaces	Builder	PasswordlessLWC	Lightning Web Runtime	Enhanced
Workspaces	Builder	PasswordlessTest	Aura	
Workspaces	Builder		Aura	

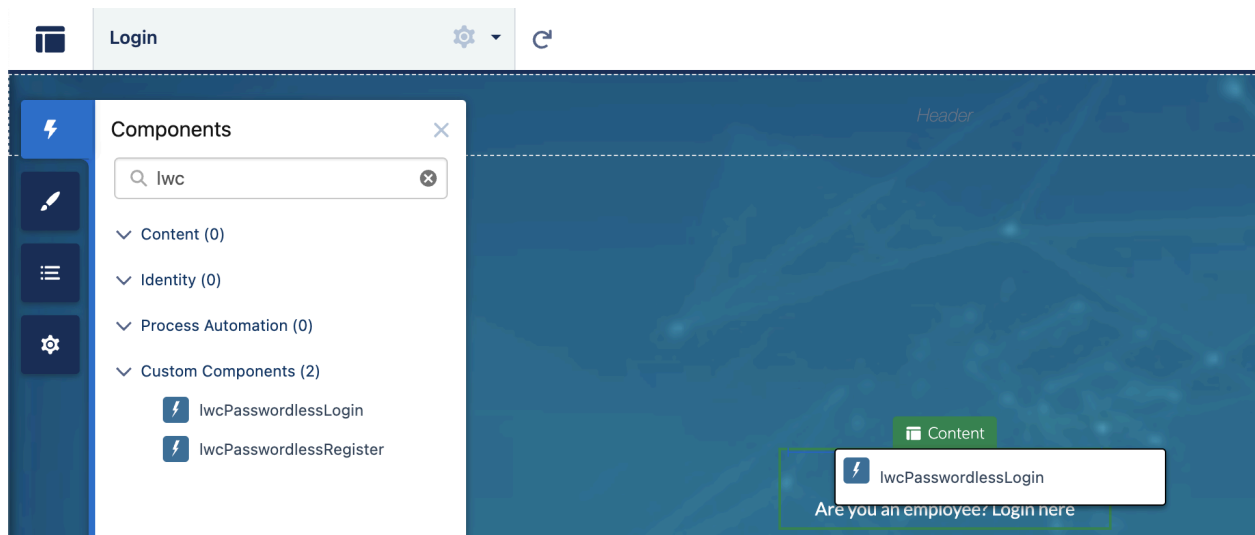
3. Open the Pages menu and click on the Login page



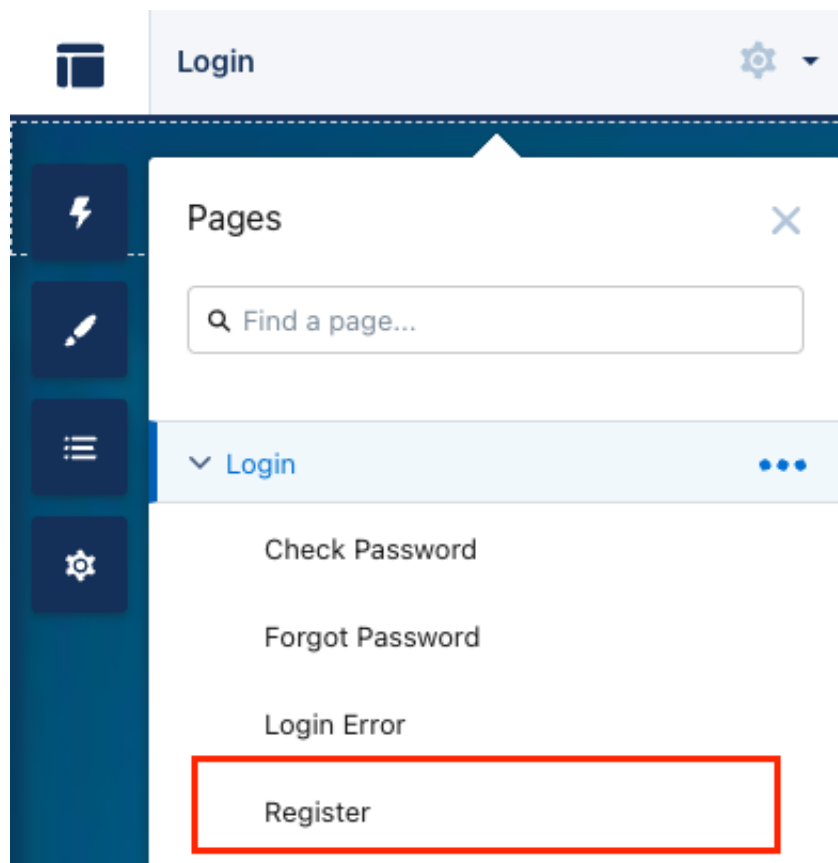
4. Open the Components tab and locate the lwcPasswordlessLogin component



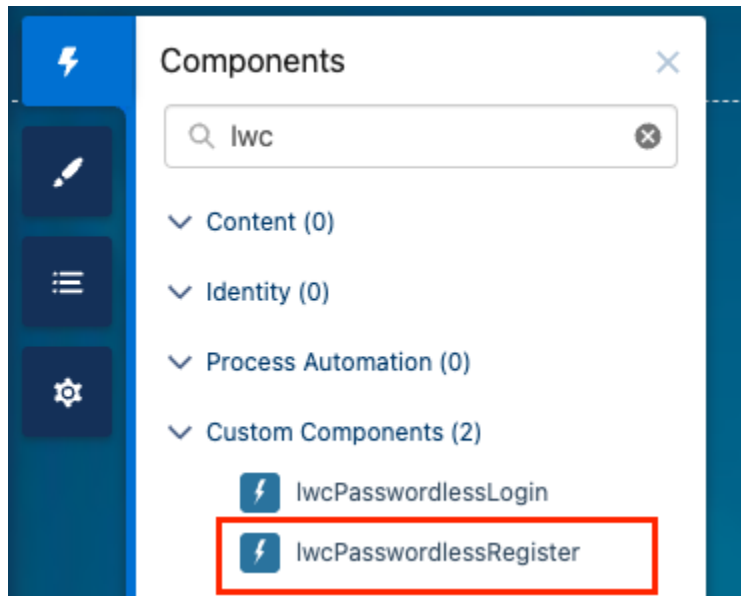
5. Drag and drop in on the Login form.



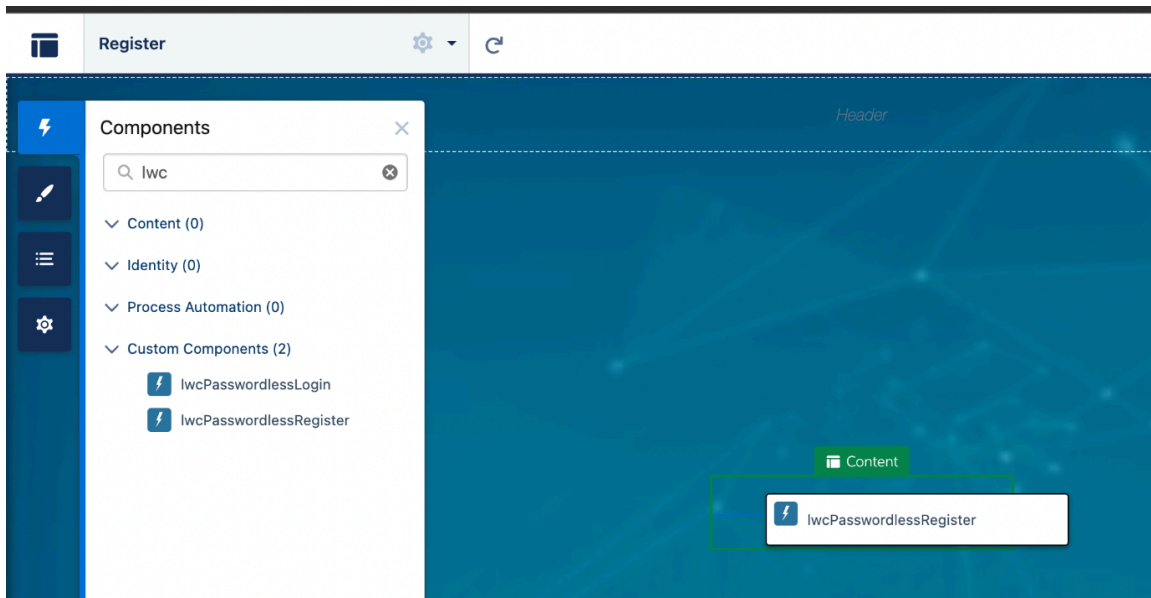
6. Open the Pages menu and open a Login page sub-menu. Click on the Register page.



7. Open the Components tab and locate the lwcPasswordlessRegister component.



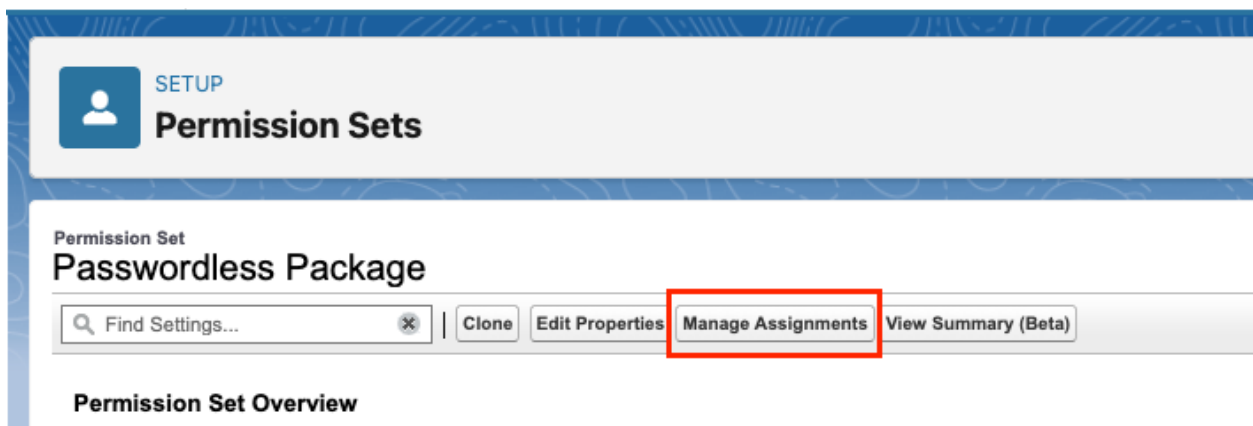
8. Drag and drop in on the Register form.



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).

Login Page Setup

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](#)

Login Page Type Experience Builder Page i

Registration Page Configuration

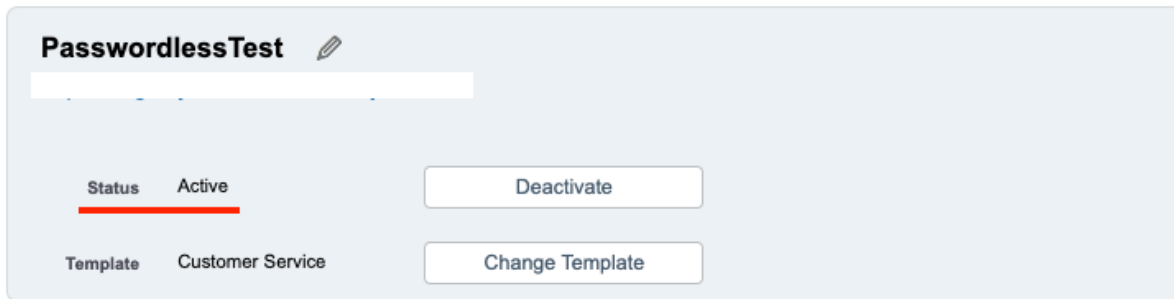
☒ Allow customers and partners to self-register


Choose a self-registration page to let users join your site.

Registration Page Type Experience Builder Page v

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

Settings



PasswordlessTest 

Status **Active** [Deactivate](#)

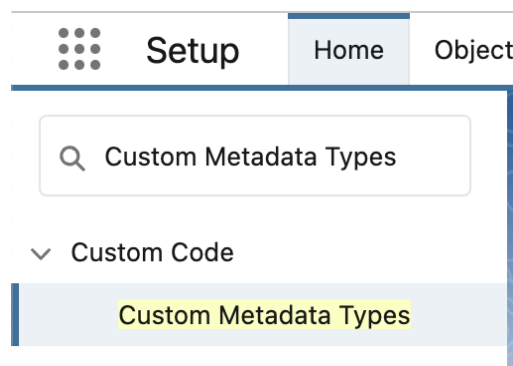
Template **Customer Service** [Change Template](#)


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.



 **Setup** [Home](#) [Object](#)

▼ Custom Code

Custom Metadata Types

3. Open a Custom Metadata Type section.
4. Find the “Passwordless Configuration” custom metadata type. Click on the Manage Records link.

All Custom Metadata Types [Help for this Page](#)

Custom metadata types enable you to create your own setup objects whose records are metadata rather than data. These are typically used to define application configurations that need to be migrated from one environment to another, or packaged and installed.

Rather than building apps from data records in custom objects or custom settings, you can create custom metadata types and add metadata records, with all the manageability that comes with metadata: package, deploy, and upgrade. Querying custom metadata records doesn't count against SQL limits.

New Custom Metadata Type						
Action	Label	Namespace Prefix	Visibility	API Name	Record Size	Description
Manage Records	Passwordless Configuration	snb_pwless	Public	snb_pwless__Passwordless_Configuration__mdt	661	

5. Click a New button

Passwordless Configurations

View: [All](#) [Create New View](#)

[New](#)

Action	Label ↑	Passwordless Configuration Name
--------	---------	---------------------------------

6. Populate fields of the new Custom Metadata Type record

Passwordless Configuration

Passwordless Configuration Edit [Save](#) [Save & New](#) [Cancel](#)

Information

Label	<input type="text" value="PasswordlessTest"/>
Passwordless Configuration Name	<input type="text" value="PasswordlessTest"/> i
Is allowed to populate User Details	<input checked="" type="checkbox"/>
Default Community Profile Name	<input type="text" value="Customer Community L"/>
Network Name	<input type="text" value="pswtst"/>

[Save](#) [Save & New](#) [Cancel](#)

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.

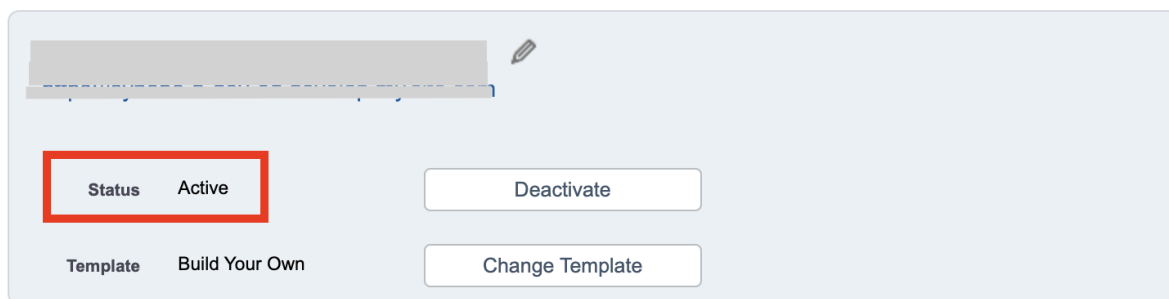
Turning On Basic features for Digital Experiences

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.

Settings



The screenshot shows a settings panel for a Digital Experience site. At the top, there is a blurred header area with a pencil icon for editing. Below this, the 'Status' is set to 'Active', which is highlighted with a red rectangular box. To the right of the status is a 'Deactivate' button. Below the status, the 'Template' is set to 'Build Your Own', and there is a 'Change Template' button to its right.

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".

The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu with options: Home, Object Manager, and a search bar. Below the search bar, the 'Feature Settings' section is expanded, showing 'Digital Experiences' (highlighted in yellow), 'All Sites', 'Pages', 'Settings' (highlighted in blue), 'Templates', and 'Themes'. A red arrow points from the 'Settings' menu item to the 'Role and User Settings' section in the main content area. The 'Role and User Settings' section contains several configuration options:


- Number of customer roles: 1 (dropdown)
- Number of partner roles: 1 (dropdown)
- Allow editing of the Partner Account field on opportunities and leads: ☐
- Enable Partner Super User Access: ☐
- Enable report options for external users: ☐
- Let customer users access notes and attachments: ☐
- Allow customer users to change case statuses: ☐
- Allow users to see contacts that have not been enabled for partner or customer accounts: ☐
- Allow using standard external profiles for self-registration, user creation, and login: ☒**
- Hide badges from guest users in Experience Builder sites: ☒

The 'Allow using standard external profiles for self-registration, user creation, and login' option is highlighted with a red box. Below this section is the 'Moderation Rule Settings' section.

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.

 **Administration**

Passwordless Test

Settings

Preferences

Members

Contributors

Login & Registration

Emails

Pages













Rich Publisher Apps

URL Redirects

We strongly recommend including your company's physical address to comply with applicable anti-spam laws.

[Preview](#)

Email Templates

* Welcome New Member	<input checked="" type="checkbox"/> Send welcome email
	<div>Experience Cloud: New Member Welcome Email </div> <p>Welcome emails are sent once the Experience Cloud site is activated, and then whenever a member is added.</p>
* Forgot Password	<div>Experience Cloud: Forgot Password Email </div>
* Change Password	<div>Experience Cloud: Changed Password Email </div>
Case Comment	<div><input type="text"/> </div>
User Lockout	<div><input type="text"/> </div>
One-Time Password	<div>Custom One-Time Password Email </div>
Old Email Address Change Verification	<div><input type="text"/> </div>
New Email Address Change Verification	<div><input type="text"/> </div>
Device Activation Verification	<div><input type="text"/> </div>
Self-Registration Micro-Batch Error	<div><input type="text"/> </div>
One-Time Password For Headless Forgot Password Flow	<div>Experience Cloud: One-Time Password Email fc </div>
One-Time Password For Headless Registration	<div>Experience Cloud: One-Time Password Email fc </div>

Save

Cancel