

Add Authentication to the Public Store Front



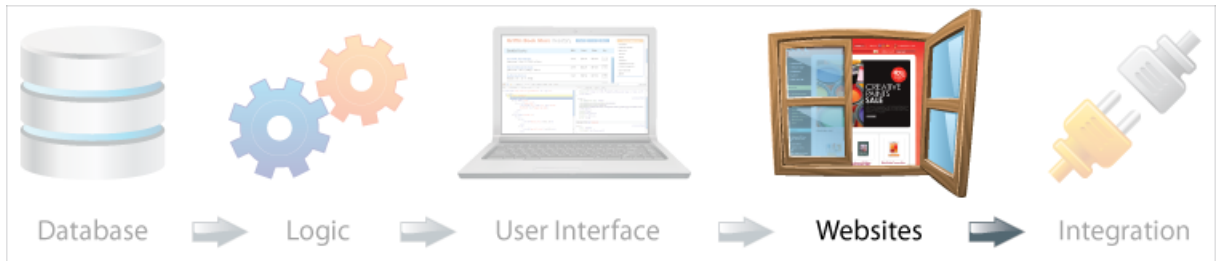
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Add Authentication to the Public Store Front

Level: Intermediate; **Duration:** 30 minutes



A common use case for a public website is an online store. Anyone can visit the store and browse the merchandise without logging in or providing any information. To let customers make purchases, however, you need a secure environment. Associating a portal with a site lets you invite public users into an authenticated environment where you can gather personal information, collect payments, and track user behavior—none of which you can do from a public site alone.

Force.com provides the tools necessary to bring site visitors seamlessly into an authenticated environment. In this tutorial, you will set up a customer portal and integrate it with your site, making it easy for public users to become authenticated users.

Prerequisites

Force.com Sites Tutorial

You first need to complete Tutorial #9: Creating a Store Front, in the Force.com Workbook.

Step 1: Create a Security Profile

Public and authenticated users have different levels of access, defined by different user profiles. Before you set up the portal, you must first define the user profile that controls the access level for users logging in to the portal from the public site. In this step, you clone an existing profile, which you modify in a later step.

1. Click **Setup** ► **Manage Users** ► **Profiles**.
2. Select the Customer Portal Manager.
3. Click **Clone**.
4. In the **Profile Name** field, enter **Store Portal User Profile**.
5. Click **Save**.

The screenshot shows the 'Clone Profile' dialog box. The title bar reads 'Clone Profile'. Below the title bar, there is a prompt: 'Enter the name of the new profile.' The dialog contains the following information:

Existing Profile	Customer Portal Manager
User License	Customer Portal Manager
Profile Name	Portal Manager Profile

At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

Step 2: Enable the Customer Portal

To integrate your site with a customer portal, you first need to enable the customer portal functionality, then you need to set self-registration defaults.

1. Click **Setup** ► **Customize** ► **Customer Portal** ► **Settings**.
2. Click **Edit**, select **Enable Customer Portal**, and then click **Save**.
3. Click **Continue** and then click **Cancel**.
4. Click **Edit** next to your new customer portal.
5. In the `Administrator` field, click the lookup icon and select the administrator user you log in as.
6. Under the Self-Registration Settings, make the following changes:
 - Select `Self-Registration Enabled`.
 - In the `Default New User License` picklist, select `Customer Portal Manager`.
 - In the `Default New User Role` picklist, choose `User`.
 - In the `Default New User Profile` picklist, choose the `Store Portal User` profile you created in the previous step.

7. Click **Save**.

Tell Me More....

The default license, role, and profile are applied to every new user who registers for the portal from the public site. This ensures that self-registered users are granted the level of access that you define. In a later step, you create an account that all new users are associated with.

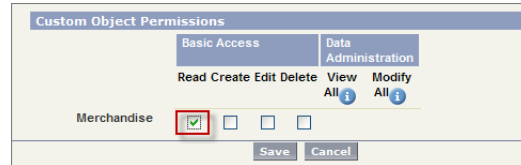
Step 3: Grant Permissions to Users

Now that you've created a user profile and enabled the portal, you need to give portal users access to the `Merchandise` object. To do this, edit the object to make it available to portals, then modify the profile permissions so that portal users have access.

1. Click **Setup** ► **Create** ► **Objects**.
2. Click **Edit** next to the `Merchandise` object.
3. Scroll to `Optional Features` and select `Available for Customer Portal`.
4. Click **Save**.

Now, configure the profile.

1. Click **Setup** ► **Manage Users** ► **Profiles**.
2. Click the `Store Portal User` profile you created, and then on the detail page, click **Edit**.
3. Scroll to the `Custom Object Permissions` section and select the `Read` box for the `Merchandise` object.



4. Click **Save** to return to the detail page.
5. Scroll to the Enabled Visualforce Page Access section and click **Edit**.
6. Select the **StorePortal** page, click **Add** and then click **Save**.

Tell Me More....

On your public site, all users can view merchandise. Because authenticated users are governed by a different profile, you need to explicitly grant them access to the records you want them to see. Without this step, authenticated users wouldn't be able to see any merchandise!

Step 4: Associate the Portal with Your Site

Now that you've enabled the customer portal, you need to associate that portal with your site.

1. Click **Setup** ► **Develop** ► **Sites**.
2. Click on the **Catalog** site.
3. Click **Login Settings**.
4. Click **Edit**.
5. In the `Enable Login For` picklist choose **Customer Portal**. Click **Save**.

Tell Me More....

Browse to your site's URL and notice that your site now contains new login and registration links in the page header. The system automatically created the Visualforce pages and Apex classes necessary to integrate with the customer portal. You'll see a few new pages in the Site Visualforce Pages section of the Site Details page, including SiteLogin, SiteRegister, and SiteRegisterConfirm. The SiteTemplate page is always there, regardless of portal setup.

Step 5: Create an Account for New Portal Users

In a previous step, you enabled self-registration for the customer portal so that Sites users can register as authenticated users. When a public user self-registers, a new user record is created. In this step, you designate an account to associate with those new users, then add that account's ID to the Apex class that controls self-registration. By creating one account for all your portal users, you can track customer information more easily.

1. In the application list, select **Sales**. You will see a number of new tabs that are related to **Accounts**.



2. Click the **Accounts** tab.
3. In the **View** picklist, select **All Accounts**.

4. Select one of the accounts. The URL in the browser takes the form `https://na1.salesforce.com/001A0000002UUnX`. The last 15-digit string is the unique ID of the account record that you selected. Select and copy that ID string.
5. The customer portal requires that the owner of the account be associated with a role to control what new users can and can't see. In this case, let's assign the CEO role.
 - a. Select the Account Owner of the Account record that you're viewing.
 - b. In the User detail page, click **Edit**.
 - c. In the `Role` picklist, select CEO and then click **Save**
6. Click **Setup** ► **Apex Classes** and select **SiteRegisterController**.
7. Click **Edit**.
8. Paste in the ID, overwriting the current value of the `PORTAL_ACCOUNT_ID`. Your variable will look something like this

```
private static Id PORTAL_ACCOUNT_ID = '001A0000002UUnX';
```

9. Click **Save**.

Step 6: Test the Portal

Now you can test the portal by attempting to view the Store Portal page on your public website before and after logging in.

1. Navigate to your store front using your public URL, for example:
`http://workbook2009-developer-edition.na7.force.com/StoreFront`. You will see a page that requires you to log in. Your portal is in operation!
2. Since this is the first time you're visiting the site, you need to create a new user, so click the **New User?** link.
3. Enter values for the username, nickname, email, and password.
4. When the new user is created, you are redirected to your StoreFront page. Now you can purchase merchandise.

Summary

This tutorial has covered everything from sites and portals, to profiles and object permissions—and even touched on Apex controllers—illustrating how powerful and configurable sites can be when you integrate it with other Force.com functionality. By taking advantage of the built-in login and registration logic, you can easily associate a public site with a customer portal, making it easy for visitors to become customers. And by configuring the roles, profiles, and permissions, you create a secure, controlled, authenticated environment. With Force.com, you can create an endless variety of websites and applications using your data.