

IDEASTORM

SETUP AND ADMINISTRATION GUIDE

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Install and Configure IdeaStorm

Below are step-by-step instructions for installing IdeaStorm in your Salesforce organization. Note that IdeaStorm can only be used in Lightning Experience.

Requirements

- Installing user must have administrator privileges.
- Both internal and Experience Cloud users must have the ability to execute Flows

Installation

1. Navigate to [AppExchange](#) and login with your Salesforce credentials.
2. Search for IdeaStorm, then navigate to the app page.
3. Select **Get it now** to install the most recent version of IdeaStorm.
4. Choose **Install in Production** or **Install in Sandbox**.
5. Review the installation details and terms and conditions, then select the **I have read and agree to the terms and conditions** checkbox.
6. Choose **Install for Admins Only**, then click **Install**.
 - a. **IMPORTANT: We STRONGLY recommend that you install IdeaStorm for Admins only** and then provide access to users via permission set. Installing for all users gives all profiles full access to all IdeaStorm objects (including Idea Zones) by default.
7. Click **Done** to continue to your organization.
8. Once installed, assign the **IdeaStorm Admin** permission set to any users who will need to create Idea Zones and/or modify the configuration.
9. Assign the **IdeaStorm User** permission set to any users who will be creating and/or voting on Ideas.
 - a. For ease of maintenance, you may want to add this permission set to existing permission set groups and/or user access policies.

Configuration

1. In your Salesforce organization, navigate to the **IdeaStorm Setup** tab.
2. Review the configuration options listed within each section and edit as desired. More detail on advanced configuration aspects is provided in subsequent sections of this guide.
3. Once you are finished making your changes, click **Save**.

Configuration Options

- **Vote Settings**
 - **Default Vote Point Value:** Default number of points for each Idea Vote.
 - Default value: 10
 - **Show Idea Vote Modal Button*:** If checked, the Idea Vote modal button is shown for every Idea between the upvote and downvote buttons
 - Default value: unchecked
 - **Disable Downvoting*:** If checked, the downvote button will not be visible on an Idea record.
 - Default value: unchecked
 - **Prevent Voting on Statuses:** Ideas with the selected statuses will have their voting buttons disabled, and will be filtered out by default in the Idea Browser
 - Default value: Merged, Closed

- Idea Merging
 - **Require Approval Before Merging Ideas:** If checked, requests to merge similar Ideas will create an Idea Merge Request record which is sent to the Queue specified in “Idea Merge Request Approvers Queue Name”
 - Default value: unchecked
 - **Idea Merge Request Approvers Queue Name:** API name of the queue to which Idea Merge Requests are routed for review
 - Default value: (none)
- Duplicate Idea Detection
 - **Minimum Keywords Required to Check for Duplicates:** Indicates how many keywords must match between the name of an Idea being created and the name of an existing idea in order for the existing Idea to appear as a potential duplicate during creation of the new Idea
 - Default value: 2
 - **Search for Duplicates Across Zones:** When checked, duplicate checking is performed for Ideas across all Idea Zones, not just the Idea Zone selected for the Idea being created.
 - Default value: unchecked
- Flow Customization
 - **New Idea Screen Flow API Name:** API name of the screen flow which is used with the New Idea button on the Idea Browser tab
 - Default value: CSS_IdeaStorm__Idea_Creation
 - **New Idea Vote Screen Flow API Name:** API name of the screen flow which is used with the Idea Vote modal button when the “Show Idea Vote Modal Button” setting is enabled either in the IdeaStorm Configuration custom metadata, or on an Idea Zone record, when the global configuration is overridden for that Idea Zone.
 - Default Value: CSS_IdeaStorm__Idea_Vote_Creation

*Indicates a setting which can be overridden for individual Idea Zones

Configuring Permissions

Permissions for IdeaStorm can be configured one of two ways:

1. Assign the IdeaStorm Admin or IdeaStorm User permission sets to users who we be administering and/or using IdeaStorm.
2. Assigning the appropriate permissions to your custom profiles. No IdeaStorm functionality is dependent on having the included permission sets assigned. You are free to assign permissions to your own profiles as desired.

Here are the permissions provided with each of the included permission sets (all components in CSS_IdeaStorm namespace):

Permission	IdeaStorm Admin	IdeaStorm Zone Admin	IdeaStorm User
Apex Classes	SetupController, IdeaUtilities	IdeaUtilities	IdeaUtilities
Apps	IdeaStorm	IdeaStorm	IdeaStorm
Tabs	IdeaStorm Setup, Idea Browser, Roadmap Explorer, Idea Merge Request, Idea Zone, Idea: • Visible	Idea Browser, Roadmap Explorer, Idea Merge Request, Idea Zone, Idea: • Visible	Idea Browser, Roadmap Explorer, Idea Merge Request, Idea Zone, Idea: • Visible

Objects	Idea Merge Request, Idea Zone, Idea, Idea Vote: • Create • Read • Edit • Delete • View All • Modify All	Idea Zone: • Create • Read • Edit • Delete Idea Merge Request: • Create • Read • Edit • Delete Idea Vote: • Create • Read • Edit • Delete Idea: • Create • Read • Edit • Delete	Idea Zone: • Read Idea Merge Request: • Create • Read Idea Vote: • Create • Read • Edit • Delete Idea: • Create • Read • Edit • Delete
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Idea Zones

Create Idea Zones

To create a new Idea Zone:

1. From the app launcher, Navigate to the **Idea Zones** tab.
2. Click on **New**.
3. Entire the Idea Zone Name and click **Save**.

Override Global Configuration for an Individual Idea Zone

To override the global configuration for an Idea Zone:

1. On the Idea Zone record page, click **Edit**.
2. Check the **Override Global Settings Configuration** checkbox.
3. Adjust the settings as desired for your Idea Zone (See the *Configuration Options* section of this guide for more information on individual settings).
4. Click **Save**.

Ideas

Creating Ideas

To create a new Idea:

1. Navigate to the **Idea Browser** tab.
2. Click on the **New Idea** button.

3. Enter the **Idea Zone**, **Idea Name**, and **Description**. Optionally, you can also select **Categories** that apply to your Idea.
 - a. **Note:** If there are similarly-named Ideas to the one you are entering, they will show up at the bottom of the modal window.
4. Click **Next** and you will be redirected to the record page for your Idea.

Voting on Ideas

You can upvote or downvote an Idea one of two ways:

1. From the Idea Browser tab, by clicking the upvote or downvote button.
2. From the Idea record page, by clicking the upvote or downvote button at the top of the right column.

Voting for an Idea on Behalf of an Account

When the **Show Idea Vote Modal Button** is enabled (either globally or for an Idea Zone), you can vote for an Idea on behalf of an Account by doing the following:

1. Click the modal/form button (available from the **Idea Browser** tab or the Idea record page).
2. Select the **Type** and the **Account** then click **Submit**.
 - a. **Note:** If the **New Idea Vote Screen Flow API Name** is overridden from the default, your procedure may differ for this step.

Merging Ideas

If you identify two similar Ideas, you may merge one of the Ideas into the other. In this case, one of the Ideas being merged becomes the “child”, and the other becomes the “parent”. After merging, the child Idea will not be able to receive new Idea Votes.

To merge a child Idea into a parent Idea, do the following:

1. Navigate to the child Idea and click **Merge Idea**.
2. In the **Duplicate Idea** lookup field, enter the name of the parent Idea.
3. Click Next. Depending on the **Require Approval Before Merging Ideas** setting in the global configuration, one of two things will happen:
 - a. If **Require Approval Before Merging Ideas** is enabled, an Idea Merge Request record will be created. You will receive an email notification once it has been approved or declined.
 - b. If **Require Approval Before Merging Ideas** is disabled, the child idea will automatically be merged into the parent Idea.

Idea Merge Requests

Note: This section is only relevant if **Require Approval Before Merging Ideas** is enabled in the IdeaStorm Configuration

When an Idea Merge Request is submitted, it is assigned to the queue specified in the **Idea Merge Request Approvers Queue Name** setting. Queue members can then approve or decline the request as appropriate. If declined, comments must be entered and will be sent to the submitter of the request.

Search for Existing Ideas

There are several ways to filter and sort Ideas from the **Idea Browser** tab:

Show:

- **All Ideas:** Show all Ideas matching criteria in **Filters** sidebar

- **My Ideas:** Shows Ideas created by the current user.
- **Ideas I Voted On:** Shows Ideas for which the current user has submitted a vote.
- **Roadmapped Ideas:** Shows Ideas which are visible on Roadmap Explorer.

Sort By:

- **Popular Ideas:** Orders Ideas by how recently an Idea Vote was submitted.
- **Recent Ideas:** Orders Ideas by created date.
- **Top All-Time:** Orders Ideas by points.

Filters:

- **Search Ideas...:** Shows only Ideas containing the search string
- **Status:** Shows only Ideas in the selected status(es)
- **Category:** Shows only Ideas with categories matching the selected criteria

Roadmap Explorer

Adding Ideas to Roadmap Explorer

Note: To add Ideas to Roadmap Explorer, a user must have either the **IdeaStorm Admin** or **IdeaStorm Zone Admin** permission set or otherwise have edit access to both the **Show on Roadmap Explorer** and **Roadmap Status** fields on the Idea object.

To add an Idea to Roadmap Explorer:

1. Navigate to an Idea record and check **Show on Roadmap Explorer**. The **Roadmap Status** field becomes required.
2. Select a **Roadmap Status** value and save the Idea.
3. The Idea will now be visible on Roadmap Explorer

Update the Roadmap Status for an Idea on Roadmap Explorer

Note: To edit the Roadmap Status for an Idea via drag-and-drop on the Roadmap Explorer tab, a user must have edit rights on the Roadmap Status field, as well as edit access on the Idea record itself.

To edit the Roadmap Status value on an Idea, users can:

- Edit the value directly on the Idea record page, or
- Drag and drop the Idea to the desired Roadmap Status column on the Roadmap Explorer tab

Show a Release Target for an Idea on Roadmap Explorer

To show a release target for an Idea on Roadmap Explorer:

1. Navigate to an Idea that is currently visible on Roadmap Explorer (if needed, reference the above steps to add it to Roadmap Explorer)
2. Edit the Idea and enter a value for the Roadmap Release Target field. Save the Idea
3. The Roadmap Release Target value for the Idea will now be visible on Roadmap Explorer

Advanced IdeaStorm Configuration

Adding more Fields to the Modal Vote Uniqueness Check

To add fields to the uniqueness check for modal votes (e.g. ensuring that a combination of Account and Contact fields are unique):

1. Navigate to **Setup > Object Manager > Idea Vote > Field Sets > Enforce Uniqueness By Fields**.
2. Add/remove fields as desired.

Configuring a Custom Screen Flow for Idea Creation

To use a custom screen flow for creating an Idea:

1. In the screen flow, add an input variable named **zoneId** (case-sensitive) with **Data Type = Text**. This is the ID of the Idea Zone record the user currently has selected in the Idea Browser tab.
2. Add an output variable name **newIdeaId** (case-sensitive) with **Data Type = Text**. This is the ID of the Idea being created, and is used to redirect the user to the Idea once the Flow is finished.
3. Optionally, you may add the **Idea Creation Form** component to one of your Flow screens. This component captures the Idea Zone, Idea Name, Description, and Categories. It also displays any potential duplicate Ideas, based on similarity of Idea Names.

Configuring a Custom Screen Flow for Idea Vote Creation

To use a custom screen flow for submitting an Idea Vote:

1. In the screen flow, add an input variable named **ideaId** (case-sensitive) with **Data Type = Text**. This is the ID for which the Idea Vote is being submitted.