

How to Create an Account Contact and Community Portal (Experience Portal) User

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Experience Portal Configuration

The Bold Group Experience Portal (formerly Community Portal) can be found at <https://boldgroup.my.salesforce.com/>. The portal is where customers can submit cases for support from Bold Group staff.



An SFDC Experience Portal login is required to access the portal. Experience Portal logins are managed and assigned by the Customer Support team.

Before a Bold Group Experience Portal account can be provisioned, an Account Contact or an Account Related Contact must first be created.

Create an Account Contact

1. Log in to Salesforce
2. Navigate to the desired Account
3. Click on the **Related Contacts** link in the Related List Quick Links section on the account page
 - ▣
4. If the contact does not currently exist in the list displayed, click the **New Contact** button
 - ▣
5. Enter the required information to the displayed form. The following fields are required:
 - First Name
 - Last Name
 - Title
 - Email
 - Phone Number
 - Contact Type (for support portal users, this should be set to Authorized Service Contact)



All fields in this form **MUST** be specific to the user. Do not create Contacts with generic or shared credentials. All email addresses must be unique and specific to the Contact.

6. Click the Save button to save your new Contact.

Provision the Bold Group Experience Portal account

Due to the potentially sensitive nature of case submissions from customers, the Experience Portal has been set up to allow for varying levels of permissions for Cases and Dashboards:

1. Cases

- a. Users can only see the cases they are listed as a contact on (appropriate for Individual Contributors or staff at the customer site).
- b. Users can see all cases related to their account (appropriate for managers with authority at the customer site).
- c. Users can see cases for all accounts that are on the related accounts list for the contact (assigned in the rare case when a contact is associated with other customers).

2. Dashboards

- a. No dashboard access.
- b. See a dashboard that shows all cases for the account to which their contact is assigned.
- c. See a different dashboard for all cases for the account to which their contact is assigned as well as any accounts that are on the contact's Related Account list.

Profiles

Contacts must be assigned to one of the four profiles below to access the Experience Portal. If a user is assigned a profile that is not one of the profiles below, they will *not* be able to successfully log in to access the Experience Portal.

Bold Customer Community Login Manager	Customer Community Login
Bold Customer Community Login User	Customer Community Login
Bold Customer Community Plus Member	Customer Community Plus
Bold Customer Community Plus Member - Expanded	Customer Community Plus

Pricing

To keep costs* manageable, we have two license types that allow users to access the Experience Portal = Customer Community Login and Customer Community Plus.

License Type: Customer Community Login

Applies to Profiles: Bold Customer Community Login Manager, Bold Customer Community Login User

- \$0.47 x number of days a user has logged in per month.
- Can submit cases but no dashboard access.
- Best for infrequent experience portal users.
- 18,800 login licenses available - **when in doubt, provision this license.**

License Type: Customer Community Plus

Applies to Profiles: Bold Community Community Plus Member, Bold Customer Community Plus Member - Expanded

- Flat \$3.50 user/month (even if they don't log in).
- Can submit cases and has dashboard access.

- Recommend limiting to one person per customer account to make sure that we are not overprovisioning.
- 250 total licenses available.

*Pricing and license count is current as of 2023.

Portal Account User Settings

When creating a new Community User, most of the fields are already filled in as they were entered when creating the Account Contact. The following items will need to be set:

1. User License
 - 99% of the time this field is defaulted to Customer Community Plus and will need to be changed to Customer Community Login
2. Profile
 - Based on the chart below, select the appropriate profile

The chart below can help determine which profile to assign to a User based on the desired Dashboard and Case settings.

		Dashboard Access		
		No Dashboard	Cases Dashboard	Related Accounts Cases Dashboard
Case Visibility Setting	Only see cases where listed as a contact	Bold Customer Community Login User	-	-
	See all cases submitted by the account	Bold Customer Community Login Manager	Bold Customer Community Plus Member	
	See all cases submitted by the account as well as related accounts	-	-	Bold Customer Community Plus Member - Expanded

the user license selected in Step 1 was Customer Community Plus as the Account Contact requires Dashboard access and the profile selected in Step 2 was either Bold Customer Community Plus Member or Bold Customer Community Plus Member – Expanded, you will need to select the dashboard option appropriate to that profile:

- Scroll down to the Additional Information section of the form and click the checkbox to select either:
 - Show Customer Dashboards
 - Show Expanded Customer Dashboards

4. When all selections are confirmed, scroll to the top of the page and click the Save button.



Note that if either of the Community Plus profiles are selected when the account is saved, there is no way to "downgrade" the user to a Community Login user profile. If there is a question as to which profile to select, always default to Bold Customer Community Login Member.

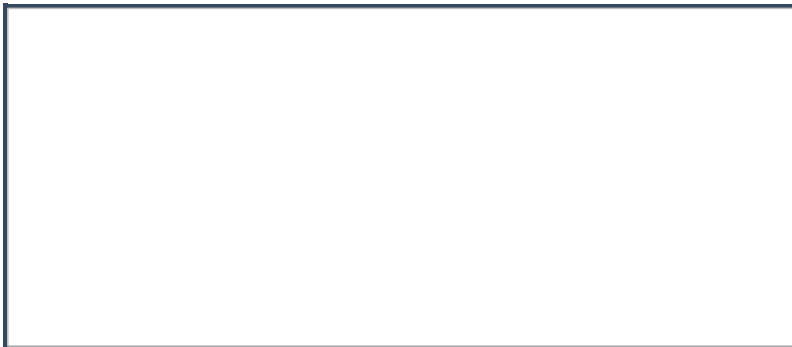
Dashboards

[Cases by Account Dashboard](#)

[Community Expanded Dashboard](#)

The Cases by Account dashboard is the dashboard that Community Users with the "Show Customer Dashboard" checkbox enabled will see when they log into the portal. It will show all cases for the account to which their contact is assigned.

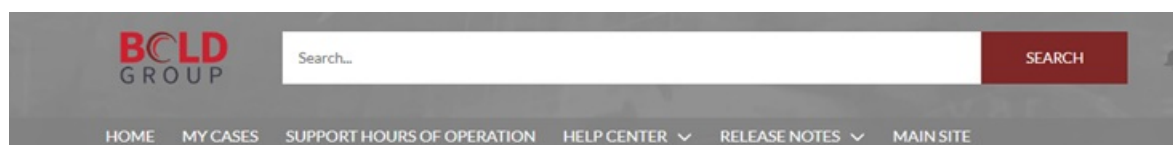
The Community Expanded dashboard is the dashboard Community Users with the "Show Expanded Customer Dashboard" checkbox enabled. It will show all cases for the account to which their contact is assigned as well as any accounts that are on the contact's Related Account list.



Note that both "Show Customer Dashboard" and "Show Expanded Customer Dashboard" checkboxes cannot be enabled at the same time. An error message will appear if the user account is saved and both boxes are enabled.

User Experience

There are two Navigation Menus in the Community Portal that appear to Community Users depending on their profile and the dashboard checkboxes on their User record. The Default Navigation menu looks like this:



And the "View Customer Dashboard" and "View Expanded Customer Dashboard" menus look the same. The difference between the two menus is that the "Case Dashboard" tab will take the User to a different dashboard depending on the settings on their User record.

