Salesforce Communities Managers Guide

Salesforce, Winter '19

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MANAGE YOUR COMMUNITIES FOR SUCCESS

Monitoring and managing your community is the key to ensuring the community is a success.

This guide is intended to introduce you to the roles that help ensure a community is successful, and the tools that they can use to achieve that success.

Great communities don't just happen; there are many people involved, from the designer to the implementer to the developer who performs customizations. But once a community is up and running, the community manager and moderator are crucial to making sure it succeeds. These two roles combined help to ensure that the community is:

- Active: Members are logging in regularly
- Engaged: Members feel motivated to actively participate on a regular basis
- Healthy: Member are posting, commenting, and sharing appropriate and helpful information. Inappropriate information or files are removed.

COMMUNITY MANAGERS, MODERATORS, AND ADMINS WORKING TOGETHER

Communities can thrive when community managers, moderators, and admins understand their unique roles and work together effectively.

A community manager and moderator work hand-in-hand. They are partners and support one another in fostering engagement and harmony in the community. Sometimes, they perform some of the same tasks, but each has unique contributions. While the community manager is typically responsible for monitoring adoption and engagement, the moderator is typically responsible for ensuring the community is a healthy environment and that members feel encouraged to be active and helpful to each other.

Community managers, moderators, and admins all work together to protect, engage, and measure community success.
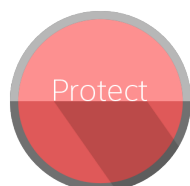
Protect

Prevent spammers, bots, and trolls from attacking the community.

Protect the community from trademark infringement and legal issues.

Ensure community members use appropriate language and adhere to the terms of use.

Engage

Welcome new members, add contributors, and connect members with resources.

Help ensure that members questions are answered quickly.

Acknowledge helpful members and thank them.

Identify, encourage, groom, and retain MVPs.
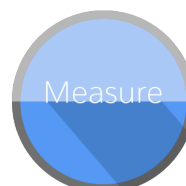
Measure

Review analytics on community health.

Measure return on investment (ROI) and key performance indicators (KPI), such as money saved and cases deflected.

Identify and track community trends.

Assign a Community Manager

To assign a user as a community manager, simply give them the "Manage Communities" permission.

Assign a Community Moderator

Make one or more people moderators in your community so they can keep an eye on its content.

Assign a Community Manager

To assign a user as a community manager, simply give them the "Manage Communities" permission.

Community managers must be employees of your organization; external community members can't be community managers. To assign a user as a community manager, give them the "Manage Communities" permission. With this permission, they can access the Community Management page or Community Workspaces.

📝 **Note:** Go to **Communities Settings** to enable Community Workspaces.

1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**, then click **New**.

2. Create a permission set that includes the "Manage Communities" permissions.

3. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.

4. Find the user you want to be a community manager and add the permission set to their Permission Set Assignments related list.

The user can now manage the community through Community Management or Community Workspaces.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

Assign a Community Moderator

Make one or more people moderators in your community so they can keep an eye on its content.

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management and Community Workspaces. External users who are moderators can moderate within context of the community, such as directly in the community feed.

You can assign moderators by assigning a permission set that includes one or more of following moderation permissions.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

Permission	Allows Users To
Moderate Communities Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Moderator options for feed content are available in the community feed and in Community Management and Community Workspaces.
Moderate Communities Files	Review flagged files they have access to and take action, such as removing flags or deleting the file. Moderator options for files are available on a file's detail page and in Community Management or Community Workspaces.
Moderate Communities Chatter Messages	Review flagged messages and take action, such as removing a flag or deleting a message. This permission allows users access to only flagged messages in communities they're a member of.
Can Approve Feed Post and Comment	Approve, delete, or edit posts and comments that are pending review.

Permission	Allows Users To
Moderate Community Users	Freeze external users who are members of the community. Moderators can freeze members on their user profile page or from an Insights report.
Manage Communities	Moderate community content in Community Management or Community Workspaces.
Access Community Management	Access community pages from Community Management and Community Workspaces

You can also add these permissions to a profile. These permissions are valid for all communities the user is a member of, but don't apply in your internal organization.

1. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**, then click **New**.

2. Create a permission set that includes the appropriate permissions.

3. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.

4. Find the user you want to be a community moderator and add the permission set to their Permission Set Assignments related list.

After you grant moderator permissions to a user, keep these things in mind:

- The user can now moderate any items they have access to in all communities they're a member of.
- The user can flag items even if `Allow members to flag content` is disabled in a community.
- Moderators can receive an email notification when a post, comment, or file is flagged by selecting the `Flag an item as inappropriate` email notification.

Access to moderator functionality is slightly different depending on user permissions:

- **In the community feed**: Both internal and external users with the "Moderate Communities Feeds" permission can view flag indicators directly in the community feed for posts and comments and decide to either remove the flags or delete the content.
- **In Community Management** and **Community Workspaces**: Only internal users with the "Manage Communities" or "Create and Set Up Communities" permission can access the **Moderation** area.

THE ONE-STOP SHOP: COMMUNITY MANAGEMENT

Community Management Overview

Set up and monitor your community from Community Management orCommunity Workspaces. You can manage basic setup information including membership and branding, dashboards, reputation levels and points, and topics.

Community Management and Community Workspaces give community administrators, managers, and moderators a central place to monitor the health of their community and its members.

🛑 Important: The options available in Community Management or Community Workspaces are based on your community template selection, permissions, and preferences. For example, if your community doesn't use topics, you don't see the Topics section. Some options in the following list might not appear in your community by default. To display all sections, go to **Administration** > **Preferences** and enable **Show all settings in Community Management** or **Show all settings in Community Workspaces**.

Access Community Management

Community administrators and managers use Community Management to monitor community activity, and set up other important management features.

1. Access Community Management in one of the following ways.

   - From the community:

     – In Salesforce Tabs + Visualforce communities, click ⚙ in the global header.

     – In Community Builder-based communities, use the drop-down menu next to your name and click **Community Management**.

   - From Setup, enter *All Communities* in the Quick Find box, then select **All Communities** and click the **Manage** link next to a community. To access this page, you need the Create and Set Up Communities" permission.

   - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.

   If your community has Community Workspaces enabled, access that instead and navigate to the Moderation workspace.

2. Choose the part of the community you want to manage:

   📝 Note: The options available in Community Management and Community Workspaces are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you don't see the Topics section. Some of To display all sections, go to **Administration** > **Preferences** and enable **Show all settings in Community Management** or **Show all settings in Community Workspaces**.

   - Preview the community or access your community's settings in the Community Builder, Lightning Platform, or Site.com Studio from Community Management or Community Workspaces.

   - In Engagement, you can view Insights reports and take action on activity in your community.

   - In Dashboards, you can view community dashboards and reports.

   - In Moderation, you can set up moderation rules and monitor flagged feed items.

   - In Topics, you can manage navigational and featured topics.

   - In Recommendations, you can set up custom recommendations to appear in your community.

   - In Reputation, you can set up reputation levels and points.

   - In Administration, you can customize your community properties, such as name, description, URL, status, and template. You can also update your community settings, such as members, tabs, branding, login and registration, and emails.

Get Started with Communities Dashboards and Insights

Dashboards in Community Management and Community Workspaces provide essential reports for managing your communities. Insights help you drill down to the source of activity and take action.

Let us do the hard work for you!

1. Install the Salesforce Communities Management package and get preconfigured dashboards and Insights.

2. Check out your new mapped pages. Click Dashboards and Engagement in Community Management or Community Workspaces.

Don't be afraid to customize the preconfigured dashboards and Insights to fit your community's needs. You can edit the source reports or dashboards at any time.

Alternatively, create your own dashboards and Insights.

1. Create custom dashboards and custom Insights.

2. Map those dashboards and Insights in Community Management or Community Workspaces.

Report on Communities with the AppExchange Packages for Community Management

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Community Management or Community Workspaces.

Use the Salesforce Communities Management package to:

- Take advantage of the newest features using preconfigured reports (use the latest package version)
- View the latest metrics and rapidly spot trends
- Determine how fast your community is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas in your community that need attention
- Take immediate action on recent activity with Insights reports

> **Note:** To use the preconfigured Insights reports, your community must use Chatter.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To install AppExchange packages:
- Download AppExchange Packages

During installation, dashboard and report folders are automatically installed in your internal org. You'll also have the option to give your community managers access to the package contents so you don't have to share the dashboard and report folders with them later. If you have no previous Insights or dashboards mapped in Community Management or Community Workspaces, they are automatically mapped for you during installation.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Community Management or Community Workspaces, community-specific data is displayed.

Insights for Community Engagement

Insights are reports that help your community managers monitor activity and take action on that activity. Insights make it easier to manage day-to-day moderation tasks, encourage community engagement, and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups, trending topics, and even recent Chatter contributions.

EDITIONS

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👁 **Example:** With an Insights report set up to track new members, community managers can quickly navigate to a new member's profile to send them a welcome message.

They can also access other reports about members directly from the Insights page using the drop-down menu.

💡 **Tip:** Let us do the setup work for you! Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your community must use Chatter.

Insight reports provided in the package are 100% customizable. You can change the default Insights page names, report folder mappings, and even the Insights report columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

Enable and Map Engagement Insights for Community Managers

Community managers can use Engagement Insights reports to monitor recent activity and take action on that activity. To get up and running quickly, use preconfigured Engagement Insights from an AppExchange package. You can also create and map your own. Each community can have their own Engagement Insights.

Create Your Own Insights for Your Community

Create your own Insights to display in Community Management or Community Workspaces. We recommend that you create your Insights reports based on custom report types available for communities.

Create Custom Actions for Community Insights

Do more with community Insights reports with custom actions. Say a spammer attacks your community. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

View and Customize Engagement Insights for Your Community

Use Engagement Insights in to monitor recent community activity and immediately take action. EngagementInsights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your community.

Enable and Map Engagement Insights for Community Managers

Community managers can use Engagement Insights reports to monitor recent activity and take action on that activity. To get up and running quickly, use preconfigured Engagement Insights from an AppExchange package. You can also create and map your own. Each community can have their own Engagement Insights.

Engagement Insights pages map to report folders in your internal org. All the reports included in that folder are displayed in the dropdown menu on the Engagement Insights page. Adding or removing an Engagement Insights report from the report folder in your internal org updates the Engagement Insights page in Community Management or Community Workspaces. On the Engagement Insights page, links are automatically created for report fields such as `Created By` or `Group Name`. For posts, comments, and messages, you can even see the contents directly on the page.

> 💡 **Tip:** Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your community must use Chatter.
>
> When you install the package, report folders are automatically installed in your internal org. If you have no previous Engagement Insights mapped, the package automatically maps them for you. You can change the default mappings at any time.

To map or update Engagement Insights for your community:

1. Open Community Workspaces or Community Management.

2. Click **Engagement** > **Settings**. If you are using Community Workspaces, click **Engagement** > **Settings** from the Dashboard workspace.

3. Provide a name for each Engagement Insights page and then select the report folder you want to map to the page.

   You can map up to 10 Engagement Insights pages.

   Make sure that you have shared the mapped report folder with your community managers or they can't view the Engagement Insights reports.

4. Click **Save**.

   Engagement Insights pages are visible to community managers when they expand the Engagement section in Community Management or Community Workspaces.

Go check out your changes. Click Engagement and then click each Engagement Insights page name. Use the dropdown menu to verify the reports mapped to each page.

EDITIONS

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Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To map Engagement Insights in Community Management or Community Workspaces:

- Manage Communities OR Create and Set Up Communities

  AND

  Manage Reports in Public Folders

  AND

  Is a member of the community

If you installed the Salesforce Communities Management package, moderation-related Engagement Insights reports are also mapped to pages in the Moderation section of Community Management or in the Moderation workspace of Community Workspaces. Unlike the page names in the Engagement section, the page names in the Moderation section can't be renamed or unmapped.

Create Your Own Insights for Your Community

Create your own Insights to display in Community Management or Community Workspaces. We recommend that you create your Insights reports based on custom report types available for communities.

> 💡 **Tip:** Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your community must use Chatter.

1. Create custom report types based on the Networks object.

   Only reports that are based on the Networks object show community-specific information in Community Management and Community Workspaces.

   > 📝 **Note:** You can create reports based on other objects and expose them in Community Management or Community Workspaces. Keep in mind that they show data from across your organization, not just for the community in which you're viewing them.

   • Select Networks as the primary object.
   • Select a child object:
     – Chatter Messages
     – Feed Revisions
     – Groups
     – Network Audits
     – Network Activity Daily Metrics
     – Network Feed Revisions
     – Network Members
     – Network Membership Daily Metrics
     – Network Moderations
     – Network Public Usage Daily Metrics
     – Network Unique Contributor Daily Metrics
     – Recommendation Metric
     – Topic Assignments
     – Topics
     – Unpublished Feed Entities

2. Use the custom report type to create an Insights report.

   Insights reports are just like any other report, except they must also meet the following requirements:

   • The report must be a tabular report.
   • The report can't include pagination.
   • We recommended that your report only return 2,000 rows or less because only the first 2,000 rows are displayed in Community Management or Community Workspaces.

- To view "Approve" and "Delete" comment actions, you must add the FeedCommentID column to your Insights report.

Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

3. Save the report to a new report folder that you can map to in Community Management or Community Workspaces.

We recommend that you create a separate report folder for each of your Insights pages. For example, create one report folder called `Insights Members` and another called `Insights Moderation`.

Engagement Insights pages map to report folders in your internal org. All the reports included in that folder are displayed in the dropdown menu on the Engagement Insights page. Adding or removing an Engagement Insights report from the report folder in your internal org updates the Engagement Insights page in Community Management or Community Workspaces.

4. Share your Insights report folder with your community managers.

5. In Community Management or Community Workspaces, click **Engagement** > **Settings** to map Insights pages to your report folder.

When a community manager accesses Community Management or Community Workspaces, the Insights reports appear in the drop-down menu on the mapped Engagement page.

> **Note:** Some Insights are not available in Developer Edition or sandbox orgs.

Create Custom Actions for Community Insights

Do more with community Insights reports with custom actions. Say a spammer attacks your community. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

When you click an Insights action in the report, behind the scenes a Visualforce page drives the action. The Visualforce page links to standard or custom objects using standard controllers or standard list controllers.

Here are the high-level steps of how to create a custom Insights action:

1. Create a Visualforce page.

There are a few options you can use:

- Use a standard controller

Choose this option to create a Visualforce page that contains the same functionality and logic used in standard Salesforce pages. For example, if you use the standard Accounts controller, clicking a **Save** button in a Visualforce page results in the same behavior as clicking **Save** on a standard Account edit page.

- Use a standard list controller

Choose this option to create a Visualforce page that can display or act on a set of records. Examples of existing Salesforce pages that work with a set of records include: list pages, related lists, and mass action pages.

- Use a controller extension that uses Apex

Choose this option if you want to expose new functionality, customize the navigation through an application, use callouts or Web services, or if you need finer control for how information is accessed for your page.

All options work with standard objects and custom objects.

For detailed information about these options, see the Visualforce Developer Guide.

2. Add your custom action to the Insights report.

Actions are displayed based on the data returned in the report. Make sure that you have a report that is currently returning the data your action needs.

a. Open Community Workspaces or Community Management.

b. Navigate to the Insights report that you want to apply your new custom action to.

c. On the report, click ⚙ and then add your custom action from the picklist.

3. Ensure that your users have the correct permissions to complete your custom action.

Depending on how you set up your custom action, after the action is executed, the user either stays on the Insights page or is redirected to a page in your internal org. Unlike our standard Insights actions, users don't receive the standard success or failure message for custom actions.

👁 **Example:** Here's an example of a custom action to delete all activity from a community member. This custom action is great for cleaning up the community after a spam attack.

Create a custom controller extension using an Apex class and use it in your Visualforce page. The following `DeleteAllActivityControllerExtension` class is an example of a custom controller extension.

```
public with sharing class DeleteAllActivityControllerExtension {

    private List<Id> ids;
    private String retURL;
    private Database.DeleteResult[] deleteResult = null;
    private Map<String, String> resultMap;
    private String success = 'success';
    private String failure = 'failure';

  public DeleteAllActivityControllerExtension(ApexPages.StandardController controller)
 {
        resultMap = new Map<String, String>();
        /* The IDs you select on the Insights page are stored in a comma separated
string of IDs.
        This string is passed in a parameter called "idsList" */
        String idsList = ApexPages.currentPage().getParameters().get('idsList');
        //The return URL to the Insights page is passed in a parameter called "retURL"

        retURL = ApexPages.currentPage().getParameters().get('retURL');
        ids = idsList.split(',');
    }

    public PageReference deleteAllActivity() {
        deleteFeedPosts();
        deleteFeedComments();
        //Include these two lines of code to be redirected to the Insights page after
 you click the action.
        PageReference retPage = new PageReference(retURL);
        retPage.setRedirect(true);
        Integer failureCount = calculateFailureCount();
        Integer successCount = ids.size() - failureCount;
        retPage.getParameters().put(success, String.valueOf(successCount));
```

```
            retPage.getParameters().put(failure, String.valueOf(failureCount));
            return retPage;
    }

    private void deleteFeedPosts() {
        List<FeedItem> feedItems = [Select Id, CreatedById FROM FeedItem WHERE
CreatedById IN :ids];
        deleteResult = Database.delete(feedItems, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedItems.get(i).CreatedById),
failure);
                    }
                }
            }
        }
    }

    private void deleteFeedComments() {
        List<FeedComment> feedComments = [Select Id, CreatedById FROM FeedComment WHERE
 CreatedById IN :ids];
        deleteResult = Database.delete(feedComments, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedComments.get(i).CreatedById),
 failure);
                    }
                }
            }
        }
    }

    private Integer calculateFailureCount() {
        Integer failureCount = 0;
        for (String result : resultMap.values()) {
            if (failure == result) {
                failureCount++;
            }
        }
        return failureCount;
    }

}
```

This code creates a **Delete All Activity** button in your Insights report. This button deletes all posts and comments for any selected members. If you wanted to delete all private messages and files too, you could expand the code.

> ✎ **Note:**
> - This code example doesn't include any permission checks. This custom action only works for admins.
> - The IDs for the items you selected on the Insights report are passed to the Visualforce page using the `idsList` parameter.

The following Visualforce markup shows how the custom controller extension can be used in a page:

```
<apex:page standardController="User"
extensions="DeleteAllActivityControllerExtension" action="{!deleteAllActivity}"
/>
```

View and Customize Engagement Insights for Your Community

Use Engagement Insights in to monitor recent community activity and immediately take action. EngagementInsights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your community.

Each Engagement Insights page includes multiple reports. You can access these reports using the dropdown menu on the page. On the Engagement Insights page, links are automatically created for report fields such as `Created By` or `Group Name`. For posts, comments, and messages, you can even see the contents directly on the page.

Engagement Insights are powerful tools that you can use to perform mass-actions. For example, if a spammer attacks your community, you can select all the offending posts and click **Delete Post**.
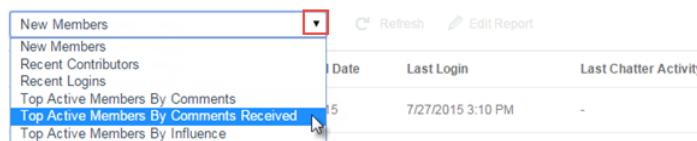
> ⊘ **Important:** Some Engagement Insights actions require special permissions. If you can't perform an action, let your admin know.

1. Open Community Workspaces or Community Management.
2. Click Engagement or Moderation.

   > ✎ **Note:** Your admin maps Engagement Insights pages. If the Engagement section isn't visible or the Moderation section doesn't include any Engagement Insights pages, your admin hasn't mapped them yet.

   Pages with mapped report folders appear when you expand the sections.

3. Click the Engagement Insights page you want to view.
   - To access other Engagement Insights reports, use the dropdown menu.

New Members	▼	C Refresh	✎ Edit Report
New Members			
Recent Contributors		Date	Last Login	Last Chatter Activity
Recent Logins			
Top Active Members By Comments			
Top Active Members By Comments Received		5	7/27/2015 3:10 PM	-
Top Active Members By Influence			

   - Take action! Only the first two actions are displayed on the page. To see more actions, click
     ▼ next to the displayed actions. You can select up to 100 rows at a time.
   - To filter the report by relative and custom date ranges, use the dropdown date filter. Select one of the following relative date ranges: All Time, This Week, This Month, Last Month, Today, Yesterday, Last 7 Days, and Last 30 Days. You can also enter your own custom date range.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view Engagement Insights in Community Workspaces or Community Management:
- Access Community Management OR Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

To customize Engagement Insights reports:
- Create and Customize Reports

- To sort the report by a specific column, click the column heading. An arrow on the column indicates whether the report is sorted by ascending or descending order.

- To edit or customize the report, click ✎ to open the report in your internal org. From there you can customize the report to fit your community needs, such as adding or removing columns and updating the report filters.

  Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

- To edit the actions assigned to a page, click ⚙ to open the Edit Engagement Insights Actions page.

  Actions that appear on the Engagement Insights report are displayed based on the data returned in the report. For example, if the report returns data about a user, the **Freeze Member** and **Unfreeze Member** actions are displayed. If the report stops returning data, actions aren't removed. However, when you go to update the actions, we let you know that some are no longer appropriate.

  Each Engagement Insights report can have its own actions. You can edit these actions at any time, but keep in mind that an Engagement Insights report must have at least one action. Actions displayed in the picklist on the Edit Engagement Insights Actions page are all the available and appropriate actions for your report, including custom actions.

Engagement Insights reports for your community are automatically refreshed when you access them. You can also force an update.

Measure Community Success with Dashboards

Use Dashboards to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement, providing you with a high-level view into the health of your community. Dashboards also help you monitor return on investment (ROI) and key performance indicators (KPI).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Enable and Map Dashboards for Community Managers

Community managers can use dashboards in each community to measure its success. You can even map a dashboard to the Community Management or Community Workspaces Home page. You can map custom dashboards or use the ones provided in our AppExchange package.

Create a Dashboard for Your Community

While you can show any dashboard in your community, we recommend creating them based on the custom report types available for communities.

View Community Dashboards.

Use dashboards to monitor the health of your community.

What's the difference between Engagement Insights and dashboards?

Engagement Insights let you take immediate action on recent activity in your community, and the reports in dashboards let you see trends.

Enable and Map Dashboards for Community Managers

Community managers can use dashboards in each community to measure its success. You can even map a dashboard to the Community Management or Community Workspaces Home page. You can map custom dashboards or use the ones provided in our AppExchange package.

You can choose to map any dashboard you have access to, but ensure that your community managers have access as well.

All dashboards display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure you're using a supported browser.

> 💡 Tip: Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

If the Salesforce Communities Management package is installed in your organization, each of the pages has a default mapping to a dashboard from the package. You can overwrite these values as needed.

To map or update your dashboards:

1. Open Community Workspaces or Community Management.

2. Click **Dashboards** > **Settings**.

3. For each of the pages, select the dashboard you want to show to community managers. To change the name of the dashboard page, click inside the dashboard label.

    The dashboard you map to Home displays on your Community Management or Community Workspaces Home page.

4. Click **Save**.

    Dashboards are visible to community managers when they expand the Dashboards section or visit the Home page in Community Management or Community Workspaces.

Verify the dashboard mappings by clicking **Dashboards** and then clicking each page name. If you mapped a dashboard to the Home page, check that out too.

Create a Dashboard for Your Community

While you can show any dashboard in your community, we recommend creating them based on the custom report types available for communities.

> 💡 **Tip:** Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

All dashboards display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure you're using a supported browser.

Open Community Workspaces or Community Management.

1. Create custom report types based on the Networks object.

   Only reports that are based on the Networks object show community-specific information in Community Management and Community Workspaces.

   > 📝 **Note:** You can create reports based on other objects and expose them in Community Management or Community Workspaces. Keep in mind that they show data from across your organization, not just for the community in which you're viewing them.

   - Select Networks as the primary object.
   - Select a child object:
     - Chatter Messages
     - Feed Revisions
     - Groups
     - Network Audits
     - Network Activity Daily Metrics
     - Network Feed Revisions
     - Network Members
     - Network Membership Daily Metrics
     - Network Moderations
     - Network Public Usage Daily Metrics
     - Network Unique Contributor Daily Metrics
     - Recommendation Metric
     - Topic Assignments
     - Topics
     - Unpublished Feed Entities

2. Use the custom report type to create a report.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

3. Create a dashboard with components. Select the report as your source type.

   - Add a component for each report you want to include in your dashboard.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To create custom report types:
- Manage Custom Report Types

To create, edit, and delete reports:
- Create and Customize Reports

To create and share dashboards:
- Manage Dashboards in Public Folders

- Find your report on the Data Sources tab and add it to the component.

For a Salesforce Classic dashboard to optimally render in the Lightning view used in Community Management and Community Workspaces, make sure that your dashboard meets these requirements.

- Includes only up to 20 reports arranged within three columns

- Doesn't include unsupported charts, such as funnel, scatter, table, multi-metric, pie, and gauge

  For a list of dashboard features not supported in the Lightning view, see Reports and Dashboards: Lightning Experience Limitations.

📝 Note: Metrics are supported in the Lightning view, but they display as large tiles. We recommended that you don't include metrics in your dashboards.

4. Share the folder that you save your dashboard in with your community managers.

5. From Community Management or Community Workspaces, click **Dashboards** > **Settings** to map your dashboard.

When a community manager accesses Community Management or Community Workspaces, the dashboard appears under Dashboards. If you mapped a dashboard to the Home page, the dashboard appears there.

Dashboards in Community Management and Community Workspaces are automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

Remember that you can customize your dashboards at any time. To edit your dashboard, go to the **Dashboards** > **Settings** page in Community Management or Community Workspaces. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link doesn't work.

View Community Dashboards.

Use dashboards to monitor the health of your community.

All dashboards display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard. Not all browsers support this Lightning view, so make sure you're using a supported browser.

1. Open Community Workspaces or Community Management.

2. Click Dashboards.

   📝 **Note:** If the Dashboards section isn't displayed, your administrator hasn't mapped them for your community.

   Pages that have dashboards mapped to them appear in the Dashboards section or on the Home page.

3. Click the dashboard page you want to view.
   The dashboard appears. For an immediate refresh of dashboard data, click **Refresh**

   📝 **Note:** The refresh button is not available in Lightning communities accessed through mobile devices.

   .

   Dashboards in Community Management and Community Workspaces are automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

4. To view a related report, click **View Report** on the dashboard.
   Remember that the dashboards are configured to display community-specific data.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

Remember that you can customize your dashboard at any time. To edit your dashboard, go to the **Dashboards** > **Settings** page in Community Management or Community Workspaces. Click into the **Label** field to edit the page name and select the down arrow to the right of the **Dashboard** field to map to a different dashboard. Click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link doesn't work.

What's the difference between Engagement Insights and dashboards?

Engagement Insights let you take immediate action on recent activity in your community, and the reports in dashboards let you see trends.

Use Engagement to view, monitor, and act on your community's activity. Engagement Insights give you a detailed look at a specific area of your community.

Use Dashboards to view your community's metrics, such as trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you

monitor return on investment (ROI) and key performance indicators (KPI).

For example, you can visit the **Engagement** > **Adoption** page to view a report about new members in your community that have received the most likes on their posts and comments. This Engagement Insights report helps you identify and engage with your active new members that are receiving positive feedback from other community members.

For example, you can visit the **Dashboards** > **Activity** page to track total posts and comments including overall contribution trends in your community.

Community Moderation Strategies and Tools

Community moderation allows you to empower members of your community to monitor content and ensure that it's appropriate and relevant. Set up rules to automate moderation and do the heavy lifting for you.

Moderation is crucial for a community to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your community are appropriate and helpful. It's also critical to empower members to speak up when they view something as inappropriate or offensive.

With Communities moderation, you can:

- Designate specific users as moderators so that they can closely monitor the community
- Allow members to flag posts, comments, files, and messages that are inappropriate or spam
- Allow moderators to review and act on flagged items, such as deleting a post, comment, or file
- Allow group owners and managers to moderate within their groups
- Create rules and criteria to automatically block, flag, replace keywords in member-generated content, such as posts or comments
- Create rules to review and approve content from specific members
- Track flagging and moderation activity within your community

To limit the size and types of files allowed in your community, go to **Administration** > **Preferences**.

To report on moderation activity in your communities, you can use the preconfigured Audit Trail Insights report provided in Salesforce Communities Management package. You can also query the flagged content or activity using the API, or create a custom report type

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

using `Networks` as the primary object. For more information about the Salesforce Communities Management package, see Report on Communities with the AppExchange Packages for Community Management.

> **Note:** Changes to a feed item's status are not included in the Audit Trail Insights report.

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

If your org is using Transaction Security, community moderation offers some of the same functionality. Transaction Security and communities moderation can be used at the same time.

Track Community Activity with the Moderation Overview Page

Moderation Insights are arranged in clickable tiles in the Moderation Overview page of Community Management and Community Workspaces. View the entire picture of your community's moderation activity at a glance and take action on day-to-day moderation tasks.

Enable Members to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts, comments, files, and messages that they deem inappropriate.

Community Moderation Criteria

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Community Moderation Rules

Create and modify rules for your community to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your community from spammers, bots, and offensive or inappropriate content.

Review and Approve Posts and Comments in Your Community

Premoderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your community. Posts and comments pending review aren't displayed in the community feed; only the author and community moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the community feed, in Community Workspaces, or in Community Management.

Moderate Flagged Posts and Comments in Your Community

Community moderators can review a list of posts and comments that members of the community have flagged as inappropriate and act on them. Group owners or group managers, can view flags and act on items in their groups.

Moderate Flagged Discussions in Your Community

Community moderators can delete and unflag posts and comments from discussions, and freeze or communicate with the author of those posts, all from one place.

Moderate Flagged Files in Your Community

Community moderators can review a list of files that members of the community have flagged as inappropriate or spam and take action. Group owners or group managers can view flags and take action on files in their groups.

Moderate Flagged Direct Messages in Your Community

Community members can flag messages in communities built using the Customer Service (Napili) template. Community moderators can review and act on a list of direct messages that members of the community have flagged as inappropriate or spam.

Moderate Flagged Private Messages in Your Community

Community moderators can review and act on a list of Chatter messages that members of the community have flagged as inappropriate or as spam.

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your community.

Community Pulse

Community Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create new ones to meet your needs.
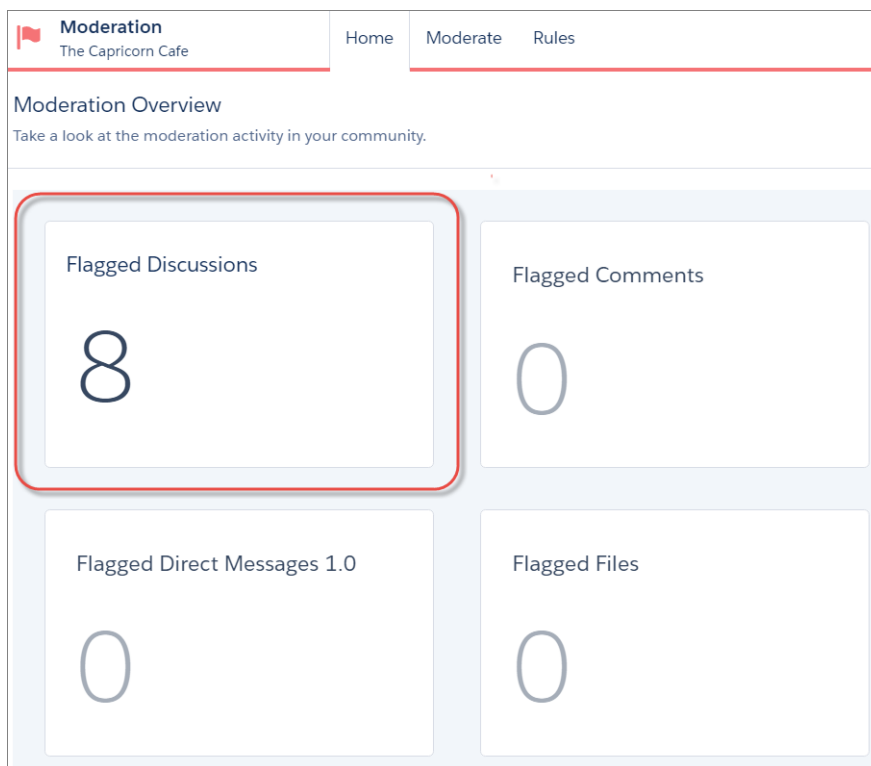
Communities Moderation Limits and Limitations

Community moderation limits ensure that your community performs optimally.

Track Community Activity with the Moderation Overview Page

Moderation Insights are arranged in clickable tiles in the Moderation Overview page of Community Management and Community Workspaces. View the entire picture of your community's moderation activity at a glance and take action on day-to-day moderation tasks.

👁 **Example:** To view all flagged posts and comments, click **Flagged Discussions** and go directly to the Flagged Discussions queue. You can approve or delete flagged posts and comments in bulk, directly from the queue.

💡 **Tip:** Let us do the setup work for you! Get out-of-the-box Engagement Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Engagement Insights, your community must use Chatter.

Insight reports provided in the package are 100% customizable. You can change the default Insights page names, report folder mappings, and even the Insights report columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

Enable Members to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts, comments, files, and messages that they deem inappropriate.

Community moderation must be enabled for your organization before you can allow members to flag content in the user interface. If you don't see the option to allow flagged content, contact your administrator.

This setting isn't required to flag or moderate items using the API.

Once an item is flagged, your community moderator can review it and take action. Remember that moderators can continue to flag items even if flagging is disabled for community members.

1. Open Community Workspaces or Community Management.

2. Click **Administration** > **Preferences**, then select `Allow members to flag content`.

3. Click **Save**.

With this setting enabled in a community:

- Members can flag posts, comments, and files using the `Flag as inappropriate` option.

- Members can flag messages from within the community on their My Messages page in Chatter. If a member has turned on email notification for messages, they can also flag the message directly from their email. Members can only flag messages that are sent from communities they are members of.

    📝 Note: Messages can't be flagged in partner or customer portals, your internal organization, or from the Salesforce app.

- Group owners and managers can moderate groups they own or manage.

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

Community Moderation Criteria

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Plan Your Use-Cases

Before creating your member criteria, think about what you want to do.

- Do you want to protect your community from bots and spammers? Most spammers attack shortly after they've joined. Set up member criteria based on a user's creation date.

- Do you want to review members' first posts? Set up member criteria that targets users without community contributions.

- Do you want to moderate your internal users' activity in your community? Set up member criteria to include only your internal users.

- Do you want to be notified when a partner contributes for the first time? Set up member criteria to include only your partner users that don't have community contributions.

Before creating content criteria, think about what you want to moderate.

- Do you want to moderate profanities and slang? Set up separate keyword lists for each group of related words.

- Do you want to replace competitor product names with asterisks? Create a keyword list just for your competitor products.

- Do you want to monitor content for HIPAA compliance? Create a keyword list that alerts of possible HIPAA violations.

Create Content Criteria to Moderate Your Community

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your community. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

Create Member Criteria to Moderate Your Community

Create and modify member criteria to use in community moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the community. Use member criteria in your rules to help pin-point specific use-cases, like reviewing posts only from your customer users who were created in the last 7 days.

Create Content Criteria to Moderate Your Community

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your community. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

You can also use the Metadata API or Tooling API to set up keyword lists.

Some things to keep in mind:

- Your org can have up to 30 keyword list criteria. This limit is per org, not per community.
- A keyword list can have up to 2,000 keywords.
- Capitalization and trailing punctuation are ignored when matching your keywords to user-generated content. For example, if your criteria includes *BadWord*, it's matched when a user types *BADWORD* or *badword.*

Set up content criteria to use in your moderation rules:

1. Open Community Workspaces or Community Management.

2. If you're using Community Workspaces, access Moderation by clicking **Moderation** > **Content Criteria** > **New**. If you're using Community Management, access Moderation by clicking **ModerationContent Criteria.**

3. Enter a name, unique name, and description for your criteria.

4. Click **Save**.

5. Update the keywords in your criteria.

   To add keywords, click **Add**.

   - Keywords can only be up to 100 characters and can include letters, numbers, spaces, and special characters.
   - Wildcard characters aren't supported.
   - Separate keywords with commas or line breaks.
   - When adding keywords, you can copy and paste up to 32,000 characters at a time.

   💡 Tip: To cover different variations of the same word, you can use special characters and spaces. For example:

   bad-word

   b@dword

   b a d w o r d

   To delete keywords, select the keywords you want to remove, then click **Delete**.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete criteria:

- Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

A message indicates how many keywords were added or failed to add, and the number of duplicates that were ignored. If your entire entry failed to save, review the keyword requirements and then submit again. Don't worry about adding duplicates because they're ignored.

To delete criteria, click **Del** from the Content Criteria page. If criteria is being used by a rule, you can't delete it.

Create Member Criteria to Moderate Your Community

Create and modify member criteria to use in community moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the community. Use member criteria in your rules to help pin-point specific use-cases, like reviewing posts only from your customer users who were created in the last 7 days.

Some things to keep in mind:

- Your org can have up to 100 member criteria. This limit is per org, not per community.
- Each member criteria can include up to 100 user conditions.

You can create criteria that includes only user types and user profiles, or just filters. Or if you want it all, your criteria can include user types, user profiles, and filters. Let's get started.

1. Open Community Workspaces or Community Management.
2. Click **ModerationMember Criteria**, then click **New**.
3. Enter a name, unique name, and description for your criteria.
4. Select the types of user types or user profiles to include in your criteria.

   You can select any combination of types and profiles. Members are included when they belong to *any* one of your selections.

   If you delete a profile in your internal org, the profile is also removed from your member criteria.

5. Select to filter your members by:
   - `None`—Select this option if you don't want to filter the criteria using the other options. None is the default selection.
   - `User creation date`—Select this option to include only users that were created within a specific time frame. Enter the number of days since the user was created.

     📝 Note: A user's creation date might not be the same date they became a member of the community. For example, you can have an internal user that was created 120 days ago who became a member of the community 5 days ago. For users that self-register, their creation date is the date they become a member of the community.

   - `Members without community contributions`—Select this option to include only members that haven't posted or commented in the community. Posts that are pending review don't count as community contributions until they are approved.

   If you selected user types or user profiles, and you also select filter conditions, members are included only if they belong to one of the selected user types or profiles *and* the filter condition.

6. Click **Save** to apply your changes.

   👁 Example: Let's look at the following conditions:

   `User Types`: Partner

   `User Profiles`: Customer Community Plus Login User, Customer Community Plus User, and Customer Community User

`Filter By`: User creation date is set to 7 days since the user was created

This member criteria applies to:

- Partner users created in the last 7 days
- Customer Community Plus Login User created in the last 7 days
- Customer Community Plus User created in the last 7 days
- Customer Community User created in the last 7 days

You can use this member criteria in a rule to:

- Review and approve their posts
- Be notified of their contributions
- Flag all their contributions

To delete criteria, click **Del** from the Member Criteria page. If criteria is being used by a rule, you can't delete it.

Community Moderation Rules

Create and modify rules for your community to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your community from spammers, bots, and offensive or inappropriate content.

<div style="float:right">

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

</div>

Customize Preconfigured Moderation Rules

If your community was created after Spring '17, your community comes populated with preconfigured moderation rules that block, flag, freeze, replace or review banned keywords. Simply activate the rules and they are ready to go. You can customize both the rules and the list of banned keywords.

Create Content Rules to Moderate Your Community

Create and modify rules for your community to moderate member-generated content. Content rules protect your community from offensive language and inappropriate content created by spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

Create Rate Limit Rules to Moderate Your Community

Create and modify rate rules to monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

How and when do community moderation rules execute?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

Enable Record Feed Moderation

Run moderation rules on comments or posts on any record feed that is visible from within a community. Record feed moderation ensures that member posts or comments stay within the guidelines of the community.

Customize Preconfigured Moderation Rules

If your community was created after Spring '17, your community comes populated with preconfigured moderation rules that block, flag, freeze, replace or review banned keywords. Simply activate the rules and they are ready to go. You can customize both the rules and the list of banned keywords.

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.

- Each content rule can have up to 3 keyword criteria and 10 member criteria.

- Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last the rules that flag content. If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content.

- Moderation rules apply only to feed posts, comments, and polls. Moderation rules do not apply to topics that are created.

1. Open Community Workspaces or Community Management..

2. Click **Moderation** > **Rules** > **Moderation Rule**, then click **Edit** next to the rule that you want to modify.

3. If the rule meets your requirements, simply click **Activate**. Or you can customize the following fields:

   - **Name**—Change the name of your rule.

   - **Unique Name**—Enter a unique name for your rule. The unique name used by the API.

   - **Description**—Optionally, change the description.

   - **Activate Rule**—Select to activate rule.

   - **Applies To**—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.

   - **Moderation Action**—Change what you want to happen when the criteria is matched.

     – **Block** prevents the content from being published.

     – **Review** allows users with the "Can Approve Feed Post and Comment" permission to approve the content before it's published.

     – **Replace** publishes the content with the keywords replaced as asterisks. For example, *BadWord* becomes *********.

     – **Flag** publishes the content and then automatically flags the content as inappropriate.

   - **Message for Member**—Change the existing pop-up message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use %BLOCKED_KEYWORD% or other inappropriate words in this community. Review your content and try again." The %BLOCKED_KEYWORD% variable displays up to 5 blocked words. You can also use this variable in your own custom message.

     💡 Tip: For international communities, you can translate this message. From Setup, enter *Translate* in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the community the rule belongs to.

   - **Member Criteria**—Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?

   - **Content Criteria**—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to? A list of banned keywords has been created for you and is preselected for the rule. You can add or remove terms from the list by clicking **Content Criteria** and clicking **Banned Keywords**.

4. Click **Save**.

A few things to bear in mind:

- If you activate a content rule without specifying member criteria, the rule applies to all members.
- If you activate a content rule without specifying content criteria, the rule either:
    - Prevents members from creating posts and comments entirely
    - Sends all posts for review
    - Flags all posts and comments
- If you select member criteria and content criteria, the rule applies only when both criteria are met.
- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

Create Content Rules to Moderate Your Community

Create and modify rules for your community to moderate member-generated content. Content rules protect your community from offensive language and inappropriate content created by spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

If your community uses the Customer Service template, moderation rules apply to questions and group posts created by your community members. If you community uses Salesforce Tabs + Visualforce, moderation rules can also run on publisher actions.

You can also use the Metadata API or Tooling API to set up content rules.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Each content rule can have up to 3 keyword criteria and 10 member criteria.
- Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content. If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content.

💡 **Tip:** Before creating a rule, we recommend that you create criteria to use in the rule.

1. Open Community Workspaces or Community Management.

2. Click **ModerationRules**, then click **New** and select **Content Rule**.

3. Complete the following fields:

- `Name`—Enter a name for your rule.
- `Unique Name`—Enter a unique name for your rule. The unique name used by the API.
- `Description`—Optionally, enter a description.
- `Activate Rule`—If selected, the rule is activated.
- `Applies To`—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
- `Moderation Action`—Specify what you want to happen when the criteria is matched.
    - `Block` prevents the content from being published.

- `Review` allows users with the "Can Approve Feed Post and Comment" permission to approve the content before it's published.
- `Replace` publishes the content with the keywords replaced as asterisks. For example, *BadWord* becomes *********.
- `Flag` publishes the content and then automatically flags the content as inappropriate.

- `Message for Member`—Specify the message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use *%BLOCKED_KEYWORD%* or other inappropriate words in this community. Review your content and try again." The *%BLOCKED_KEYWORD%* variable displays up to 5 blocked words. You can also use this variable in your own custom message.

  > 💡 **Tip:** For international communities, you can translate this message. From Setup, enter *Translate* in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the community the rule belongs to.

- `Member Criteria`—Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?
- `Content Criteria`—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to?

> 🛑 **Important:** Keep the following things in mind:
> - If you activate a content rule without specifying member criteria, the rule applies to all members.
> - If you activate a content rule without specifying content criteria, the rule either:
>   - Prevents members from creating posts and comments entirely
>   - Sends all posts for review
>   - Flags all posts and comments
>
>   Yikes! Be careful.
> - If you select member criteria and content criteria, the rule applies only when both criteria are met.
> - Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

4. Click **Save**.

Create Rate Limit Rules to Moderate Your Community

Create and modify rate rules to monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

Each rate rule controls two actions: notification and freeze. You can set up your rate rule for both actions or just one. You can apply the rule to: posts, comments, files, and private messages. In communities that use the Customer Service template, this includes questions and answers.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.

- Each rate rule can have up to 10 member criteria.

> 💡 **Tip:** Before creating a rule, we recommend that you create member criteria to use in the rule.

1. Open Community Workspaces or Community Management.

2. Click **ModerationModerationRules**, then click **New** and select **Rate Rule**.

3. Complete the following fields:

   - `Name`—Enter a name for your rule.

   - `Unique Name`—Enter a unique name for your rule. The unique name used by the API.

   - `Description`—Optionally, enter a description.

   - `Activate Rule`—If selected, the rule is activated.

   - `Applies To`—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles.

   - `Member Criteria`—Specify the member criteria to enforce this rule. Ask yourself, who do I want this rule to apply to?

     Spammers are typically new members. We recommend creating member criteria that only includes customer users that were created in the last 7 days.

     > 📝 Note:
     > - Rate rules don't apply to internal users. You can use member criteria that includes internal users, but the rules don't apply to them.
     > - If you activate a rate rule without specifying member criteria, the rule applies to all external users.

   - `Content Creation Time Frame`—Select the time frame you want to use.

   - `Notify Moderators`—Enter a number. Moderators are sent an email when a member creates this much content in your set time frame.

   - `Freeze Members`—Enter a number. Members are frozen when they create this much content in your set time frame.

     > ❗ **Important:** When members are frozen, they're frozen in all communities that they're a member of.

     Emails are sent to users with the "Moderate Community Users" permission. Make sure that you assign your moderators this permission. Emails are sent even if a user has turned off Chatter emails.

4. Click **Save** to apply your changes.

👁 **Example:** Let's use the following rate rule as an example.

`Applies To:` Posts and private messages

`Member Criteria:` Customer users created in the past 7 days

`Content Creation Time Frame:` 3 minutes

`Notify Moderators:` 6

`Freeze Members:` 10

With this rate rule, here's what happens when a member reaches your limits.

In the span of 3 minutes, a member creates...	Is the moderator notified?	Is the member frozen?
4 posts and 2 private messages	✅	❌
6 posts	✅	❌
6 comments	❌	❌
8 posts and 2 private messages	✅	✅
10 posts	✅	✅
10 comments	❌	❌

A rate rule with these values protects the community from spammers and bots but also allows you to help your new members. Maybe a non-threatening member posted a question over and over hoping to get it answered faster. Rate rules do more than protect—they let you help members in need.

Here's a rule set up just for private messages.

`Applies To:` Private messages

`Member Criteria:` Customer users created in the past 3 days

`Content Creation Time Frame:` 15 minutes

`Notify Moderators:` 1

`Freeze Members:` 3

This rate rule protects the community from spammers that attack via private messages.

My rate rule didn't do anything. What's going on?

Give it time. Rate limit rules might not seem exact, but they are. Trust us. For example, say you set up a rate rule to freeze members when they create content 10 times in 3 minutes. It's possible for a member to create 9 items towards the end of the first 3-minute time frame. In this case, the member isn't frozen until they post another 10 items in the second 3-minute time frame.

Check the member criteria you're using. For example, let's say you have a rate rule that uses member criteria to filter for members without community contributions. After a members first post or comment, the rule doesn't apply to the member anymore, so the member doesn't reach the freeze limit you set.

How and when do community moderation rules execute?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content. On the server, Salesforce executes community rules within the standard order of execution.

Rules that block content execute during system validation. Rules that block content ignore changes made by `before` triggers. For example, if a `before` trigger changes a feed post, a moderation rule that blocks content isn't aware of the changed content and executes on the original content.

Rules to review and approve content execute before database saves. These rules execute before rules that replace content.

Rules that replace content execute before database saves.

Rules that flag content execute after workflow rules.

Enable Record Feed Moderation
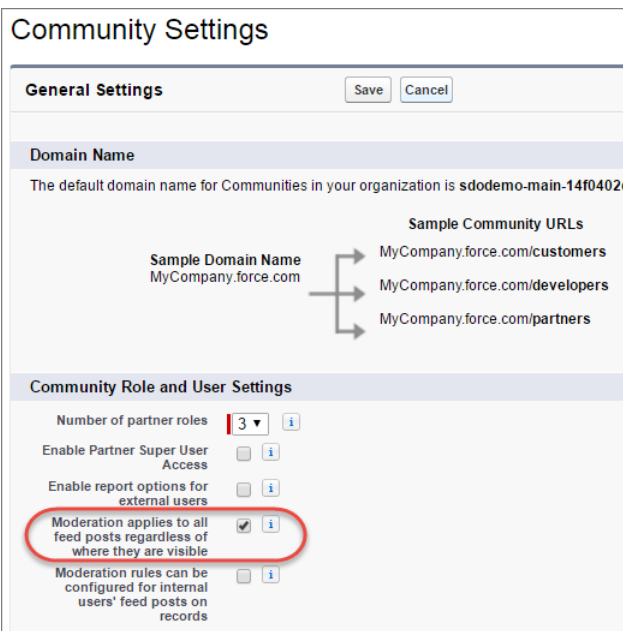
Run moderation rules on comments or posts on any record feed that is visible from within a community. Record feed moderation ensures that member posts or comments stay within the guidelines of the community.

Members can post or comment on any record types that have a feed. The moderation rules configured for your community catch any posts or comments that don't meet the rules' criteria. Flags on a record feed are only visible from within the community that flags them. You can also turn off moderation rules for internal users so that their feed activity isn't flagged.

1. Enter **Communities Settings** in the Quick Find / Search bar.

2. Click the box next to **Moderation applies to all feed posts regardless of where they are visible**.

3. Click **Save**.

👁 **Example:** Enable Record Feed Moderation from Communities

Settings

Review and Approve Posts and Comments in Your Community

Premoderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your community. Posts and comments pending review aren't displayed in the community feed; only the author and community moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the community feed, in Community Workspaces, or in Community Management.

> **Note:** The "Can Approve Feed Post and Comment" permission applies not only to moderation but also to any Chatter feed a user can access. In other words, an assigned user can edit or delete any post or comment. They can take these actions whether in a community or their internal Salesforce org, in any feed they have access to.

To set up a moderation rule to review and approve posts and comments, go to **ModerationRules** and create a content rule that uses the `Review` action. Here are some ways that you can use rules to review content:

Self-Service Community

Does your community allow members to self-register? You can set up a rule to review and approve questions from all your self-registering users. Use member criteria that includes only your guest user profile and filters for members who were created in the past seven days.

Have spammers ever attacked your community? Use member criteria that includes only your guest user profile and filters for members that have never contributed to the community.

Partner Community

Want to ensure that your partners aren't discussing a recent acquisition or other sensitive transactions? You can set up a rule to review posts and comments that include keywords such as "acquisition" or "merger."

Employee Community

Does your community require HIPAA compliance? Set up your rules to review posts and comments from all your employees.

> **Note:** Users must have Manage Communities or Create and Set Up Communitiespermissions to create moderation rules.

Pending Review is displayed in the header of the post or comment until it's approved. Remember that while a post or comment is pending approval, the author can still edit or delete it, however they can't comment on it. An author can see a pending comment on a pending post only if the author posted both. To prevent the author from editing the post or comment, you can disable feed post editing for certain users.

There are two ways to review and approve posts and comments in your community:

- Use a preconfigured Insights report in Community Workspaces or Community Management.

  Use the Pending Insights report provided in the Salesforce Communities Management package. This report lets you see all the posts and comments that are pending review in your community. The Insights report displays the contents of posts and comments so you can quickly assess whether that content is spam or harmless. You can then approve or delete the item directly from the report. You can also perform mass-action and approve multiple items at once.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To approve, delete, or edit posts and comments that are pending review:

> **Note:** An author can see a pending comment on a pending post only if the author posted both.

- Can Approve Feed Post and Comment

To approve, delete, or edit posts and comments that are pending review in Community Workspaces or Community Management:

- Can Approve Feed Post and Comment

  AND

  Access Community Management OR Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the AppExchange Packages for Community Management.

- Approve posts and comments directly in the community feed.

    In the community feed, users with the "Can Approve Feed Post and Comment" permission see an extra action in the post or comment drop-down menu. If the item is inappropriate, they can delete it. If it has a typo, they can edit it.

After the item is approved, the author receives an email letting them know the item is approved and providing a link to it. Email notifications, such as @mentions notifications, are sent only after the item is approved.

Moderate Flagged Posts and Comments in Your Community

Community moderators can review a list of posts and comments that members of the community have flagged as inappropriate and act on them. Group owners or group managers, can view flags and act on items in their groups.

Flagged posts and comments have a small orange flag next to the post or comment date. The number next to the flag indicates how many people have flagged the item. The moderator can review each item and act on it.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- Within a community group, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged posts and comments:

- View flagged posts and comments from the Moderation Overview Home App in the Flagged Discussions queue on page 36.
- Use a preconfigured Insights report in Community Management.

    If you have not enabled Community Workspaces, use the Flagged Comments and Flagged Discussions reports provided in the Salesforce Communities Management package. These reports let you quickly manage your community's flagged posts and comments. You can see the content of the post or comment and then remove the flag or delete it. You can also select multiple items at once.

- Use the flagged feed in Chatter.

    If you're using a Salesforce Tabs + Visualforce community, you can see a list of flagged posts and comments using the Chatter menu in your community. The `Allow members to flag content` preference must be enabled to see the Flagged feed.

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To view flagged items, remove flags, and delete posts or comments:

- Moderate Communities Feeds

To moderate posts and comments in Community Workspaces or Community Management:

- Access Community Management ORModerate Communities Feeds

    AND

    Manage Communities OR Create and Set Up Communities
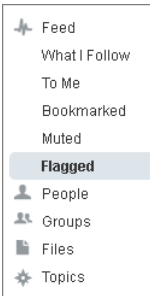
    AND

    Is a member of the community

- Moderate using a custom list. You can expose a list of flagged posts and comments using the Chatter REST API or ConnectApi in Apex.

- Click the link to the post or comment from the notification email.

- Moderate directly within context of the community by removing flags or deleting content in the feed.

> 💡 Tip: To receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

Moderate Flagged Discussions in Your Community

Community moderators can delete and unflag posts and comments from discussions, and freeze or communicate with the author of those posts, all from one place.

Moderators can view an entire discussion in context (including all comments related to a post) and sort by the newest discussions or the oldest. Click **View Discussion** to open a discussion thread.
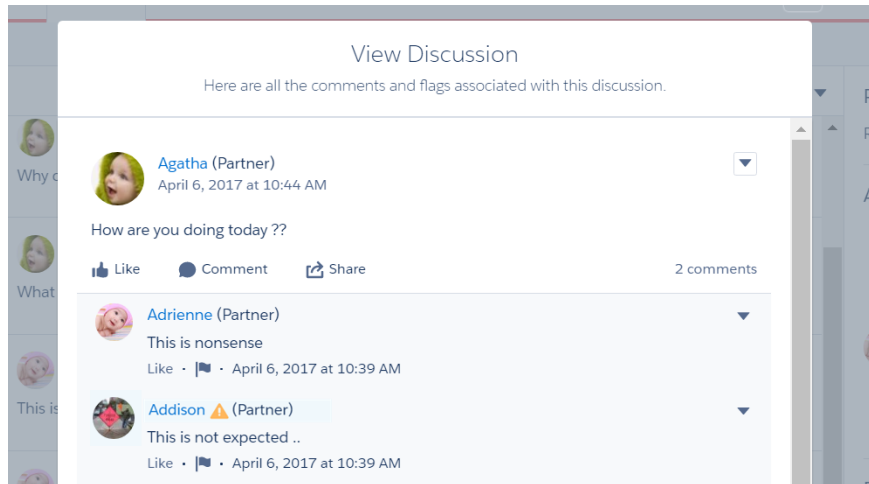
Click a post or comment or select **View Flag Details** to see how a post or comment has been flagged and who flagged it.
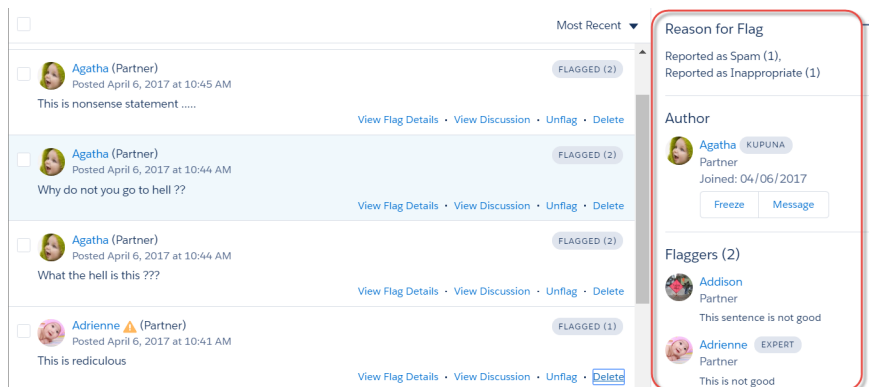
Want to know more about the author of a flagged post? We've got you covered. You can see which authors have a history of flagged posts and how many times a moderator has deleted their posts. If necessary, freeze the author and send them a message from the same page.

A few things to keep in mind:

- The Flagged Discussions queue is available only in organizations that have enabled Community Workspaces.
- Moderators can only view and act on items they have access to.
- Within a community group, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

Want to see what's going on in your community overall? Install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the AppExchange Packages for Community Management.

Moderate Flagged Files in Your Community

Community moderators can review a list of files that members of the community have flagged as inappropriate or spam and take action. Group owners or group managers can view flags and take action on files in their groups.

Members of your community may post files that aren't appropriate because they contain sensitive information or offensive content. Other members of the community can flag these files for review. Flagged files have a small orange flag. The number next to the flag indicates how many people have flagged the item.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- Within a group in a community, group owners and managers can review and remove flags on files in the groups they own and manage if `Allow members to flag content` is enabled for their community.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged files:

- Access the Flagged Files Insight report directly from the Community Management Moderation Overview page.
- Use a preconfigured Insights report in Community Management or Community Workspaces.

  Use the Flagged Files report provided in the Salesforce Communities Management package. This report lets you see the name of the flagged file, who created it, who flagged it, and how many flags the file has. You can click a link to open the file and review the content. Then you can remove the flag or delete the file. You can also select multiple items at once.

  To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the AppExchange Packages for Community Management.

- Moderate using a custom list. You can expose a list of flagged files using the Chatter REST API or ConnectApi in Apex.
- Moderate directly within context of the community by removing flags or deleting content on the file detail page.

> 💡 **Tip:** To receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

To limit the size and types of files allowed in your community, go to **Administration** > **Preferences**.

USER PERMISSIONS

To view the file detail page, remove flags, and delete files:
- Moderate Communities Files

To moderate files in Community Management:
- Moderate Communities Files

  AND

  Access Community Management OR Manage Communities OR Create and Set Up Communities

  AND

  Is a member of the community

Moderate Flagged Direct Messages in Your Community

Community members can flag messages in communities built using the Customer Service (Napili) template. Community moderators can review and act on a list of direct messages that members of the community have flagged as inappropriate or spam.

> ✏️ **Note:** Private messages and direct messages are separate features. Direct messages are newer and offer a richer feature set for private communication in communities. Direct messages are based on Chatter and offer a rich text editor that supports inline images and attachments. With direct messages, you can start a message right from a feed post.

The "Moderate Communities Chatter Messages" permission allows moderators to see the contents of flagged direct messages, remove flags, and delete flagged messages.

1. If you haven't already, install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange.

2. Open Community Workspaces or Community Management.

3. In Community Management, go to **Moderation** > **Flagged** and select **Direct Messages** from the dropdown menu to filter the flagged items.

4. Review and act on the flagged messages.

> 💡 **Tip:** If you want to receive an email each time a message in your community is flagged, select the **Flags an item as inappropriate** option on the Email Settings page. To receive emails, you must have the "Moderate Communities Chatter Messages" and "Manage Chatter Messages and Direct Messages" permissions. To set your email preferences, go to your profile page within a community, click the dropdown button ▾ in the upper-right corner, and select **My Settings**, then click **Email Settings**.

Moderate Flagged Private Messages in Your Community

Community moderators can review and act on a list of Chatter messages that members of the community have flagged as inappropriate or as spam.

The "Moderate Communities Chatter Messages" permission allows users to see the contents of messages, remove flags, and delete messages only in communities they're a member of. With this permission, only flagged messages can be deleted. The "Modify All Data" permission allows moderators to remove flags or delete a message in the SOAP API.

Ensure that your moderators are assigned the "Moderate Communities Chatter Messages" permission, *not* the "Manage Chatter Messages" permission. The "Manage Chatter Messages" permission allows users to see *all* the messages in your entire Salesforce org. Avoid security and privacy concerns; double-check that your moderators and managers have the right permission.

<table>
<tr><td>⊘</td><td>Important: Keep these limitations in mind:</td></tr>
</table>

- Community members can't flag messages sent from communities that they aren't a member of or that haven't turned on flagging for their users.
- Users can't flag messages in your internal organization, in the Salesforce app, or in partner and customer portals.

There are a few ways to monitor and manage flagged messages in your communities:

- Access the Flagged Files Insight report directly from the Community Management Moderation Overview page.
- Use a preconfigured Insights report in Community Management or Community Workspaces.

  Use the Flagged Private Messages report provided in the Salesforce Communities Management package. This report lets you track trends and stay on top of message spamming attacks in your community. You can view who sent the message, the contents of the message, when it was sent, and who flagged the message. You can use this report to unflag messages and delete messages.

  To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see Report on Communities with the AppExchange Packages for Community Management.

- Create your own report.

  First, create a custom report type using `Networks` as the primary object and `Network Audits` as the secondary object. Then create a report using your new custom report type and add a field filter for `Audited Object Type` set to equal `Chatter Message`. Use the API to delete flagged messages.

- Directly query the flagged messages from the API and then delete them.

<table>
<tr><td>💡</td><td>Tip: If you want to receive an email each time a message in your community is flagged, select the Flags an item as inappropriate option on the Email Settings page. To receive emails, you must have the "Moderate Communities Chatter Messages" and "Moderate Communities Feeds" permissions. To set your email preferences, go to your profile page within a community, click the dropdown button (▾) in the upper-right corner and select My Settings, then click Email Settings.</td></tr>
</table>

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your community.

> 💡 **Tip:** Did you know you can do this in the UI? Most communities don't need custom moderation triggers. You can create moderation rules and criteria directly in Community Workspaces or Community Management. For more information, see Community Moderation Rules.

Using triggers to automatically flag items allows you to moderate your community behind the scenes. These flags are **only** visible to moderators. You can view flags in Community Workspaces or Community Management, query for them in the API, or use custom report types to create reports on flagged items, people whose items are flagged most, and more.

Consider the following when creating triggers:

- Create Apex after insert triggers on either FeedItem, FeedComment, ChatterMessage, or ContentDocument.

- Define criteria that when met creates a NetworkModeration (flag) record, with the FeedComment, FeedItem, ChatterMessage, or ContentDocument as the parent.

> 👁 **Example:** This trigger automatically flags posts in your community that contain *BadWord*.

```
trigger autoflagBadWordOnPost on FeedItem (after insert) {

    List<NetworkModeration> flags = new List<NetworkModeration>();

    for (FeedItem rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope)){
            continue;
        }

        if (rec.body.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility
 = 'ModeratorsOnly');
            flags.add(nm);
        }
    }

    if (!flags.isEmpty()) {
        insert(flags);
    }
}
```

A similar trigger on comments would look like this.

```
trigger autoflagBadWordOnComment on FeedComment (after insert) {
    List<NetworkModeration> flags = new List<NetworkModeration>();

    for (FeedComment rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope)) {
            continue;
        }

        if (rec.commentBody.indexOf('BadWord') >= 0) {
```

```
         NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility
= 'ModeratorsOnly');
             flags.add(nm);
         }
     }

     if (!flags.isEmpty()){
         insert(flags);
     }
}
```

Community Pulse

Community Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create new ones to meet your needs.

To get started, map reports and dashboards to your Workspaces. You can either map manually or install the Winter '18 or later version of the AppExchange package. After installation, Community Pulse displays automatically. If you have a Community with Chatter, four tiles display once you install the package: Members, New Members, Unanswered Questions, and Flagged Discussions.

To customize a metric tile, click **Edit Metrics**. From here, create a metric or edit an existing one. You can have up to six metrics at a time.

By design, clicking a metric opens the corresponding report. However, selecting **Open in dashboard** lets you open a dashboard instead.

Communities Moderation Limits and Limitations

Community moderation limits ensure that your community performs optimally.

Criteria Limits

- Your org can have up to 30 keyword list criteria. This limit is per org, not per community.
- Your org can have up to 100 member criteria. This limit is per org, not per community.

Rule Limits and Limitations

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.

- Moderation rules apply only to feed posts, comments, and polls. Moderation rules do not apply to topics that are created.

Audit Limitations

Changes to a feed item's status are not included in the Audit Trail Insights report.

Organize Communities with Topics

Navigational, featured, and content topics are a fantastic way to organize information and content in a community. Use topics to structure your community content or highlight key discussions. You can create topics or use the topics that organically emerge from community member posts.

Choose navigational topics and subtopics to provide a consistent map of your community. Use featured topics to highlight current, popular conversations. Use content topics to organize your original content. In the community itself, member-created topics let users organize information for each other, creating a personalized experience that boosts community engagement.

Community members can keep up-to-date on topics by following them and, optionally, receiving email notifications for topics they follow.
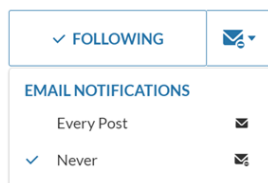
When members choose Every Post, they get notifications when a post or question is added to the topic. They don't get notifications when the hashtag topic is added to a comment, answer, or record feed.

Navigational Topics

On every page of a self-service community, navigational topics are available from the Topics menu at upper left. Community members can also see all the community's navigational topics and subtopics in one place in the topic catalog.
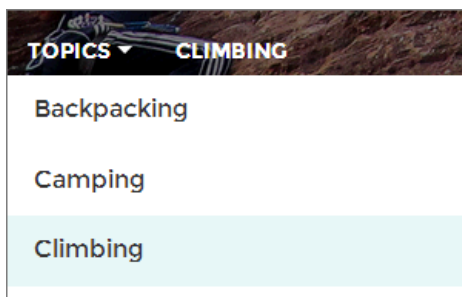
When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.
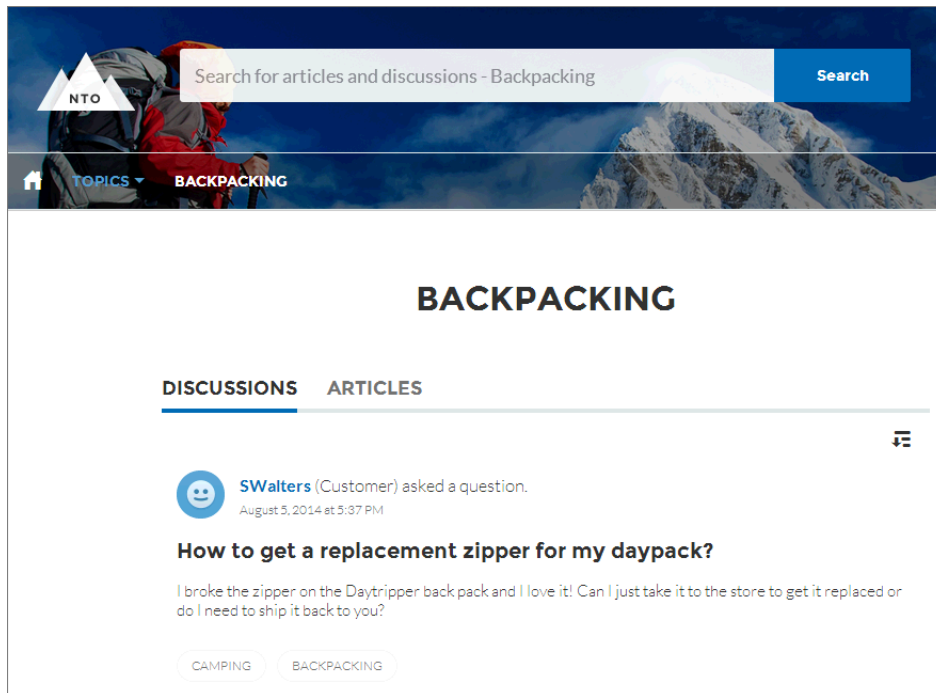
Featured Topics

Featured topics are accessible from the body of your community home page. Thumbnail images you select for featured topics uniquely identify them. (These unique thumbnails appear only on the home page; at the top of all featured topic pages, the default banner image specified in Community Builder appears.)
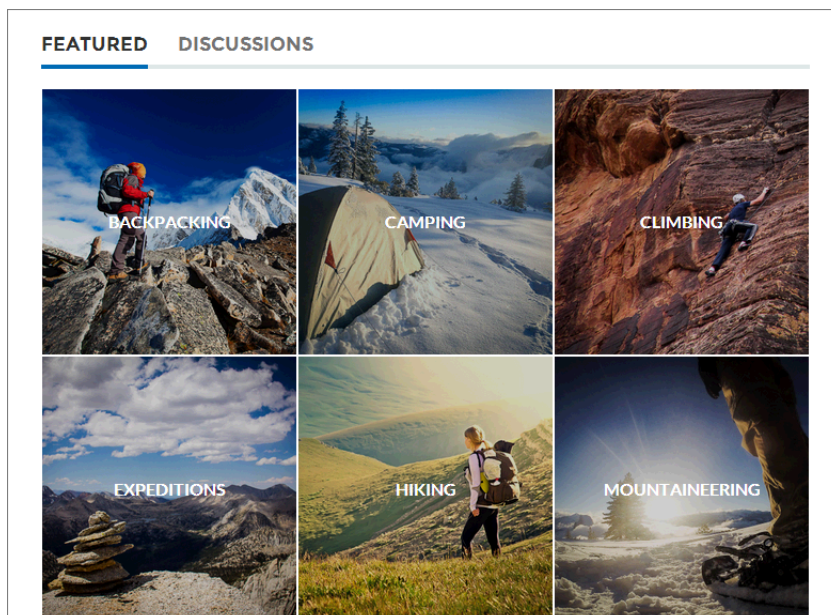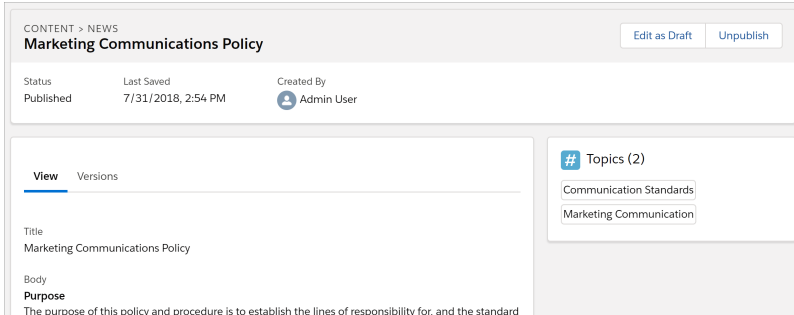
Content Topics (Beta)

> 📝 **Note:** This release contains a beta version of CMS for Community Cloud which means it's a high-quality feature with known limitations. CMS for Community Cloud isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for CMS for Community Cloud in the Community Cloud group in the Trailblazer Community.

Content topics allow you to organize your original content around common themes. Enable topics that you're already using for content, or create new topics and enable them for content. After topics are enabled for content, assign them to your native content.
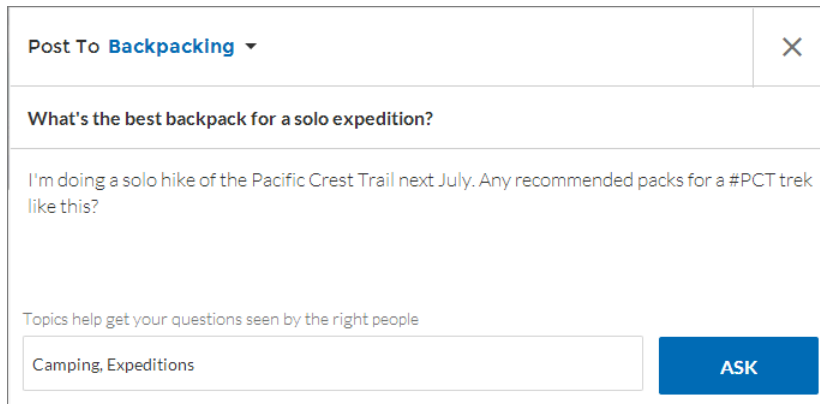
Member-Created Topics

When posting questions, community members create topics by using hashtags in body text, or typing in the topic suggestions box. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for community users.)

If any suggested topics are poor matches for the post, members can simply click to delete them.

> 💡 **Tip:** Member-created topics can be accessed via search or highlighted as featured topics.

Topic Metrics

Community members can check how often a topic has been used in the past 60 days and how many followers it has. Find metrics on a topic's detail page. With this information at their fingertips, community members know how current and popular a topic is. Admins can also use these metrics to highlight certain topics in their communities or consolidate similar topics based on usage.

Manage Topics in Communities

USER PERMISSIONS		EDITIONS
To access Community Workspaces or Community Management page:	Manage Communities OR Create and Set Up Communities	Available in: Salesforce Classic (not available in all orgs) and Lightning Experience
To create topics:	Create Topics	Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions
To merge topics:	Merge Topics	
To delete topics:	Delete Topics	
To edit topics:	Edit Topics	

As the number of topics in a community grows, curate them to improve usability. You can create, merge, rename, enable for content, and delete topics in one convenient location.

1. Open Community Workspaces or Community Management.

> 💡 **Tip:** If you want to create content topics or enable topics for content, use Community Workspaces.

2. If you're using Community Workspaces, access topics by clicking **Content Management** > **Topics**. If you're using Community Management, access topics by clicking **Topics** > **Topic Management**.

3. Do one of the following.

   - To create a topic (often with a plan to merge existing ones into it), click **New**. Add a name and a topic description to boost SEO. If you want to be able to associate the topic with native content, select **Enable for content**.

   - To combine topics, click **Merge**.

     Merging a topic automatically redirects existing hashtags in posts. If you merge a navigational or featured topic, the topic type, image, and any subtopic relationships are discarded. If you merge a topic with a content topic, the content associations are preserved.

   - To enable up to 10 topics for content at the same time, select the topics and click **Enable for Content**.

     After enabling topics for content, you can associate the topics with your native content.

   - To edit a topic in Community Workspaces, click ▼ and select **Edit**. In Community Management, click 🖉.

     If you deselect **Enable for content** when editing a topic that is associated with content, saving your changes removes the associations.

   - To see a topic detail page in your community, click the topic name.

   - To delete a topic in Community Workspaces, click ▼ and select **Delete**. In Community Management, click 🖉.

   If you don't see a topic you're looking for, you can search for it.

> 💡 **Tip:** For communities with a global audience, you can translate names and descriptions of topics.

Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your community by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. And articles added to the data category in the future will also be tagged.

To use automatic topic assignments, enable Community Workspaces in Community Settings.

1. Open Community Workspaces.

2. Access automatic tTopic assignments by clicking **Content Management** > **Topics** > **Automatic Topic Assignment**.

3. Enable **Automate Topic Assignment**.
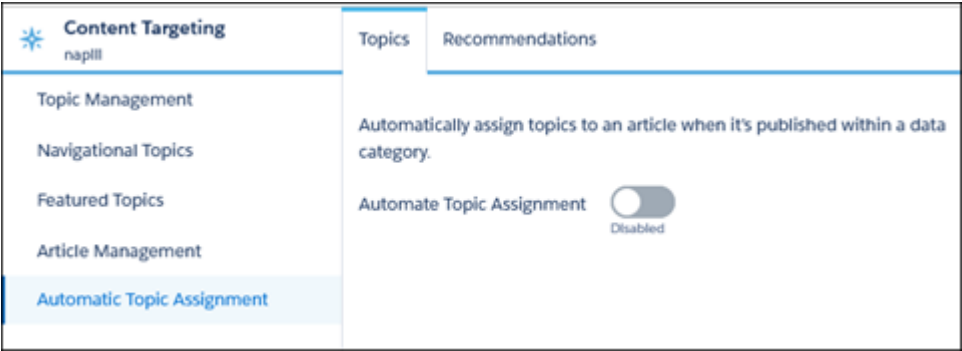
4. Select a data category group and a data category.
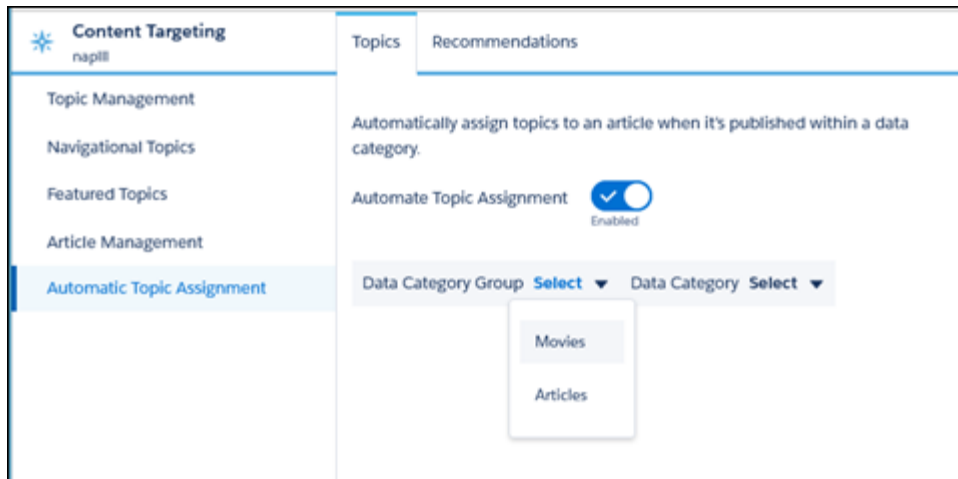
5. Add the topics that you want to assign to the articles under that data category.
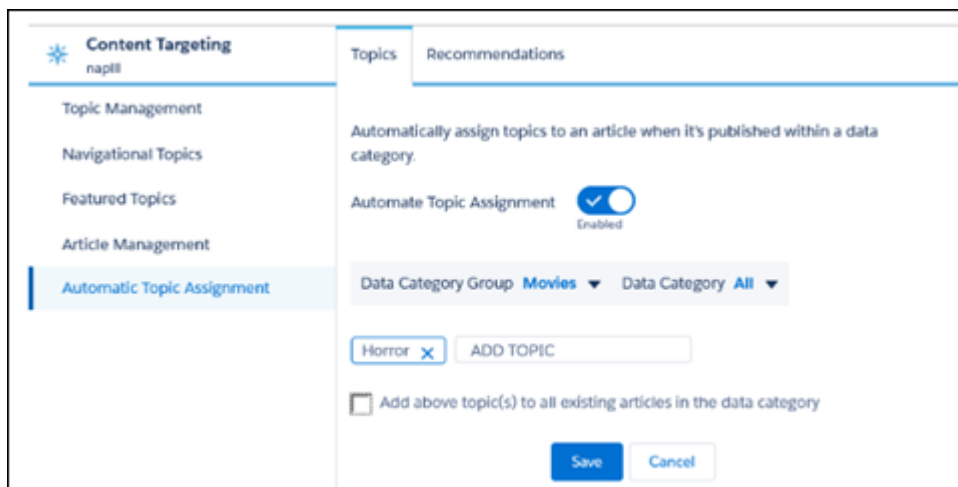
6. Select the option to add the topics to existing articles in the data category. The topics are then assigned to all articles in all data categories under the data category group. If you don't select this option, the topics are added only to new articles added to the data category, and the existing articles remain unchanged.

7. Click **Save**.

Consider the following as you set up your topic assignment rules.

- Topic assignments are community-specific. If you use the same article in two different communities, set up automatic assignments in both communities.

- If a translation of a topic is available in Salesforce, the translated article is tagged with the corresponding translated topic. If there's no translated topic in the system, localized articles are tagged with the base language topic.

- You can't automatically remove topics from articles. Instead, you must manually remove topics.

- If you merge two topics, you must set up new rules.

- If you automatically add a topic to a data category, the topic is added to all articles in the data categories above it in the hierarchy. Topics aren't automatically added down a hierarchy to child data categories.

Set Up Featured Topics

Featured topics highlight current, popular community conversations. Change them regularly to keep community members up-to-date and engaged.

1. Open Community Workspaces or Community Management.

2. If you're using Community Workspaces, access featured topics by clicking **Content Management** > **Topics** > **Featured Topics**. If you're using Community Management, access featured topics by clicking **Topics** > **Featured Topics**.

3. Enter the first few letters of the topic name in the search box. Select a suggested topic and click **Add**. Use navigational or member-created topics.

   > 💡 Tip: Using the Chatter REST API, you can create unique featured topics, separate from navigational or member-created ones.

4. Hover over a topic name, and click 🖉. Then click **Upload thumbnail image**, and select an image that represents the featured topic on the community home page.

   (Thumbnail images are scaled to 250 x 250 pixels. To prevent distortion, create image files with those dimensions.)

5. Repeat steps 3 and 4 to create several featured topics for your community, up to a maximum of 25. Then click **Save**.

To edit featured topics, hover over a topic name.

- To move topics up or down, click the arrows at left.

- To delete topics or change their thumbnail images, click 🖉.

Set Up Navigational Topics

Structure your community's content and help your users find what they need with navigational topics. If your organization uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. (If data categories aren't enabled, administrators can add articles to each topic using the Chatter REST API.)

1. From Setup, enter `Topics for Objects` in the `Quick Find` box, then select **Topics for Objects**, and enable topics for all the article types you want to include.

    📝 **Note:** Enabling topics disables public tags on articles. Personal tags aren't affected.

2. Open Community Workspaces or Community Management.

3. If you're using Community Workspaces, access navigational topics by clicking **Content Management** > **Topics** > **Navigational Topics**. If you're using Community Management, access navigational topics by clicking **Topics** > **Navigational Topics**

4. In the text box at right, enter a topic name, and click **Add**. Want to add subtopics? After you add a topic, choose your topic from the dropdown menu (under Show subtopics of). To add a subtopic, add another topic and click **Add**. You can add up to two levels of subtopics for each parent topic.

5. If your organization uses data categories, hover over the navigational topic name, and click 📇. Select a Data Category Group, then select the categories you want to add to the topic, and click **Add Articles & Close Window**.

    🛑 **Important:** This process adds only current articles to a topic. To add new articles, return to Community Management or Community Workspaces and repeat the previous step.

6. Hover over a topic name, and click 🖉. Then click **Upload banner image** and select an image that appears across the top of the topic page.

    (Banner images are scaled to 1400 x 180 pixels. To prevent distortion, create image files with those dimensions.)

7. Repeat steps 4–6 to create several navigational topics for your community. Then click **Save**.

8. Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization.
    This table shows the maximum number of navigational topics and subtopics you can create in the UI of a Customer Service community template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

With Chatter REST API or Chatter in Apex, you can create an additional five levels, each with 10 subtopics, for a total of 2,775 navigational topics.

> 💡 **Tip:** To edit navigational topics, hover over a topic name.

- To move a topic up or down, click the arrows at left.
- To rename or remove a topic, change its banner image, or remove assigned articles, click 🖉 .

Set Up Content Topics (Beta)

Content topics organize your original content around common themes.

> 📝 **Note:** This release contains a beta version of CMS for Community Cloud which means it's a high-quality feature with known limitations. CMS for Community Cloud isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for CMS for Community Cloud in the Community Cloud group in the Trailblazer Community.

1. Open Community Workspaces.

   You can view and edit content topics in Community Management, but you can't create content topics or enable topics for content in Community Management.

2. Access topics by clicking **Content Management** > **Topics**.

3. Select **All Topics** > **All Content Topics**.

4. To create a content topic, click **New**.

5. Enter a name and description. Select **Enable for content**.

6. Repeat steps 4 and 5 to create several content topics for your community, up to a maximum of 25.

   Alternatively, use the All Topics list and select up to 10 topics at a time and click **Enable for Content**.

After a topic is enabled for content, you can associate the topic with your native content.

To edit or delete a content topic, click ▼ in the topic row and select **Edit** or **Delete**.

See Your Community's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your community's content. Now you want your community members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your community's topic catalog.

The topic catalog shows the hierarchy of navigational topics you've created for the community. It's only visible after you set up navigational topics, and it's accessed from the navigation menu.

How is the topic catalog useful to your community members?

- New and returning users look at all the organized topics in one place, getting a lay of the land before diving deeper into a specific topic.
- Any community user can use the topic catalog as a jumping point to go from topic to topic.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To access Community Workspaces page:
- Manage Communities

  OR

  Create and Set Up Communities

  AND

  Is a member of the community

To set up content topics:
- Create Topics

  AND

  Edit Topics

To set up the topic catalog, select **Add the "More Topics…" link** when editing the navigation menu on the home page. The link appears when you have at least one subtopic.

You can also see an article or discussion's placement in the topic hierarchy using breadcrumbs. To show breadcrumbs on your community's pages, drag the Breadcrumb component to the page in Community Builder.

👁 Example:
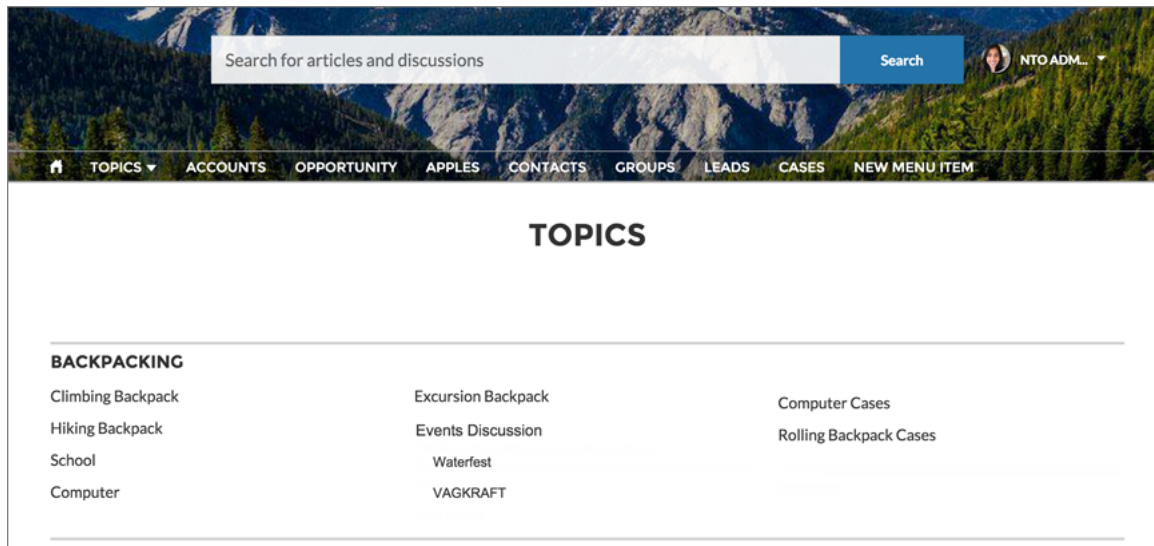
Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as community needs change.

1. Open Community Workspaces or Community Management.

2. If you're using Community Workspaces, access topics by clicking **Content Management** > **Topics** > **Article Management**. If you're using Community Management, access topics by clicking **Topics** > **Article Management**.

3. Use the search bar to look for articles. Filter your search by selecting a data category group, followed by a specific category.

4. Click an article, and then type to assign topics, or click existing ones to remove them.

> **Note:** To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Essentials**, **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

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USER PERMISSIONS

To access Community Workspaces or Community Management page:
- Manage Communities

  OR

  Create and Set Up Communities

To add or remove topics:
- Create Topics

Translate Topics Names and Descriptions for Communities with International Audiences

Use the Translation Workbench to translate topic names and descriptions in international communities.

1. From Setup, enter `Translate` in the `Quick Find` box, then select **Translate**.

2. Select the language you're translating into.

3. Select **Managed Topic** for the Setup Component.

4. For Aspect, select **Field Label** for the topic name, and **Description** for the topic description.

5. In the Community Name column, expand a community to see its master topic names.

6. To enter language-specific names for topics, double-click in the Topic Name Translation column. For descriptions, double-click in the Topic Description Translation column.

   Consider the following when you're using the Translation Workbench:

   - There's no Metadata API support for translated topic names or descriptions.

   - While topic name uniqueness is guaranteed in English, the translator must ensure the uniqueness of topic names in the translated language.

   - Modifying topic names from Community Workspaces or Community Management only changes the English community. All translated topic name and description changes must be made using the Translation Workbench.

   - If a translated topic name is entered when the community is in English mode, the translated name can appear twice in the translated community.

   - When topics names are translated with the Translation Workbench, hashtags in the translated communities also change. For example, #help shows as #aiuto in Italian. If the community member then reverts to English from Italian, clicking the #aiuto hashtag gives an error message rather than showing the topic detail page of #help.

   📝 Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

Customize Recommendations in Communities

Create recommendations to drive engagement for your community, encouraging users to watch videos, take trainings, and more. Target specific audiences and use channels to specify locations for the recommendations.

1. Open Community Workspaces or Community Management.

2. Open Recommendations.

   - In Community Workspaces, select **Content Management** > **Recommendations**.
   - In Community Management, select **Recommendations** > **Recommendations**.

3. Select **Default Channel** or one of the custom channels.

   A channel is a way to group recommendations together so you can determine where they show up in the community.

   Default Channel
   Recommendations in the default channel appear in predefined locations, such as the Home and Question Detail pages in Customer Service and Partner Central communities.

   Custom Channel
   You choose the pages where you want these recommendations to appear. In Community Builder, add the Recommendations Carousel component to the page where you want the recommendation to appear. Use the property editor to specify the custom channel with the recommendation.

   Using a custom channel, you could surface a recommendation to review specific knowledge articles on a product description page to guide customers to more information.

   If you want to change the channel of a recommendation, delete the recommendation and recreate it in a different channel.

4. Click **New**.

5. Complete the following fields:

   - `Name`—Enter a name for the recommendation. This name doesn't appear in the community.
   - `Image`—Click **Upload Image** to include an image with your recommendation.
   - `Title`—Optionally, enter header text that appears above the image.
   - `Description`—Enter detailed text that suggests what users can do.
   - `Button text`—Enter a label for the button in the recommendation.
   - `https://`—Enter the URL that the button opens.

   The URL can contain context variables to pass information about the user who clicked the recommendation and the context in which it was clicked. For example, include a `{!userId}` context variable in your URL, `https://www.example.com/doSurvey?userId={!userId}`. When a user clicks the button in the recommendation, Salesforce sends the ID of that user to your server in the HTTP request.

   Recommendations support these context variables.

Context Variable	Description
`{!actionLinkId}`	The ID of the recommendation link that the user clicked.

Context Variable	Description
`{!actionLinkGroupId}`	The ID of the recommendation link group containing the recommendation that the user clicked.
`{!communityId}`	The ID of the community in which the user clicked the recommendation. The value for your internal Salesforce org is the empty key, `"000000000000000000"`.
`{!orgId}`	The ID of the org in which the user clicked the recommendation.
`{!userId}`	The ID of the user that clicked the recommendation.

- `Audience`—Select an audience for the recommendation. If you don't select an audience, all members of the community see the recommendation.

  > 💡 Tip: To create an audience that appears in this drop-down list, in Community Workspaces, select **Content Management** > **Recommendations** > **Audiences**. In Community Management, select **Recommendations** > **Audiences**. Click **New**.

- `Enabled`—If checked, this recommendation is active and appears in communities.

  The Recommendations Carousel displays your custom recommendations and also displays system-generated topic recommendations for your community.

  After a community member clicks or dismisses a recommendation, it no longer appears for that member.

6. Click **Save**.

> 💡 Tip: To remove a recommendation, click the recommendation name. At the bottom of the recommendation details, click **Delete**.

Create Targeted Audiences for Your Community Recommendations

Create audiences of new community members or use the API to manage customized lists of audience members to organize and target recommendations.

1. Open Community Workspaces or Community Management.

2. Open Recommendation Audiences.

   - In Community Workspaces, select **Content Management** > **Recommendations** > **Audiences**.

   - In Community Management, select **Recommendations** > **Audiences**.

3. Click **New**.

4. Complete the following fields.

   - `Name`—Enter a name for the audience.

   - `Audience Type`

     – Select **New Members** to create an audience based on how long users have been community members.

       Enter the number of days since registration for audience members.

     – Select **Custom List** to create an audience based on any criteria you want.

       📝 Note: You can't manage audience membership for custom lists through the UI. Add and remove members through the API.

5. Click **Save**.

Audiences you create appear in the Audience drop-down list when you create a recommendation.

💡 Tip: To remove an audience, click the audience name. At the bottom of the audience details, click **Delete**. If you remove an audience that is associated with a recommendation, the recommendation is disabled and the audience is set to the default (All community members).

Gamification

Use gamification tools, like Recognition Badges and Reputation, to keep your members engaged in your community.

Recognition Badges

Acknowledge your members' accomplishments or celebrate with them using Recognition Badges.

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

We provided some default badges but you can create your own. You can also choose who else can create badges and who can give badges in your community.

Recognition Badges Considerations

While Recognition Badges are a great way to keep your members involved in your community, keep a few things in mind when you use them.

- Chatter must be enabled for your community.
- Community members with the following user licenses can see the badges that they have received, but not give badges:
  - Customer Portal User
  - High Volume Customer Portal
  - Internal Portal User
  - Standard Partner

- Badges aren't translated. The badge name and description are the same regardless of which language the member is using.
- "Review" moderation rules are not enforced for badges comments. To help prevent blacklisted keywords from appearing in your community, add your list of words to "block" or "replace" rules.

Recognition Badges Setup

With just a few steps, you can set up Recognition Badges for your community and restrict who can create and give badges.

Enable Work.com Thanks

Recognition Badges are based on the Work.com Thanks feature. Enable this feature plus the ability to restrict who can create badges before continuing in your setup.

> 📝 **Note:** You don't need an additional work.com license to set up the Thanks feature.

1. In Classic, from Setup, enter `Work.com` in the **Quick Find** box.
2. Select **Work.com Settings.**
3. Under **Thanks Setting**, select **Enable** and save. The Restrict Custom Badge Creators option is now available.
4. Under Restrict Custom Badge Creators, select **Enable**, and save.
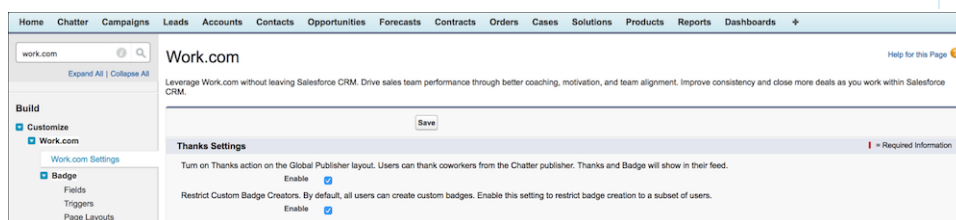
Configure Who Can Create Recognition Badges

Use permission sets, our recommended method, to choose which members can create recognition badges. Restricting who can do so helps control the number of badges in your community and maintains the value of a badge.

Say that you create a recognition badge to be given to MVPs. Restricting who can create badges helps eliminate the risk of having multiple MVP badges. Restricting who can give the badge to, say, community managers helps make sure only those members who are truly MVPs receive recognition for it.

1. First, set up the permission set for creating badges. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.

2. Click **New**.

3. Enter your permission set information. Name the permission set "Create Custom Badge Definitions."

4. Click **System Permissions** and then click **Edit**.

5. To add the permissions for creating a badge, select **Create custom Badge Definitions** permission.

6. Select **Manage Assignments** and add those users you want to let create badges.

Configure Who Can Give Recognition Badges

Use permission sets, our recommended method, to choose which members can give recognition badges. Restricting who can do so helps control the number of badges in your community and maintains the value of a badge.

> 📝 **Note:** Buttons for giving badges appear in two places on the member's profile. If, after following the steps below, your approved users don't see the Give button at the top of a member's profile, under Settings, go to Users. Edit the User Page Layout and add the Give Badge action in the Salesforce Mobile and Lightning Experience Actions section.

1. First, set up the permission set for giving badges. From Setup, enter `Permission Sets` in the `Quick Find` box, then select **Permission Sets**.

2. Click **New**.

3. Enter your permission set information. Name the permission set "Give Recognition Badges in Lightning Communities."

4. Click **System Permissions** and then click **Edit**.

5. To add the permissions for giving a badge, select **Give Recognition Badges in Lightning Communities** permission.

6. Select **Manage Assignments** and add those users you want to let give badges.
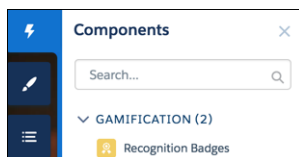
Use Components to Display Recognition Badges on Member Profiles

Use the User Profile component or the Recognition Badge component to display Recognition Badges on a member's profile.

You can either use the User Profile component or the Recognition Badges component to allow assigned badges to display on a member's profile page.

1. In the User Profile component, select **Show Recognition Badges**.

2. Alternatively, drag the Recognition Badges component onto the profile page.

Display the Full List of Recognition Badges on a Member's Profile Page

Edit the user profile layout to display the full list of recognition badges on a members' profile page.

1. From Setup, go to **Users** under **Customize**. Select **Page Layouts**.

2. Click **Edit** next to User Profile Layout.

3. Click **Related Lists** and drag **Recognition** to the Related Lists section of the page layout and save.
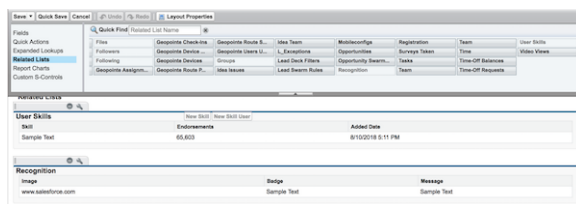
4. Each community's guest users have a discrete user profile. To find out which user profile layout to update, go to Community Builder, of the community you're working on, open Settings, and then click the link to the guest user profile. Repeat steps 1–3 for that user profile layout.

<div style="float: right; width: 30%;">

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.
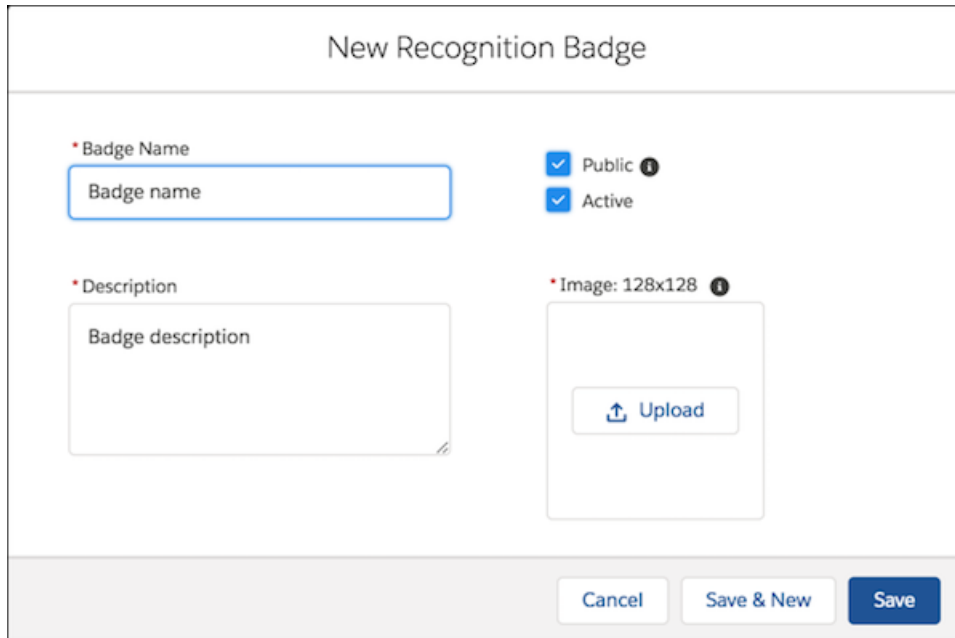
USER PERMISSIONS

To manage page components:
- Create And Set Up Communities

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To update the user profile layout:
- Customize Application

</div>

Turn On Recognition Badges in Community Workspaces

Turn on Recognition Badges via the Gamification Tile to finish setting up and start giving badges.

Before you can complete this task, you enable Work.com's Thanks feature, configure permission sets for who can create and give badges, and add recognition to user profile layouts.

1. In Community Workspaces, click the Gamification tile.

2. In **Settings**, turn on Recognition Badges. A Recognition Badges section appears above **Settings**.

3. To see the available badges and create and manage badges, click **Recognition Badges**.
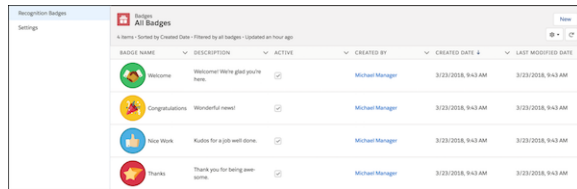
Create, Edit, and Delete Recognition Badges

In addition to the four default badges, you can create your own to fit the needs of your community. You can edit both the default badges and your custom badges.

1. To create a badge, in Community Workspaces, click the Gamification tile and go to the Recognition Badges section.

2. Click **New**.

3. Give your badge a name and a description and upload an image. Click **Save**. The **Public** and **Active** checkboxes are selected by default. When you save, your badge is immediately available to everyone with permissions to give a badge. If you want to limit who can give a badge, deselect **Public**. If you aren't ready for it to be live, deselect **Active**.

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To turn on or off Recognition Badges:
- Create and Set Up Communities

  AND

  Moderate Chatter

EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To create recognition badges:
- Create Custom Badge Definitions

To manage your recognition badges:
- Create And Set Up Communities

  AND

  Moderate Chatter

  OR

  Manage Communities

  AND

  Moderate Chatter

To manage badges created by someone else:
- Modify All Data

  AND

  Moderate Chatter
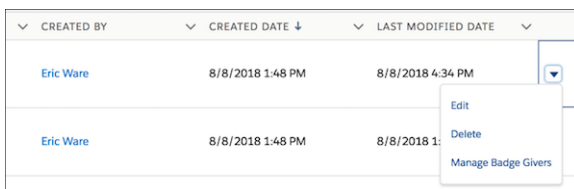
4. To edit the fields, go to the badge related list, click the dropdown and the end of the badge's row, and click **Edit**.

5. To delete a badge, go to the badge related list, click the dropdown and the end of the badge's row, and click **Delete**.

Manage Who Can Give a Specific Recognition Badge

Controlling who can give a recognition badge helps make sure that the right badges are awarded to the right members. For example, you can set it up so that only community managers can award MVP and VIP badges.

By default, recognition badges are available to everyone with permission to give badges. To be able to select specific givers, make sure to deselect **Public** when you create or edit the badge.

1. In Community Workspaces, click the Gamification tile.

2. Click the dropdown and the end of the badge's row, and click **Manage Badge Givers**.

3. In the popup window, search to add the users or public groups you want to have permission to give badges. Only those users with the Give Recognition Badges in Lightning Communities permission are available. You can remove members from the list by clicking the X by their name. Click **Save**.

Give Recognition Badges to Community Members

Giving badges to members helps reward them for staying engaged in the community.

1. Open the member's profile page.

2. Click either the **Give Badge** button at the top of the profile or the **Give** button on the Recognition Badges card.

3. Choose which badge you want to give by clicking **Change badge**.

4. Add a message letting the member know why they are getting the badge, and click **Give**.

Delete Assigned Badges

Sometimes badges are assigned to a member by mistake. If you gave the badge, you can delete it from the member's profile page.

1. Open the profile page for the member who got the badge by mistake.

2. To open the Recognition Badge list view, click **View All** under Recognition.

3. Locate the badge in the list and click the dropdown at the end of the row.

4. Click **Delete**.
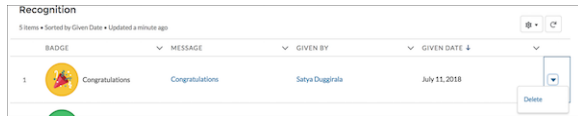
Use the API to Give Recognition Badges Sample Code

You can use the API to programmatically give recognition badges to community members.

Assign a Recognition Badge and Notify a Member Using Apex

```
ID networkID = '0DBB0000000CdBaOAK';
ID badgeDefintionID = '0W1B0000000ekuJKAQ';
ID giverID = '005B0000003InDeIAK';
ID recipientID = '005B000000483dDIAQ';
String message = 'Welcome to the community';

WorkThanks thanks = new WorkThanks (
NetworkdID=networkID
GiverID=giverID,
Message=message
);
insert thanks;

WorkBadge badge = new WorkBadge(
DefinitionId=badgeDefinitionId,
NetworkID=networkID
RecipientId=recipientID,
SourceId=thanks.id
);
insert badge;

// optional: create a Chatter post on the user profile
// showing the badge. The user will be notified through
// the standard Chatter notification mechanisms.
FeedItem feedItem = new FeedItem(
NetworkScope=networkID,
ParentId=recipientID,
RelatedRecordId=thanks.id,
Body=message,
Type='RypplePost',
Visibility='AllUsers'
);
insert feedItem;

// Unfortunately, there is a limitation in the work.com API that
// prevents these 2 lines from working:
// thanks.FeedItemID = :feedItem.id;
// update thanks;
```

Assign a Recognition Badge When a Member Reaches a Number of Reputation Points

To avoid assigning the same badge twice, we've added a custom "hasBadge_c" field on the user object.

```
trigger NetworkMemberTrigger on NetworkMember (after update) {
            for (NetworkMember nm : Trigger.New) {
                User user = [select ID, hasBadge_c from User where ID =
:nm. MemberID];
        If (nm.ReputationPonts >= 40 && !user.hasBadge_c) {
            WorkThanks thanks = new WorkThanks(
            GiverId='005B00000036ukY',
            Message='inserted by trigger',
            NetworkId=nm.NetworkId);
            insert thanks;

            WorkBadge badge = new WorkBadge(
            DefinitionId='0W1B0000000T1QBKA0',
            NetworkId=nm.NetworkId,
            RecipientId=nm.MemberId,
            SourceId=thanks.id);
            insert badge;

            user.hasBadge_c = true;
            update user;
        }
    }
}
```

Automatically Add Reputation Points When Badge Is Assigned to a Member

To avoid hardcoding the number of reputation points that are assigned with the badge, this example assumes that the WorkBadgeDefinition entity has been customized with an additional "ReputationPoints__c" field.

```
trigger WorkBadgeTrigger on WorkBadge (after insert) {
            for (WorkBadge badge : Trigger.new) {
                if (badge.DefinitionId == '0W1B0000000T1QBKA0') {
                    WorkBadgeDefinition badgeDefinition = [select Id,
ReputationPoints_c from WorkBadgeDefinition where Id =
:badge.DefinitionId];
            NetworkMember member = [select Id, ReputationPoints from
NetworkMember where MemberID = :badge.RecipientId];
            member.ReputationPoints = member.ReputationPoints +
badgeDefinition.ReputationPoints_c;
            update member;
        }
    }
}
```

Assign Recognition Badge When Member Creates Number of Posts or Comments

The ChatterActivity object contains the following useful fields:

- CommentCount
- CommentRecievedCount

67

- LikeReceivedCount
- PostCount

These counters can be used to programmatically assign badges based on various thresholds. For example, members could get a badge whenever they create 100 posts or whenever they received 100 likes.

```
trigger ChatterActivityTrigger on ChatterActivity (after update) {
            for (ChatterActivity ca : Trigger.New) {
                if (ca.PostCount >= 10) {
                        // TODO: assign badge to user if he hasn't received one already
        }
    }
}
```

Reputation Overview

Your reputation in the community directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

Your reputation level appears on your profile page and when any user hovers over your name. It's visible to other community members so that they know how influential you are. When you start out in the community, you are at the lowest level. As you become more active in the community, you gain points and your reputation level increases. Increases in reputation levels are posted to your feed. In other words, as people see you participating and sharing your knowledge, your credibility and influence grows.

These are the default actions that increase your reputation level. You increase your reputation by:

- Posting
- Commenting
- Liking a post or comment
- Sharing a post
- People sharing your posts
- People commenting on your posts
- People liking your posts or comments
- Mentioning someone
- Being mentioned
- Asking a question
- Answering a question
- Receiving an answer
- Marking an answer as best
- People marking your answer as best
- Endorsing someone for knowledge on a topic
- Being endorsed for knowledge on a topic

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

Enable Reputation in Your Community
Enable reputation in your community so that members are recognized and rewarded for participating.

Enable Reputation in Your Community

Enable reputation in your community so that members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation. Community managers know that recognition and a little friendly competition usually lead to more active members. Enabling reputation turns on a default point system and set of reputation levels in the community. A community manager can personalize labels and point values from the Community Management page.

Members start to accrue points by performing the actions that have assigned point values. Once the member exceeds the top of the level's point threshold, they move up a level. They, and other members of the community, see their reputation level on their profile and when hovering over their name. Total points also show on member's profiles.

> **Note:** When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

1. Open Community Workspaces or Community Management.

2. Click **Administration** > **Preferences**.

3. Select **Enable setup and display of reputation levels**, then click **Save**.

After you enabled reputation, a default point system and set of reputation levels is available on the Community Management page. The default reputation points are as follows:

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1
	If your post contains more than one @mention, you get a point for each @mention.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To edit Communities settings:

- Create and Set Up Communities

  AND

  Is a member of the community whose Community Management page they're trying to access.

Action	Points
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

If your selected community template doesn't have Chatter enabled, the Reputation section doesn't appear in Community Management. To show the Reputation section, go to **Administration** > **Preferences** and select **Show all settings in Community Management**.

Set Up Reputation Levels

Update the default reputation levels to meet your community's needs and help motivate your members.

When reputation is enabled for a community, 10 default levels are added. You can add or remove levels, give each level a name, and update the point range and image for each level.

📝 **Note:** A community must have at least three reputation levels and can have up to 50.

1. Open Community Workspaces or Community Management.
2. If you're using Community Workspaces, access Reputation by clicking **Administration** > **Reputation Levels**. If you're using Community Management, access Reputation by clicking **Reputation** > **Reputation Levels**.

    From here you can:

    • Upload your own image for each reputation level. Click the default image to browse to an image file and upload a new image.

        📝 **Note:** You can't revert to the default reputation level images from the Salesforce user interface. Use the Salesforce Chatter REST API to do this.

    • Give each level a name, such as "Beginner," "Intermediate," and "Expert." If you don't assign a name, the default is used. For example, "Level 1," "Level 2," "Level 3."

    • Edit the point range for a level.

        When you update the higher value of a level's point range, the lower value for the next level is automatically adjusted when you save.

    • Add more levels by clicking **Add a level**, located underneath the list of levels.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

USER PERMISSIONS

To update reputation levels:
• Manage Communities

    AND

    Is a member of the community

- Remove a level by clicking 🛇 next to the level.

3. Click **Save** to apply your changes.

You can now update the point system for the community. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions by commenting, liking, or sharing their posts. Reputation level increases are posted to member feeds.

You can translate reputation level names so that international community members can view their reputation levels in the appropriate language. In Translation Workbench, select the `Reputation Level` setup component and then expand the node next to your community.

Set Up Reputation Points

Set up a point system to reward users for participating in the community.

When reputation is enabled for a community, there is a default point system set up. When users perform the actions with assigned point values, their total points increase and they start to move towards the next reputation level.

📝 **Note:** Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

The table shows the default events and points.

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1
	If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5

Action	Points
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Questions and answers in the community feed are not to be confused with the Chatter Answers functionality.

📝 Note: In organizations with reputation enabled before the Winter '15 release, actions associated with questions and answers are available at the time of the release. Their default point values are set to 0. Existing user reputation points are not affected by the release, and users don't accrue points from these actions until you configure point values for them.

1. Open Community Workspaces or Community Management.

2. If you're using Community Workspaces, access Reputation by clicking **Administration** > **Reputation Points**. If you're using Community Management, access Reputation by clicking **Reputation** > **Reputation Points**.

3. Update the points for each action. If you don't want users to accrue points for a certain action, set the Points to *0*.

4. Click **Save**.

Point totals show up on profile pages beneath the photo. Point totals are visible to anyone in the community.

💡 Tip: You can directly update reputation points for a community member via the Salesforce API. You can also use Apex triggers to send custom notifications based on changes to reputation points.

How is my community reputation calculated?

The reputation level on your profile is calculated based on your total points.

Points are accrued when you perform activities that your community manager has assigned point values. You could also potentially gain points if your posts or comments draw reaction from other community members. For example, your community manager may have decided that writing a post earns you 5 points. If someone else shares your post, your community manager may decide that you should earn 10 points because your post is influencing others to contribute.

📝 Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

Default point values are as follows. Keep in mind that your community manager may have customized these values. For more information, contact your community manager.

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1

Action	Points
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1
	If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Community Administration

Customize your community's properties, such as name, description, URL, status, and template, in the Administration section of Community Management or Community Workspaces. You can also update your community settings, such as members, tabs, branding, login and registration, and emails.

Limit Files in Your Community

Restrict the size and types of files that your community members can upload. This whitelist of file types lets you control what your community members upload and also prevents spammers from polluting your community with inappropriate files.

Community file moderation must be enabled for your org before you can limit files in your community. If you don't see the option to limit files in Community Workspaces or Community Management, contact Salesforce.

Your community file limits apply to files uploaded by community members anywhere in the community—in posts and comments, directly in the Files tab, and also from the Salesforce app. You can also set community file limits using the SOAP API or Metadata API.

Files uploaded before setting your file limits are unaffected. However, newer versions of those files must meet the limits you specify.

Keep the following things in mind:

- A file must meet the file limits set in the community in which it's uploaded. For example, if a customer uploads a file on a case and then an agent uploads a newer version in your Salesforce internal org, the limits from the customer community still apply.

- Files uploaded in your internal Salesforce org that are shared in a community aren't subject to community file limits.

1. Open Community Workspaces or Community Management.

2. Select **Administration** > **Preferences**, then enter your limits in the Files section on the page.

   - `Maximum file size in MB`—Enter a number between 3 MB and your org's maximum file size. To use the default limit of 2 GB, leave this field empty or enter *0*.

   - `Allow only these file types`—Enter file extensions separated with a comma (for example: *jpg,docx,txt*). You can enter lowercase and uppercase letters. You can enter up to 1,000 characters. To allow all file types, leave this field empty.

3. Click **Save**.

After you set your community's file limits, members receive an error message if their file is larger than the size you set or if their file extension isn't allowed.

When a member tries to upload multiple files at once and a file is found that doesn't meet your limits, none of the files are uploaded.

RESOURCES FOR COMMUNITY MANAGERS

When you're managing a community, every extra bit of information helps. Use these resources to assist you with your daily community management duties.

success.salesforce.com

Have a question about Communities? Have a great idea about community management that Salesforce should implement? Know a lot about communities and want to help others? Visit the Salesforce Trailblazer Community and start collaborating with other Salesforce Communities users just like you! From the Salesforce Trailblazer Community you can ask questions and get answers, post ideas, view help and training offerings, collaborate with other Salesforce users and more.

Playbook: Engaging Your Customer or Partner Community

A playbook that contains strategies and tips on how to grow engagement in your community.

Playbook: Build a Thriving Community

A playbook that contains details about how to create a successful community, including the story of how the Trailblazer Community was built.

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