



Community Ideas Component User Guide

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Prerequisites

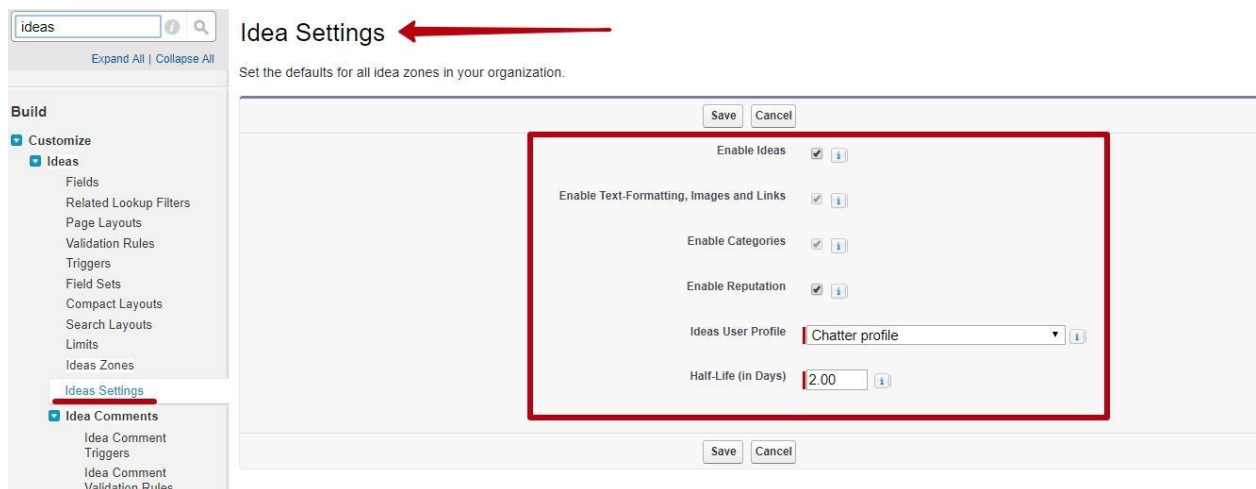
To use the Community Ideas component, you need Communities enabled on your internal org.

You must have at least one community.

You also need a custom domain configured.

Setup and Configuration

- 1) First of all, before the installation, we recommend checking the Salesforce Ideas Settings on your org. Go to **Setup** – Ideas Setting and enable all appropriate functions: Ideas, Text Formatting, Categories, and Reputation. Choose the user's profile and set the terms for when old Ideas drop in ranking. Save your changes.



- 2) Install the free Ideas component for Community Cloud from the App Exchange:
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000E9I50UAB>

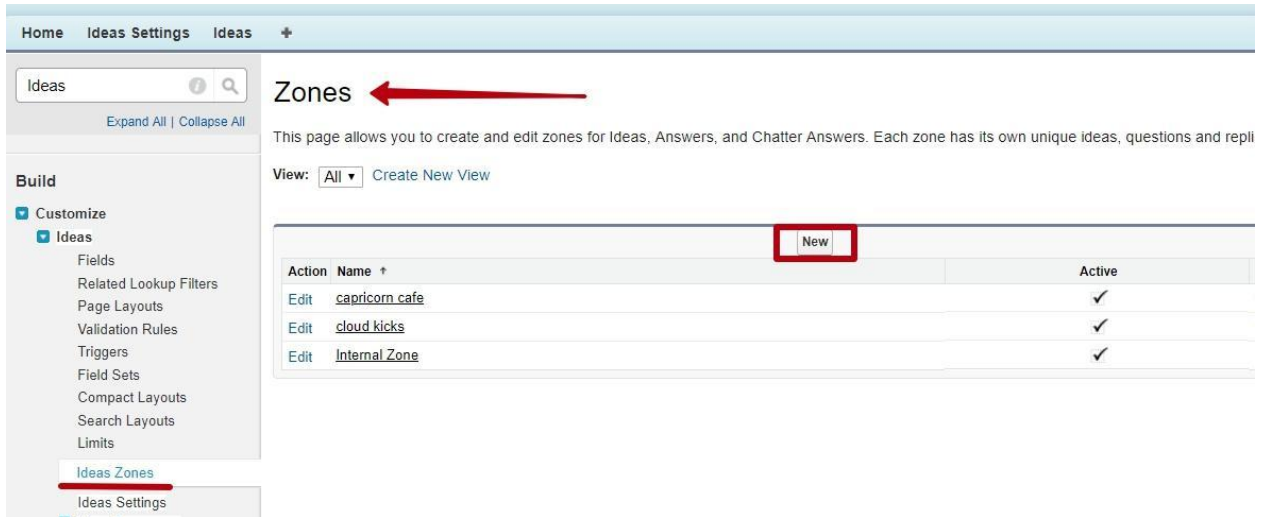
Set up Zones

Ideas Zones are used for separating different sets of ideas. You only need to set up the Ideas Zones:

- If you are using Ideas on a community and internally (to collect Ideas from your employees, for example)

- If you have two or more communities with different sets of Ideas

To create a new zone, from your internal org, go to Setup, type “Ideas” in the Quick Find box, choose “Ideas Zones” from the list on the left panel and click “New”.



The screenshot shows the 'Ideas Zones' setup page. The sidebar on the left has 'Ideas Zones' selected. The main area has a search bar with 'Ideas' and a 'Zones' header. Below the header, there is a table of existing zones. A red arrow points to the 'Zones' header, and a red box highlights the 'New' button.

Action	Name	Active
Edit	capricorn cafe	✓
Edit	cloud kicks	✓
Edit	Internal Zone	✓

Fill in the name of the zone and add a description, if you want one. Enable the “Active” checkbox and choose from the drop-down list what username format you want to be displayed in this zone.

Fill in the Visibility section. From the drop-down lists, choose the community in which this zone will be shown.

New Zone

Customize the settings for your zone.

Zone Edit Save Cancel

Name

Description

This community is for using Ideas component!

Active ☒

Username Format

First Name + Last Name

Visibility

Show in

Community

Community

Community 1

Ideas Settings

Experts Group

--None--

Save Cancel

Click Save.

Set up Categories

You can use Categories for filtering the Ideas on the community.

To create a new category, from your internal org, go to Setup, type “Ideas” in the Quick Find box, go to “Fields”, click Categories.

Home Ideas Settings Ideas +

ideas  

[Expand All](#) | [Collapse All](#)

Build

- ☒ Customize
 - ☒ Ideas
 - Fields**
 - [Related Lookup Filters](#)
 - [Page Layouts](#)
 - [Validation Rules](#)
 - [Triggers](#)
 - [Field Sets](#)
 - [Compact Layouts](#)
 - [Search Layouts](#)
 - [Limits](#)
 - [Ideas Zones](#)
 - [Ideas Settings](#)

Idea Fields

This page lists the fields that are available on Idea pages. Click a field label to view additional details such as field dependencies, validation rules, and field type.

Idea Standard Fields			
Action	Field Label	Field Name	Data Type
	Attachment	Attachment	File
Edit Replace	Categories	Categories	Picklist (Multi-Select)
	Idea Body	Body	Rich Text Area(32000)
	Idea Theme	IdeaTheme	Lookup(Idea Theme)
Edit Replace	Status	Status	Picklist
	Title	Title	Text(255)

Idea Custom Fields & Relationships [New](#)

No custom fields defined

In the Categories Picklist Values section, click New. Add categories for your Ideas component (each category on a separate line) and choose an appropriate zone.

Add Picklist Values

Categories

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

Category 1

Category 2

Category 3

To add the new value to the picklist values for a particular Zone, check the appropriate boxes below.

☐ Zone	Description
☐ Internal Zone	
☐ cloud kicks	
☐ capricorn cafe	
☒ Community 1	This zone is for testing ideas component and custom settings categories.
☐ 1	1

Save Cancel

Click Save.

Set up Statuses

It is also possible to add statuses that will be assigned to ideas on the community (for example new, old, under review, etc).

To create a new status, from your internal org, go to Setup, type "Ideas" in the Quick Find box, go to "Fields", click Status.

idea

Expand All | Collapse All

Build

Customize

Ideas

Fields

Related Lookup Filters

Page Layouts

Validation Rules

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Compact Layouts

Search Layouts

Limits

Ideas Zones

Ideas Settings

Idea Fields

This page lists the fields that are available on Idea pages. Click a field label to view additional details such as field dependencies, validation rules, and data type.

Action	Field Label	Field Name	Data Type
	Attachment	Attachment	File
Edit Replace	Categories	Categories	Picklist (Multi-Select)
	Idea Body	Body	Rich Text Area(32000)
	Idea Theme	IdeaTheme	Lookup(Idea Theme)
Edit Replace	Status	Status	Picklist
	Title	Title	Text(255)

Idea Custom Fields & Relationships

New

No custom fields defined

In the Status Picklist Values section, click New. Add statuses for your Ideas component (each status on a separate line) and choose an appropriate zone.

Add Picklist Values

Status

Add one or more picklist values below. Each value should be on its own line and it is used for both a value's label and API name.

If a value matches an inactive value's API name, that value is reactivated with its previous label.

If a value matches an inactive value's label but not the API name, a new value is created.

New
Old
Accepted
Rejected

To add the new value to the picklist values for a particular Zone, check the appropriate boxes below.

☐	Zone	Description
☐	Internal Zone	
☐	cloud kicks	
☐	capricorn cafe	
☒	Community 1	This zone is for testing ideas component and custom settings categories.
☐	1	1

Click Save.

Click Edit next to the Status name and choose a chart color for it. You can also set this status as a default one.

Picklist Edit Status

Enter a name for the picklist value below. Check the box to use this value as the default value.



Label	new
API Name	new
Default	☒ Make this value the default for the master picklist
Chart Color	Assign color dynamically

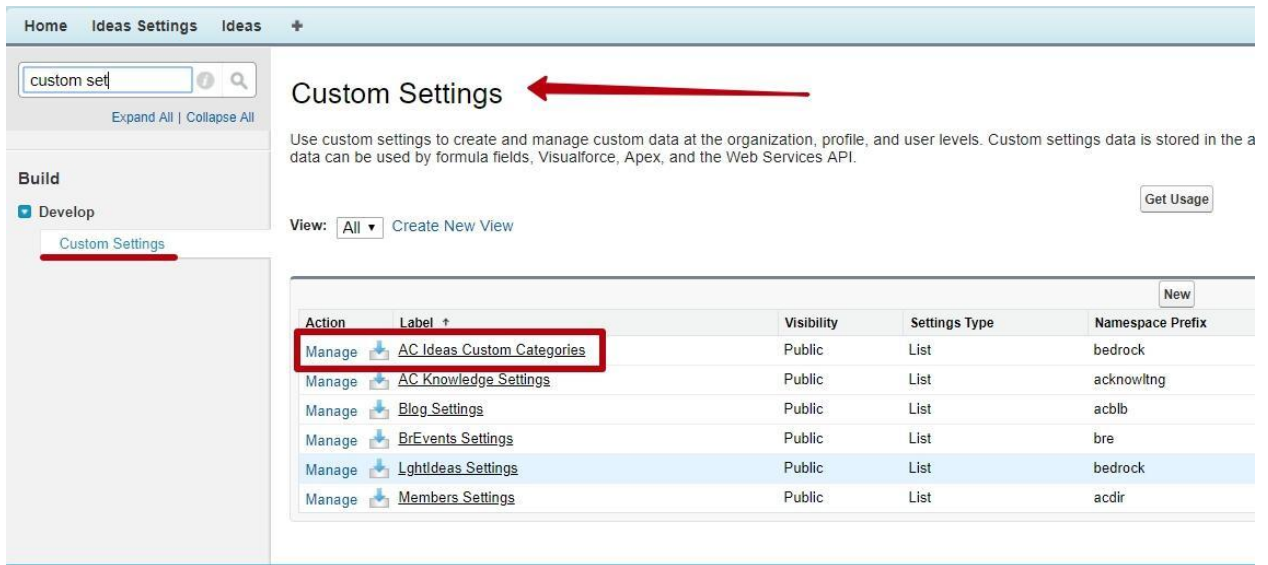
Categories Custom Settings (Configuring different categories for multiple communities)

It is possible to implement the Ideas component in several communities and have different categories for each one with the help of Ideas Zones.

Unfortunately, Salesforce does not provide a way to distinguish categories in different Zones. Therefore, we have designed a workaround, so you can create different categories for each community, using custom settings.

NOTE: Make sure you checked the “Enable Categories” checkbox in Ideas Settings (Setup – Ideas Settings – Edit – Enable Categories – Save).

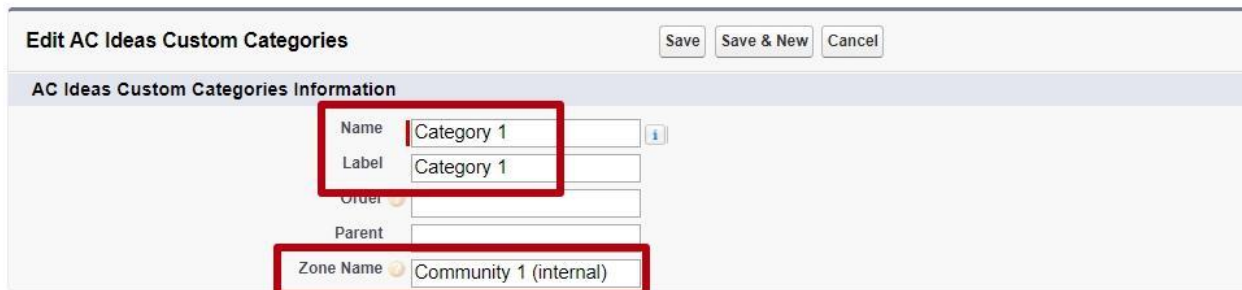
To create custom categories for different communities, go to Setup – Develop – Custom settings – click “Manage” next to AC Ideas Custom Categories.



Click New and enter a Name, Label and Zone name. The custom categories name and the label should match standard ones, as should the Zone name.

AC Ideas Custom Categories Edit

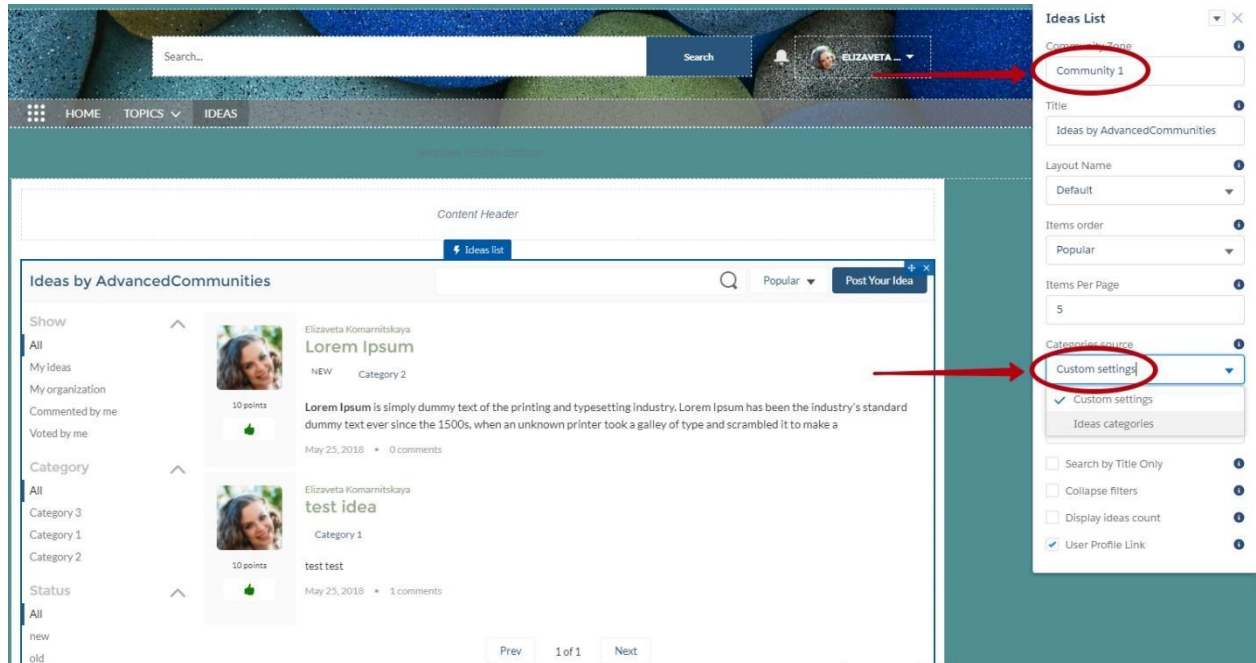
Provide values for the fields you created. This data is cached with the application.



Save your changes.

Go to Community Builder. Drag and drop the Ideas component to the page (see [Add Component to the Community and Post an Idea.](#)). In the Property Editor, type in the Community Zone name for this community, choose “Custom

Settings” from the Categories Source drop-down list. Click “Publish” to save changes.



Apex Classes Access

According to the Salesforce access restriction to @AuraEnabled Apex Methods for Guest and Portal Users, provide access for external users (including guests) to the following Apex Classes:

bedrock.CommunityCtrl
bedrock.LghtIdeasController

To set Apex class security from a profile:

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

We recommend using the Enhanced Profile User Interface to see the full list of available Apex classes!

2. Select a profile.
3. In the Apex Class Access page or related list, click **Edit**.

4. Select the Apex classes that you want to enable from the Available Apex Classes list and click **Add**.

Custom Settings Access

AC Ideas uses Custom Settings. To make this data visible for users on the community, provide them with the read access to the following custom settings:

bedrock.AC Ideas Custom Categories
bedrock.LghtIdeas Settings

Only users with Customize Application permission can provide access to custom settings.

To grant a specific profile or permission set read access to custom settings:

1. Search for Profiles or Permission Sets from Setup, then click the name of the profile or permission set.
2. Click the **Custom Setting Definitions** permission.
3. Click **Edit**, add the custom setting to the Enabled Custom Setting Definitions list, then click **Save**.

 **SETUP**
Profiles

Profile
System Administrator

 |

[Profile Overview](#) > **Custom Setting Definitions** 

Custom Setting Definitions

Available Custom Setting Definitions

ExpensesSettings
InstanceBaseUrl
Pricebook Settings
Stripe Settings
acblb.Blog Settings
acdir.Members Settings
acideas.Ideas Common Settings
acideas.Ideas Zone Settings
acknowltnng.AC Knowledge Settings
bre.BrEvents Settings
gallerydev.Gallery Settings
partdir_mp.Partner Details Setting
redwing.LMS Settings

Add



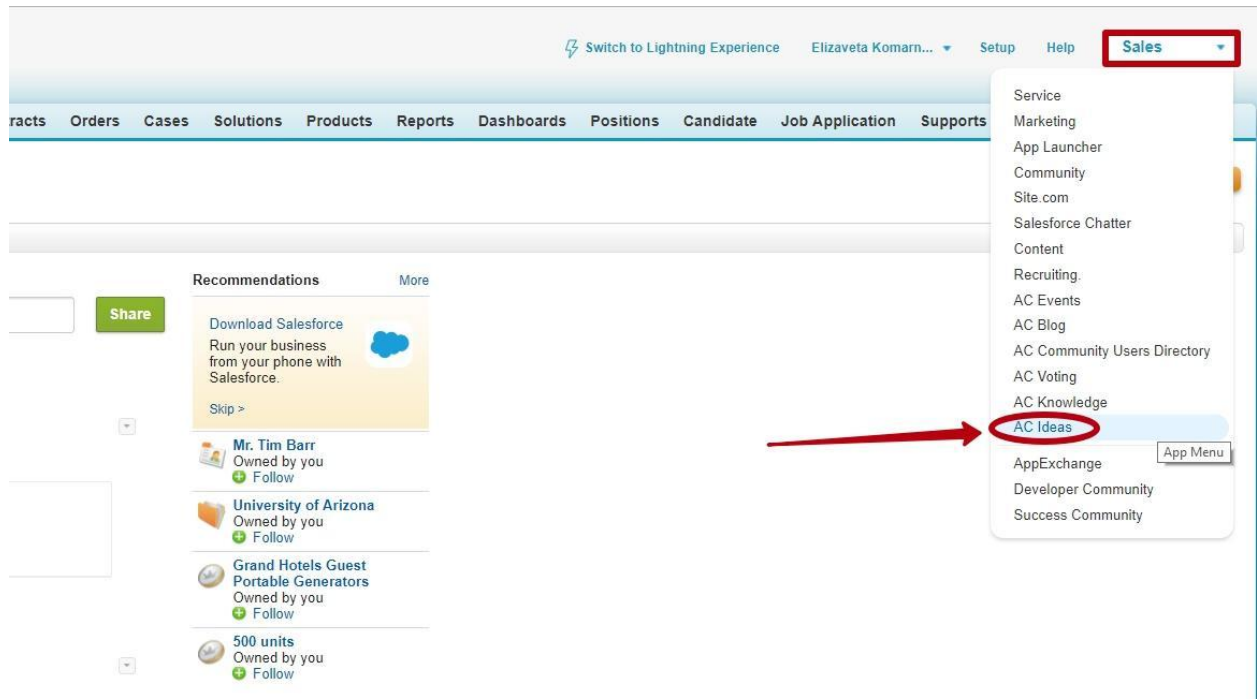
Remove

Enabled Custom Setting Definitions

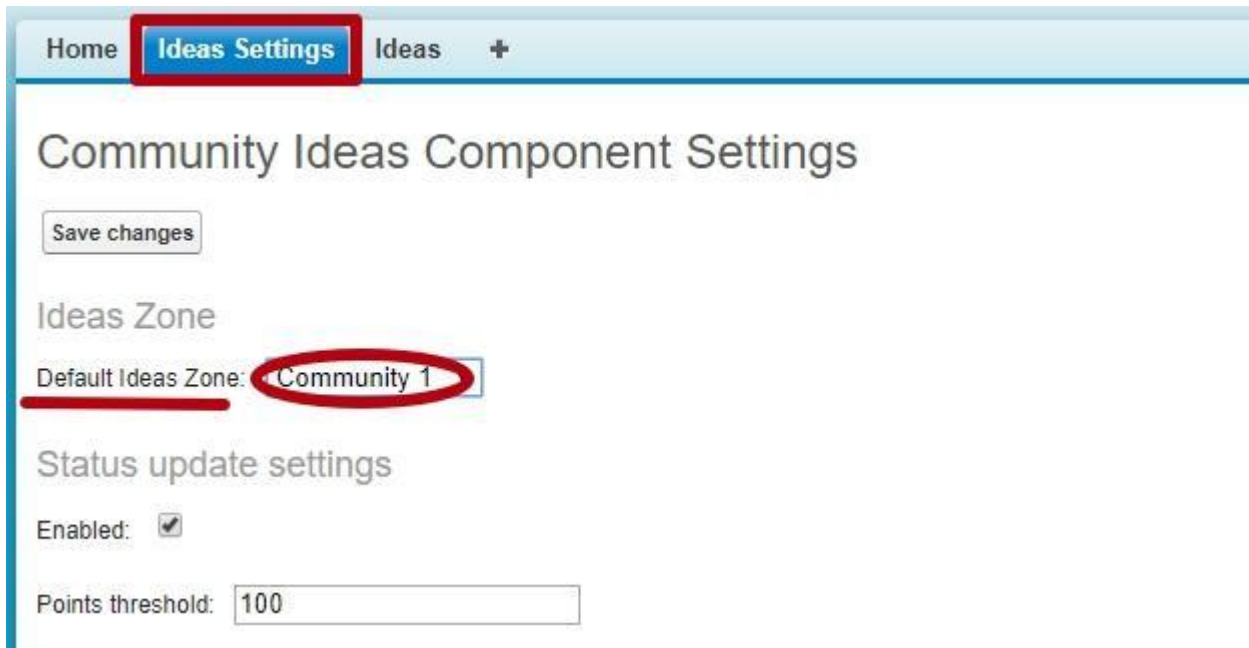
bedrock.AC Ideas Custom Categories
bedrock.LghtIdeas Settings

General Settings

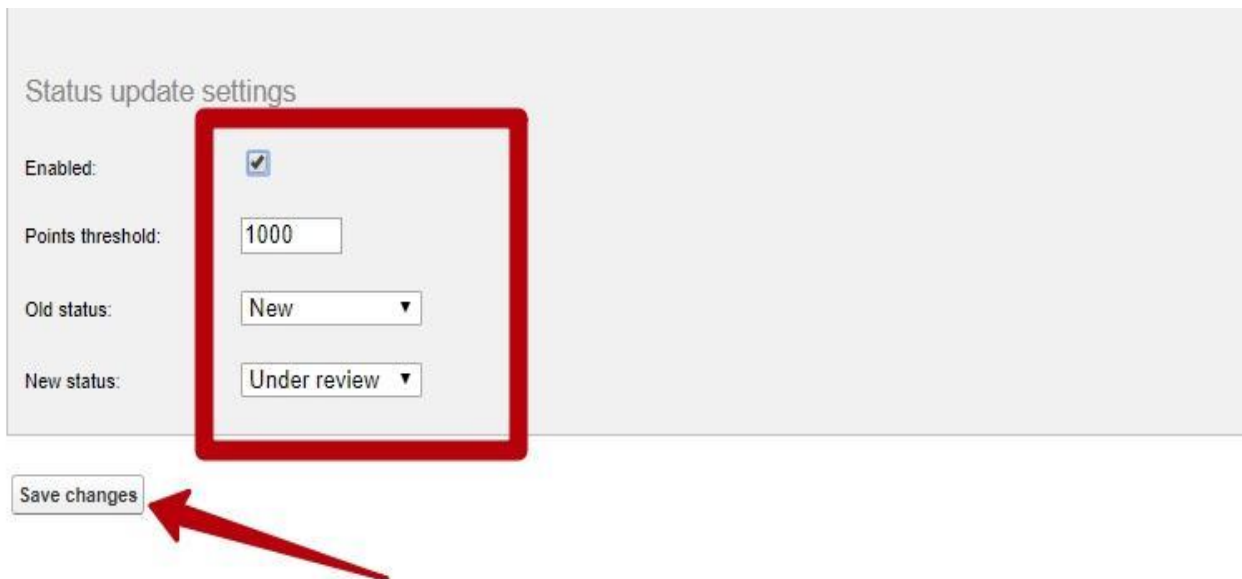
Choose the **AC Ideas** App from the Force.com App Menu.



- 1) Use the **Ideas Settings** tab to choose an appropriate zone from the Default Ideas Zone drop-down list.



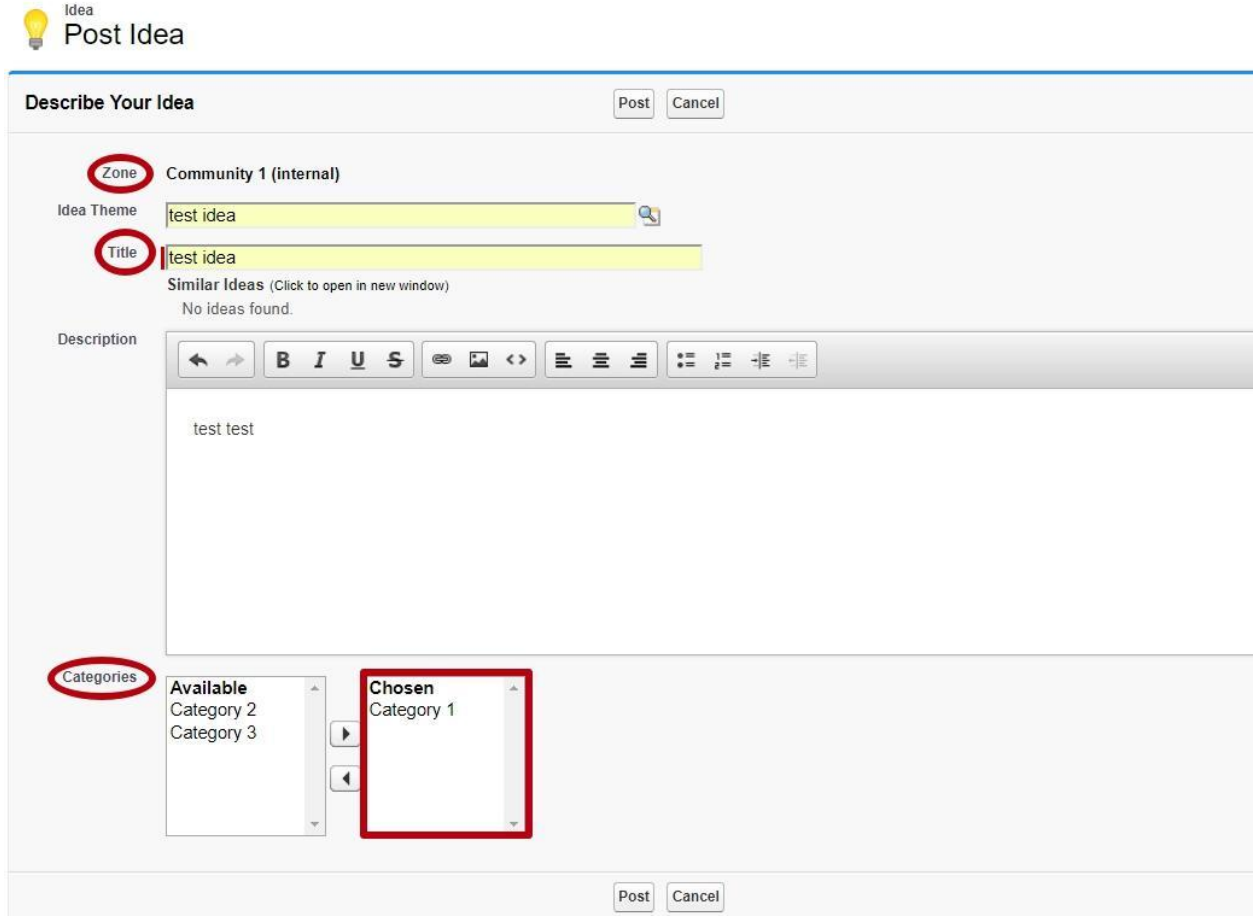
Use the Status update settings to define the votes number threshold, after which the posted Idea automatically changes its status. The most likely you have a certain threshold for changing the status from “New” to “Under consideration” or “Under review”. Use the drop-down list to set the appropriate Idea status.



Save your changes.

2) Using the **Ideas** tab, you can post, moderate, and comment on the Ideas from Salesforce org.

To add a new Idea, click Post Idea.



Idea
Post Idea

Describe Your Idea Post Cancel

Zone Community 1 (internal)

Idea Theme

Title

Similar Ideas (Click to open in new window)
No ideas found.

Description

Categories

Available
Category 2
Category 3

Chosen
Category 1

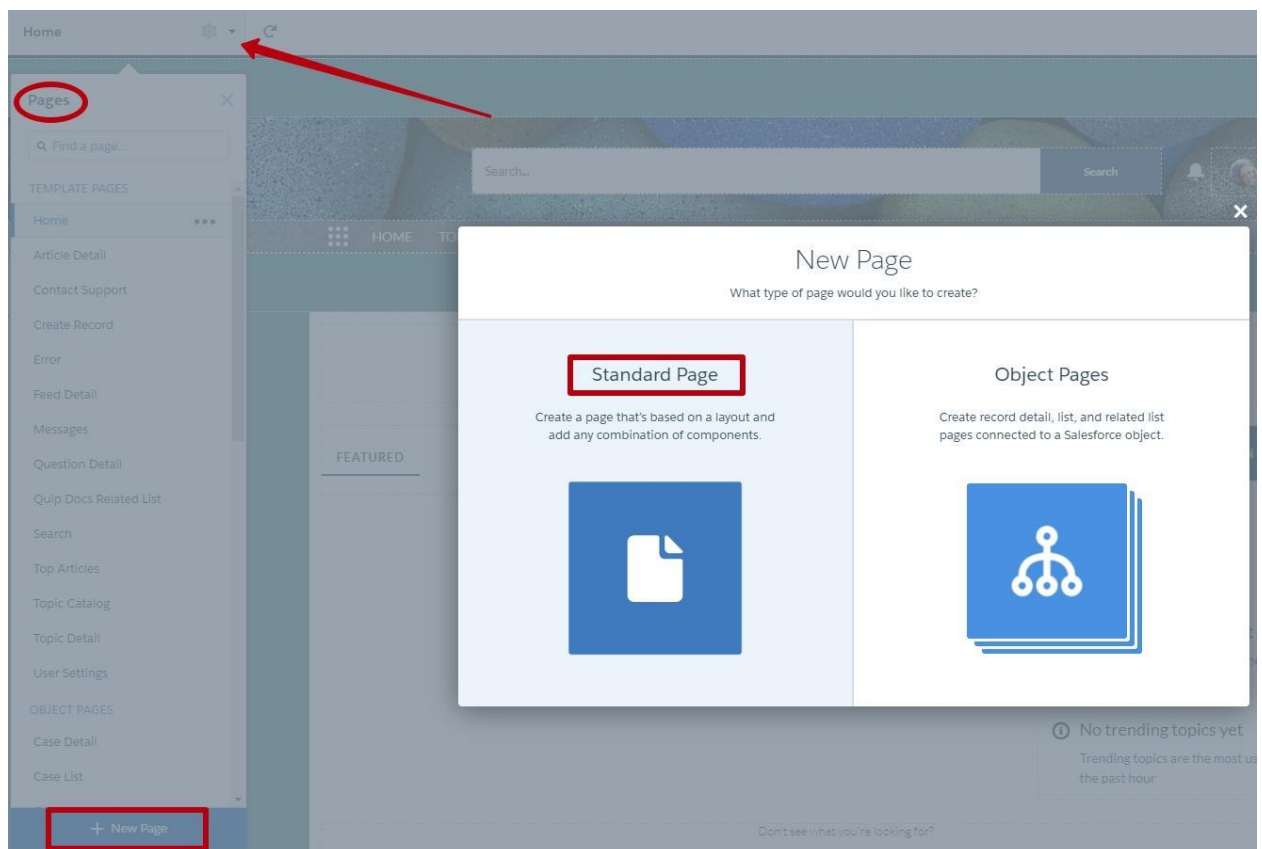
Post Cancel

Choose zone, enter a title and a description, then choose a category from those available for this zone. Post your Idea.

Community Settings

To add the Ideas component to the Community page, follow the steps below:

- 1) In the Community Builder, go to the Pages menu tab and choose New Page from the end of the list – Standard Page.



- 2) Choose a blank content layout for the new page. Click Next.

New Page

Choose a blank content layout that defines the regions of your page.

1 full-width column

2 columns, 1:2 ratio

2 columns, 1:1 ratio

2 columns, 2:1 ratio

2 columns, 2:1 ratio, split sidebar

3 columns, 1:1:2 ratio

3 columns, 1:2:1 ratio

3 columns, 1:1:1 ratio

3 columns, 2:1:1 ratio

Qulp Documents

[← Back](#)[Next](#)

3) Enter a name and click Create. Publish your changes.

New Page

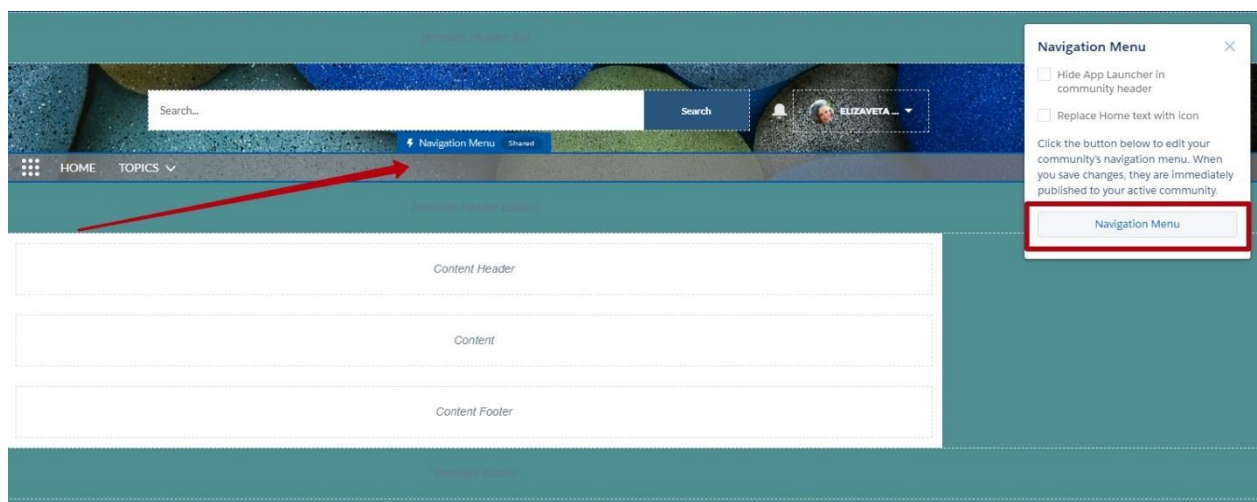
Give your page a name and a URL.

* Name

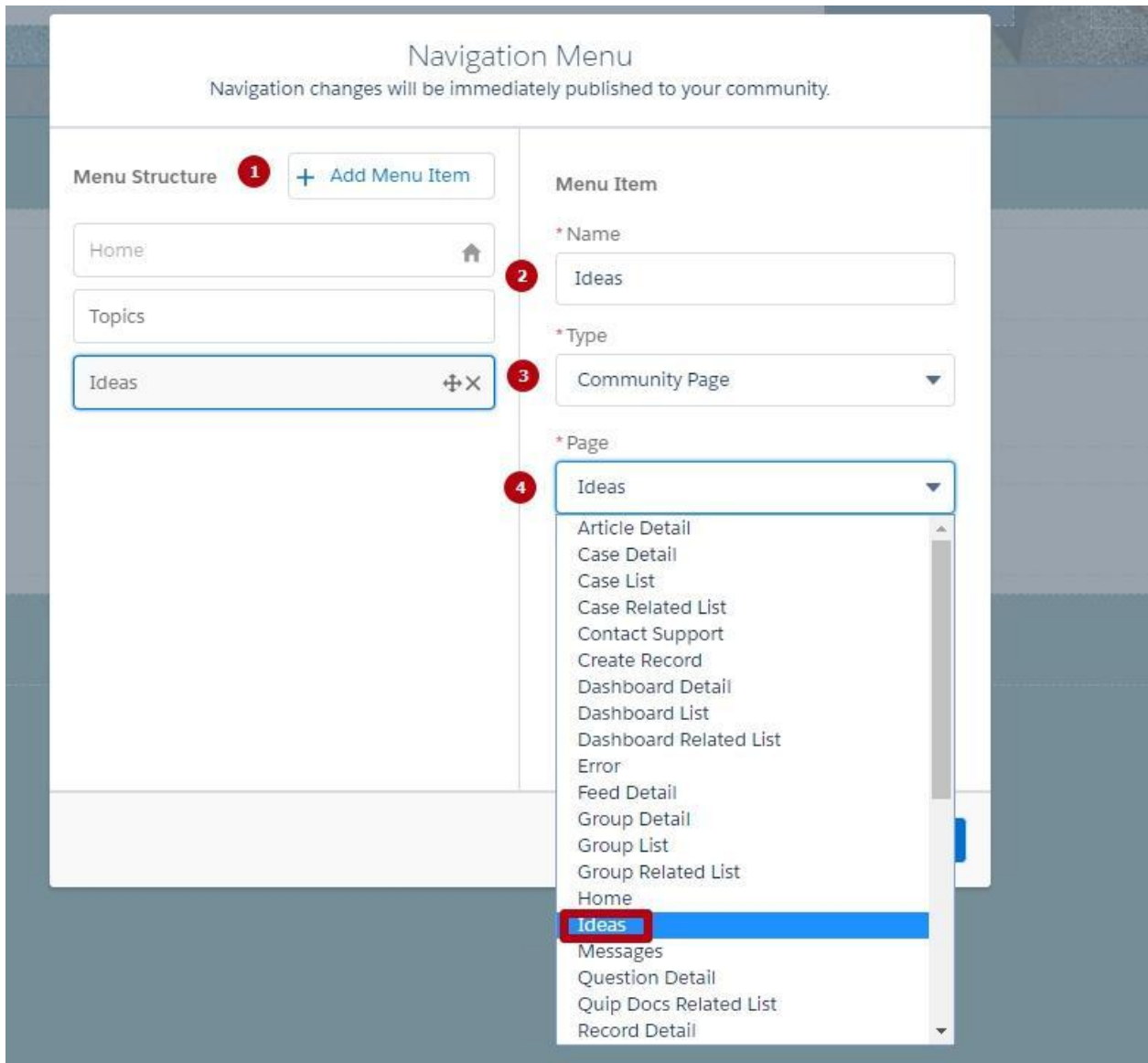
* URL

← Back
Create

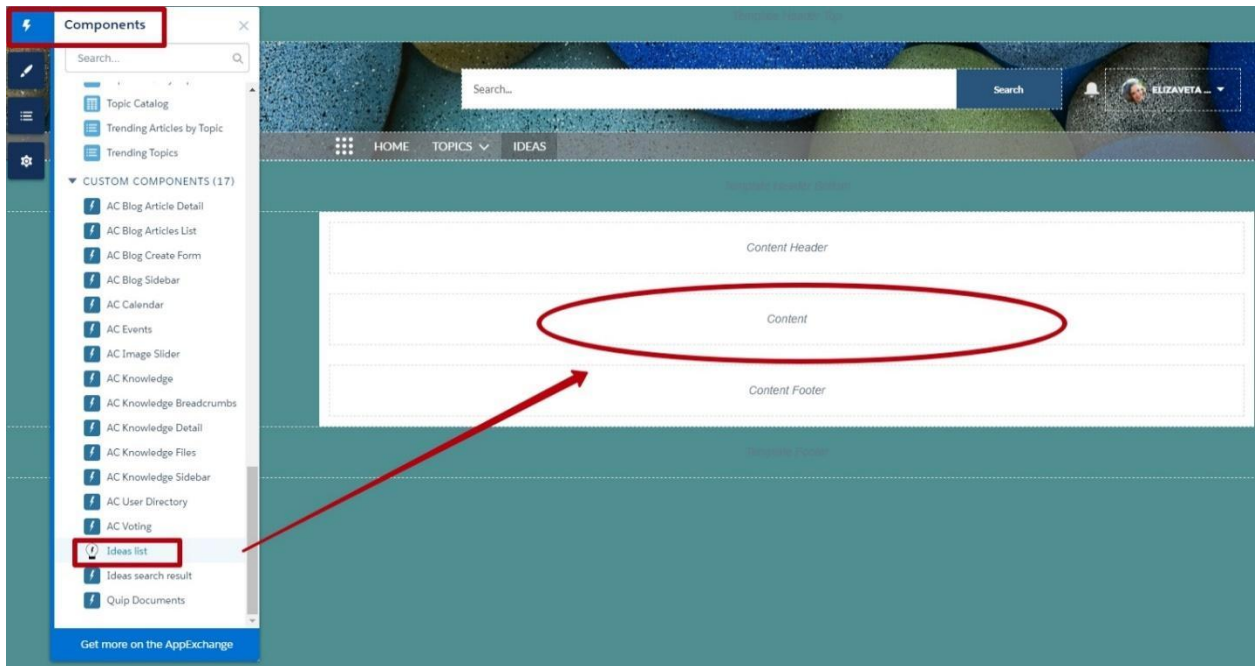
- 4) To add a page to the Navigation Menu, click on the menu element to open the Property Editor. Click on the Navigation Menu button.



- 5) 1 – Add Menu Item, 2 – Enter a Name for the Page, 3 – Select type “Community Page”, 4 – Find your recently created page in the list of available pages. Click Publish Changes.



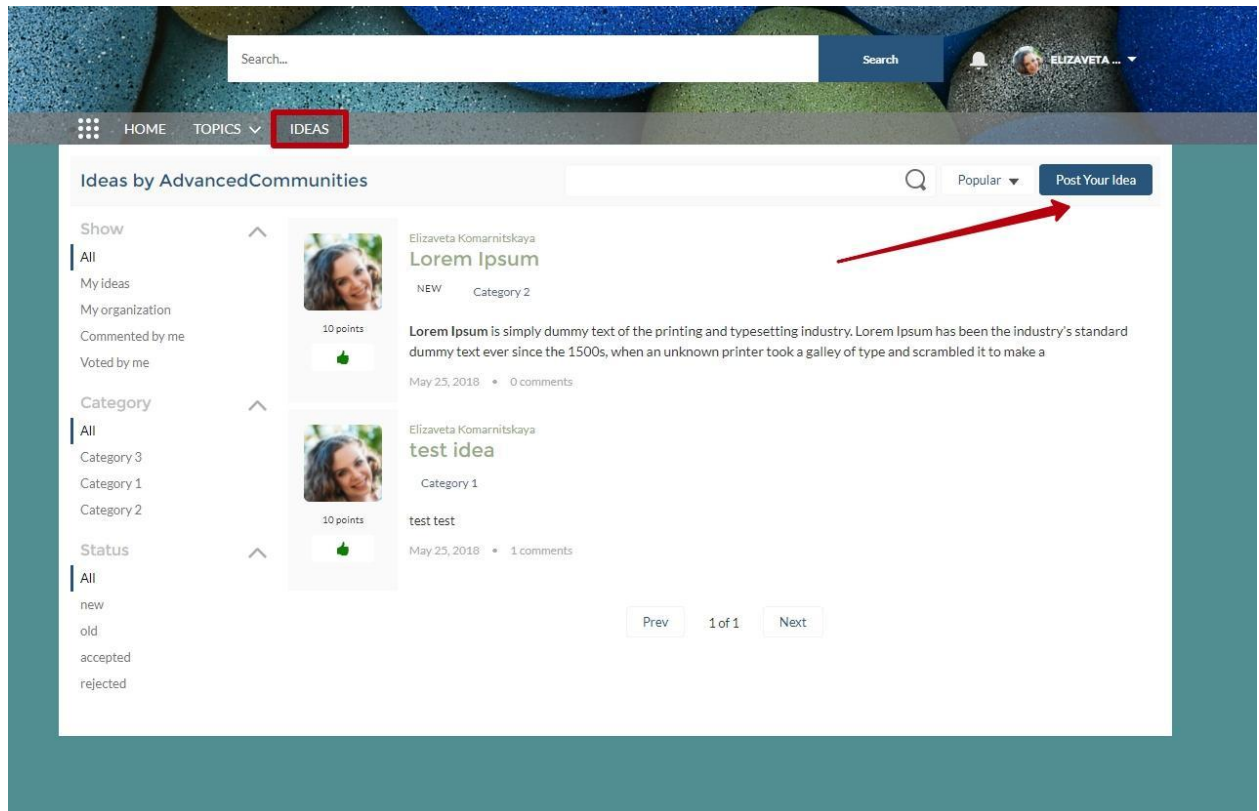
- 6) Choose the Ideas list component from the list of components on the left-side panel, and drag and drop it to the canvas.



- 7) Once you click on the component, the properties box will be opened. Here you can manage the Community Zone, layout, number of items per page and default order of Ideas, etc.

Now you can post your ideas. It can be done within the internal Salesforce org and within the community.

To add an idea on the Community, go to the page with the Ideas component and click on the “Post Your Idea” button.



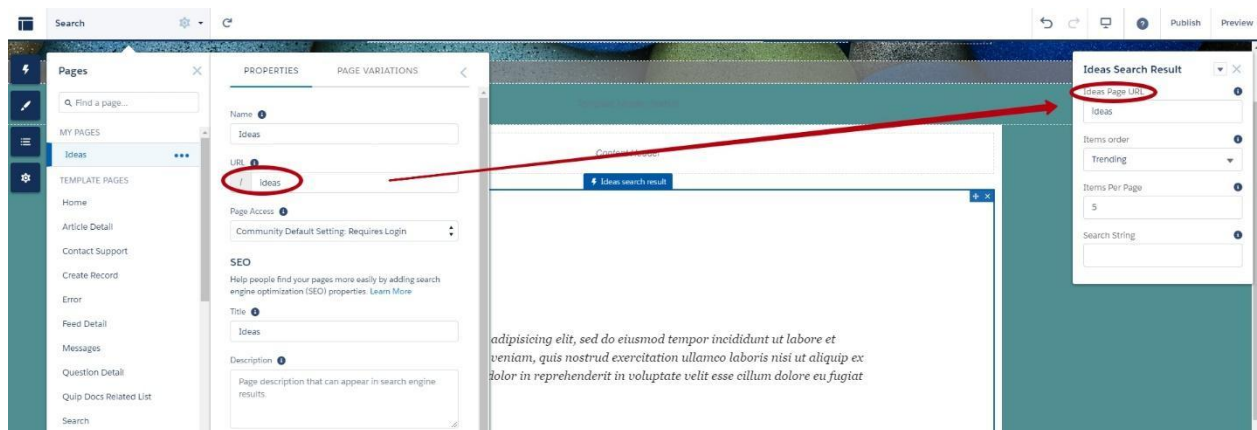
In the pop-up window, fill in the title and description, and choose a category.
Post your Idea.

Global Search Result Setting

To help users search for ideas easily, you can add the Ideas component to the Global Search Result. Follow these steps:

- 1) Open standard “Search” page from the Page menu in Community Builder.
- 2) Choose Ideas Search from the list of components on the left-side panel Result component and drag and drop it to the Search page container.
- 3) Click on the component and fill in the Ideas page URL section.

Note. To find the Ideas page URL, go to the Ideas pages properties window.





Get in Touch

Community Ideas is created and maintained by **AdvancedCommunities.com** – Community Cloud experts.

We specialise in Community Cloud customisation, development and consulting. Feel free to contact us regarding anything related to Community Cloud.

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