

CN IDEAS INSTALLATION GUIDE



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Before you proceed

Before executing post installation steps in this document, CN Ideas package needs to be installed on the target Salesforce Org.

Certain steps in this document may not be required to be executed depending on state of the Salesforce Org on which CN Ideas is being configured. This document explicitly calls out at such places to define the conditions in which those steps can be skipped.

Post Installations Steps

Step1 is required only if the target org doesn't have Digital Experience enabled. If the target org is already enabled for using Digital experiences, Step1 can be skipped.

- Step1: Digital Experiences should be enabled in setup if it's not enabled: (Setup – Quick Find / Search box – Digital Experiences – Settings - Enable Digital Experiences – Save).

The screenshot shows the Salesforce Setup interface. On the left is a navigation sidebar with a search bar and a list of setup items including 'Setup Assistant', 'Identity Authentication Assistant', 'Updates', 'Digital Experience Transition Kit', 'Salesforce Mobile App QuickStart', 'Usage', 'Error', 'Illustration', 'Sales', 'Email', and 'CRM Tools'. The main content area is titled 'Settings' with a gear icon. Below the title is a 'Save' button. The section is 'Enable Digital Experiences' and includes a red warning icon and the text 'Required Information'. A message states: 'After you enable digital experiences in your org, you must still create, configure, customize, and then activate a site before it's live and available to users.' Below this, the checkbox 'Enable Digital Experiences' is checked and highlighted in yellow. The next section is 'Select a domain name' with an important note: 'Important: The domain name is used in all of your digital experiences and can't be changed after you save it.' A diagram shows a 'Sample Domain Name' (cneuronsideasuat-dev-ed.develop.my.site.com) branching into three 'Sample Experience URLs': cneuronsideasuat-dev-ed.develop.my.site.com/customers, cneuronsideasuat-dev-ed.develop.my.site.com/developers, and cneuronsideasuat-dev-ed.develop.my.site.com/partners. At the bottom, the 'Domain Name' is set to cneuronsideasuat-dev-ed.develop.my.site.com, and there is a 'Save' button.

Step2 is required to be executed only when the target org doesn't have any Customer Community Profile configured for community users. In case the target org is already having any custom Customer Community User profile OR if you wish to use Salesforce Standard **Customer Community Profile**, Step2 can be skipped.

- Step2: Clone the standard **Customer Community User Profile**. All community users of **CN Ideas** users will be using this profile.

Cloning Profile: From Setup, search for "Profile" in Quick find box and click on "Profile". And Click on **Clone** next to **Customer Community User**.

The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar has a search bar with 'profile' entered and a list of tabs including 'Users' and 'Profiles'. The 'Profiles' tab is selected. The main content area displays a table of profiles. The 'Customer Community User' profile is highlighted, and the 'Clone' button next to it is circled in red.

Action	Profile Name	User License	Custom
☐ Edit Del ...	Custom_Sales_Profile	Salesforce	☒
☐ Edit Del ...	Custom_Support_Profile	Salesforce	☒
☐ Edit Clone	Customer_Community_Login_User	Customer Community Login	☐
☐ Edit Clone	Customer_Community_Plus_Login_User	Customer Community Plus Login	☐
☐ Edit Clone	Customer_Community_Plus_User	Customer Community Plus	☐
☐ Edit Clone	Customer_Community_User	Customer Community	☐
☐ Edit Clone	Customer_Portal_Manager_Custom	Customer Portal Manager Custom	☐
☐ Edit Clone	Customer_Portal_Manager_Standard	Customer Portal Manager Standard	☐
☐ Edit Clone	External_Apps_Login_User	External Apps Login	☐
☐ Edit Clone	External_Identity_User	External Identity	☐
☐ Edit Clone	Force.com_App_Subscription_User	Force.com - App Subscription	☐
☐ Edit Clone	Force.com - Free User	Force.com - Free	☐
☐ Edit Clone	Gold_Partner_User	Gold Partner	☐
☐ Edit Clone	High_Volume_Customer_Portal	High Volume Customer Portal	☐
☐ Edit Clone	High_Volume_Customer_Portal_User	High Volume Customer Portal	☐

- Give a Name and click on Save.

The screenshot shows the Salesforce Setup interface for Cloning a Profile. The left sidebar has a search bar with 'profile' entered and a list of tabs including 'Users' and 'Profiles'. The 'Profiles' tab is selected. The main content area displays the 'Clone Profile' form. The 'Existing Profile' is 'Customer Community User' and the 'Profile Name' is 'Ideas Community'. The 'Save' button is circled in red.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	User License
Customer Community User	Customer Community
Profile Name	Ideas Community

Modify Contact Page Layout

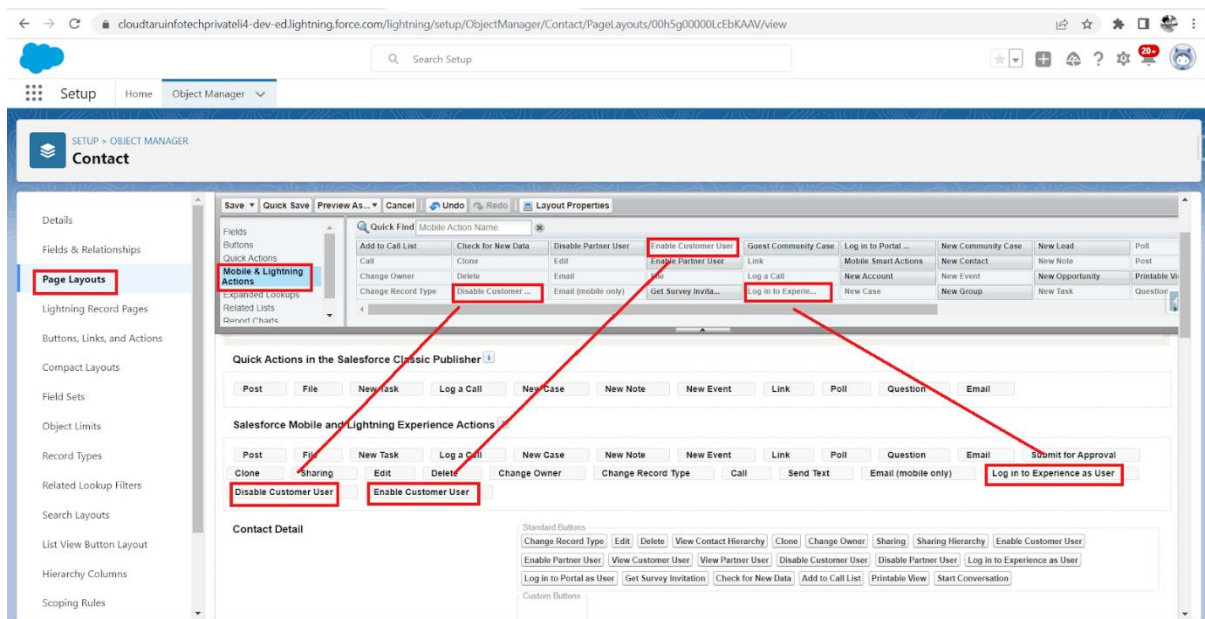
Step3 is required to be executed only when the target org doesn't have the buttons 'Enable Customer User', 'Disable Customer User' and 'Log in to Experience as User' added in the any of the Contact Page Layout. In case any of the Contact Page layouts are already having these buttons added, Step3 can be skipped.

Step3: Add buttons to enable/disable contacts as Customer Community Users

- Before creating Community user, make sure that “**Enable Customer User**, **Disable Customer User** and **Log in to Experience as User**” buttons added to the **Contact** page layout so that we can use it later.
- From Setup, click on **Object Manager** then search for **Contact** and click on it
- Now, Click on **Page Layouts** and then click on **Contact Layout**.
- Click on “**Mobile and Lightning Actions**”. Drag “**Enable Customer User**, **Disable Customer User** and **Log in to Experience as User**” Action Buttons to the “**Salesforce Mobile and Lightning Experience Actions**” and save.

Note: if required, click on **override the predefined actions** link while editing the Page layout

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.



Create a Community User

Step4 is required to be executed only when the target org doesn't have any community users. In case the target org is already enabled for community users and the CN Ideas Component is to be enabled for the same set of users, Step4 can be skipped.

Step4: Create community user who can access the CN Ideas app using Community.

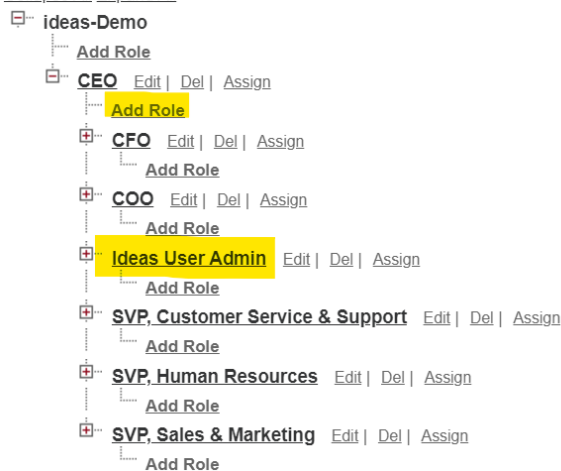
Step4a is required to be executed only when the target org doesn't have any user configured to manage Customer Community Users. In case the target org is already having any designated user to manage/configure Customer Community users, Step4a can be skipped. Below steps enable the admin user to manage Customer Community users

- Step4a: Create a new role to be used by the user who is going to manage your Customer Community Users.
- Go to Setup → Roles → Click on **Setup Roles** button if needed.
- Add a new Role 'Ideas User Admin' under CEO Role, by clicking on **Add Role** button under **CEO** Role.

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

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



- Go to Setup -> Users—> Select Any user whose Profile is System Administrator. Edit the user to select Role on the user record.

Users

User Edit
ideas Demo

User Edit [Save] [Save & New] [Cancel]

General Information ⓘ = Required Information

First Name	ideas	Role	Ideas User Admin
Last Name	Demo	User License	Salesforce
Alias	iDemo	Profile	System Administrator
Email	salesforce@cloudneurons.c	Active	☒
Username	ideas-demo@cloudneurons	Marketing User	☒
Nickname	User168010615227391275 ⓘ	Offline User	☒

- Save the User record by clicking Save button.

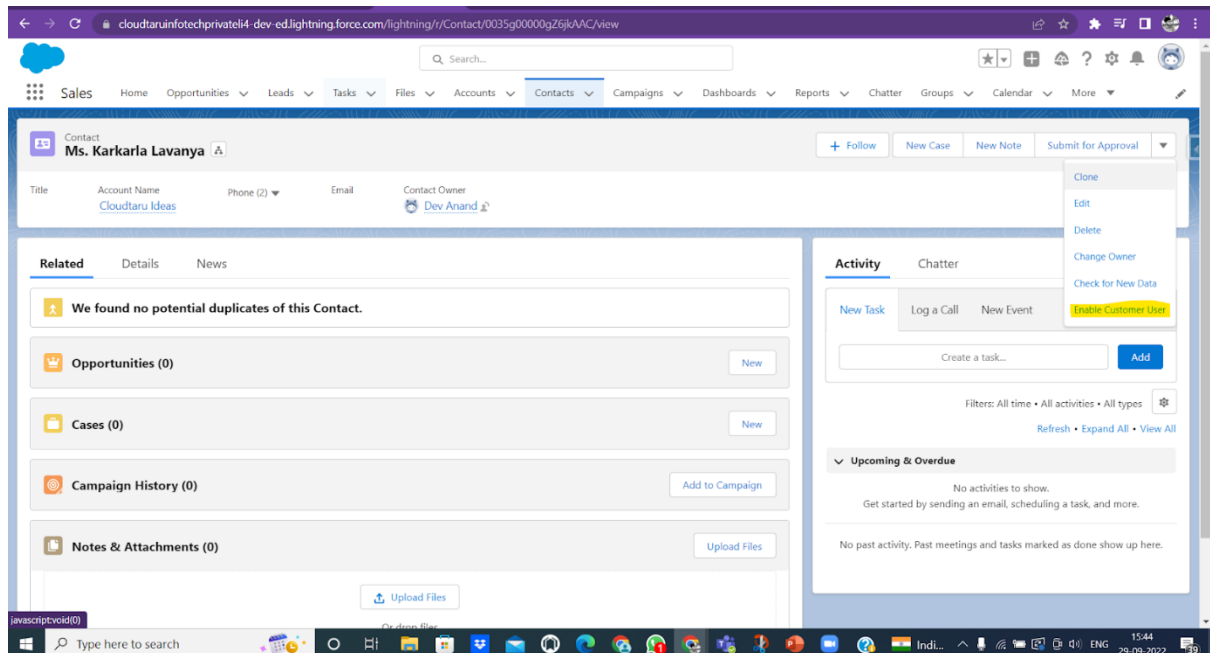
Step4b: Create a new Contact or use an existing contact with Account to be enabled as Customer Community User

- To create Customer Community licensed user, create a Contact with an account OR use one of the existing Contacts. Go to App Launcher and search for **Contact** and click on it.
- Open **All Contacts** list view to select an existing Contact OR to create a new Contact

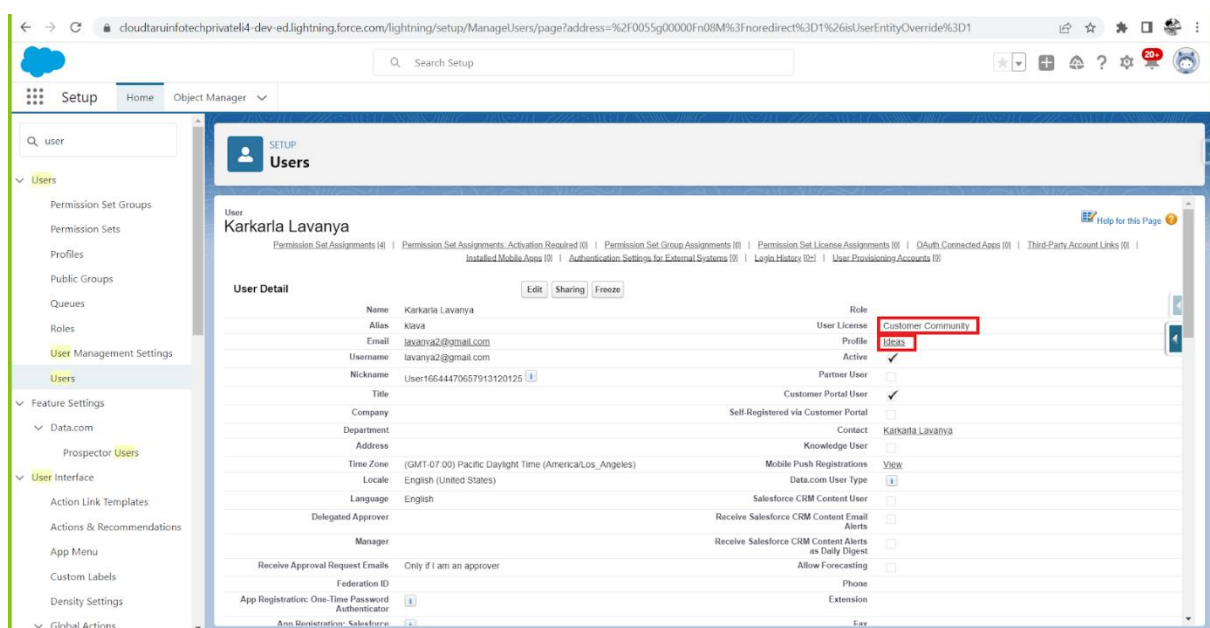
	Name	Account Name	Account Site	Phone	Email	Contact Owner Alias
1	Karkaria Lavanya	Cloudtaru Ideas				Danand
2	Yashwanth	Cloudtaru Ideas				Danand
3	Mounika Biradar	Cloudtaru Ideas				Danand

Note: In case, you are creating a new Contact, Click on 'New' button, provide Required fields on Contact Create page along with Account and Email Address details. Email Address for this Contact needs to be a valid email.

Once you are on the required Contact Detail Page, click on **“Enable Customer User”** button from the drop down at top right corner.



- You will be redirected to the Users Page with first name and last name included. Now, Select License as “Customer Community”, and select appropriate Customer Community Profile available in the Org. You may select either Standard ‘Customer Community Profile’ OR custom profile created in [Step2](#) of this document.
- Click on Save.

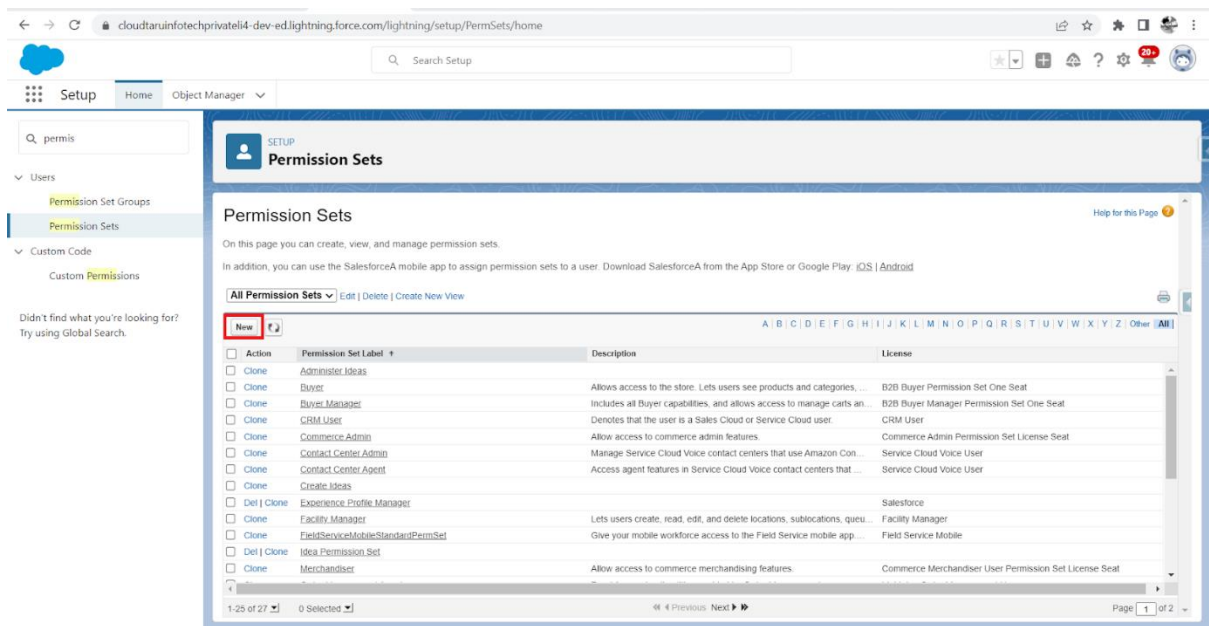


Permission Set Creation

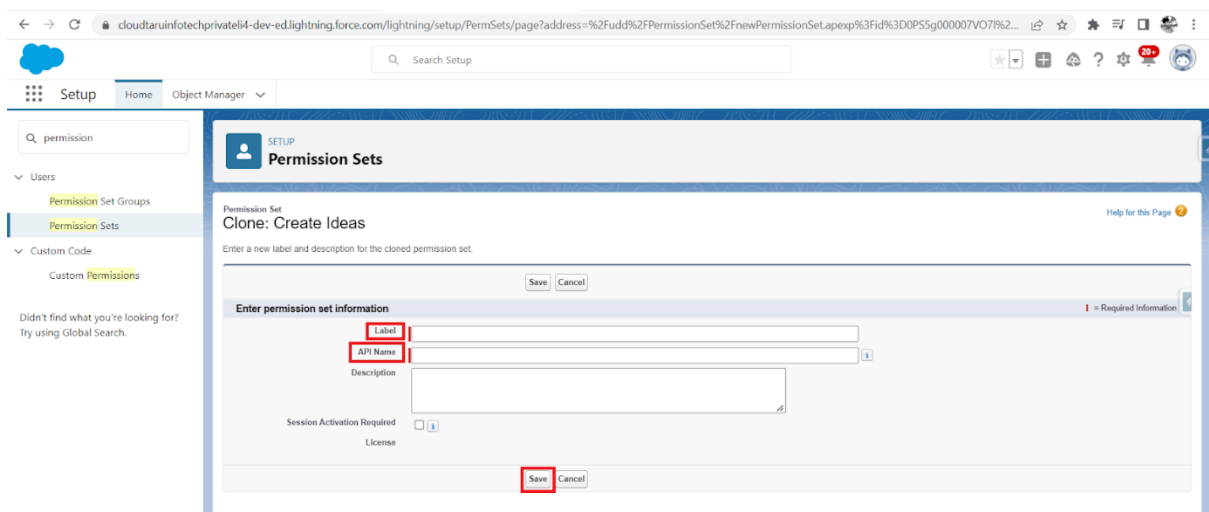
Step5: Configure Custom Permission Sets for Community Users and for Standard Salesforce Users

Step5a: Configure Permission Set for Community Users

- From Setup, search for “Permission Set” in the Quick find box and click on “Permission Set”. Click on **New**



- Give Label “Ideas Permission”, API Name and click on Save.



- Assign below Object permissions in the “Ideas Permission” Permission set:

Objects and Fields	Access
Ideas Object Permission	Read, Create and Edit
Attachment	Read and Edit
Categories	Read and Edit
Idea Body	Read and Edit
Status	Read and Edit
Title	Read and Edit

Step5b: Configure Permission Set for Standard Salesforce Users

- Clone ‘Ideas Permission’ Permission Set, provide Label as ‘Ideas Permission SF’
- Click on Save.
- Modify Tab Settings:

Setup → QuickFind → permissionset → **Ideas Permission SF**

- In the App section click on Object settings
- Click on “**IDEAS**”
- Click on Edit button.
- In the Tab settings Section Mark it **Available** and **Visible** checkbox

Permission Set
IdeaPermissionclone

Find Settings... | Clone | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings ▼ **IDEAS** ▼

IDEAS Save Cancel

Tab Settings

Available	Visible
☒	☒ ⓘ

- Assign Apps to salesforce users:

Setup → QuickFind → permission set → **Ideas Permission SF**

- In the App section click on Assigned Apps
- Click on Edit button add the **CNEURONS.IDEAS(CNEURONS_ideas)** app from available apps to Enable Apps.

[Permission Set Overview](#) > **Assigned Apps** ▼

Assigned Apps Save Close

Available Apps

- All Tabs (standard__AllTabSet)
- App Launcher (standard__AppLauncher)
- Bolt Solutions (standard__LightningBolt)
- Business Rules Engine (standard__ExpressionS
- Community (standard__Community)
- Consumer Goods (standard__Retail)
- Consumer Goods Visit Execution (standard__Re
- Content (standard__Content)
- Data Manager (standard__DataManager)
- Digital Experiences (standard__SalesforceCMS)
- Force.com (Force_com)
- Lightning Usage App (standard__LightningInstru

Add

Remove

Enabled Apps

- CNEURONS.IDEAS (CNEURONS__Ideas)

- Click on save button.

Guideline to Assign Permission Sets for Community User

Based on user criteria there are five types of permission sets. Based on the assigned permission set, the user will get the read, create, edit, and delete ideas. According to the user's requirement, permission sets can be assigned.

- If a user requires only read ideas permission, then assign the **IdeasPermission** and **Read Ideas**.
- If a user requires only read and create ideas permission then assign the **IdeasPermission**, **Read Ideas** and **Create Ideas**.
- If a user requires only read, create, and update ideas permission then assign the **IdeasPermission**, **Read Ideas**, **Create Ideas** and **Update Ideas**.

Guideline to Assign Permission Sets for Salesforce User

Based on user criteria there are five types of permission sets. Based on the assigned permission set, the user will get the read, create, edit, and delete ideas. According to the user's requirement, permission sets can be assigned.

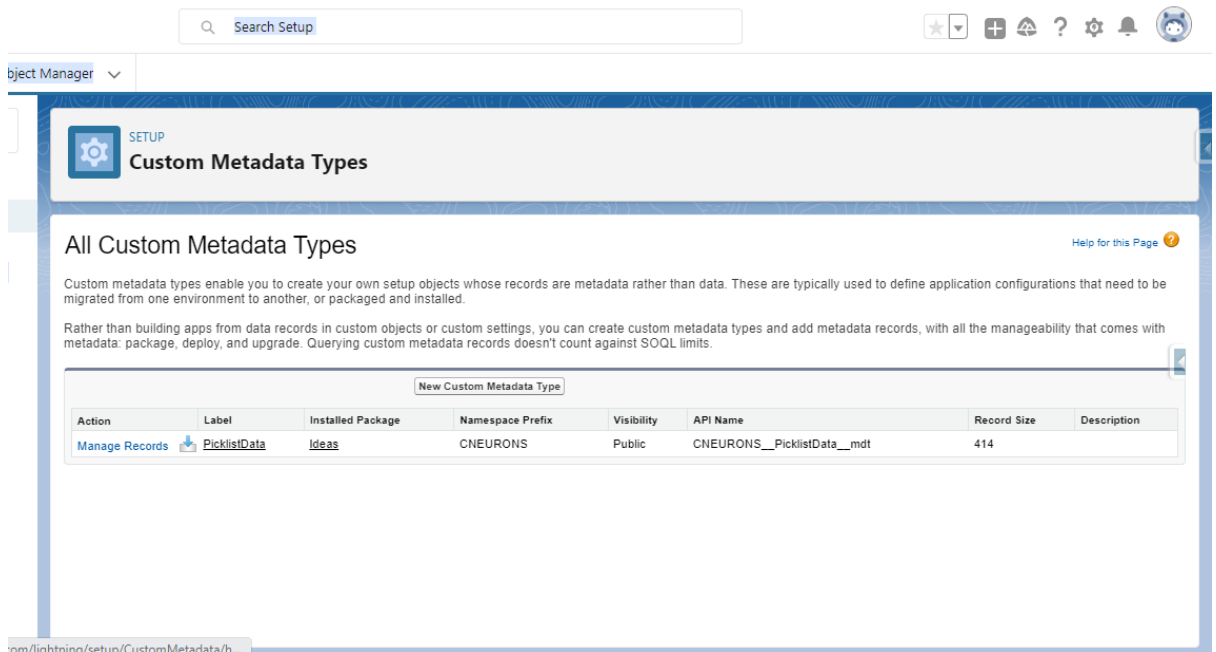
- If a user requires only read ideas permission, then assign the **Ideas Permission SF** and **Read Ideas**.
- If a user requires only read and create ideas permission then assign the **Ideas Permission SF**, **Read Ideas** and **Create Ideas**.
- If a user requires only read, create, and update ideas permission then assign the **Ideas Permission SF**, **Read Ideas**, **Create Ideas** and **Update Ideas**.
- If the user is an admin, then assign the **Ideas Permission SF**, **Read Ideas**, **Create Ideas**, **Update Ideas** and **Administer Ideas**.

Note: All salesforce users must have "Ideas Permission SF" Permission set and assign the below changes in "Ideas Permission SF"

Search Filters

Step6: Configure Search Filters for Ideas Component

- From Setup Page, Go to Custom metadata Types.
- Find the “PicklistData” and click on Manage Records



- Click on **New** button
- Create the records with given data.

Record 1

Label: categoryObjArray

PicklistData Name: categoryObjArray

Order: 2

PicklistData Value:

```
[{filterType:'Single',filterLabel:'Categories',filterName:'Categories',objectApiName:'Idea',optionsSource:'Picklist',filterOptions:[{label:'All',value:'select'}]}]
```

Record 2

Label:trendingObjArray

PicklistData Name:trendingObjArray

Order:1

PicklistData Value:

```
[{filterType:'Single',filterLabel:'Trending', filterName:'CNEURONS__Release__c', objectApiName:'Idea', optionsSource:'Picklist', filterOptions:[ {label: 'All Ideas',value: 'All Ideas'}, {label: 'Most Recent Ideas',value: 'Most Recent Ideas'}, {label: 'Most Popular Ideas',value: 'Most Popular Ideas'}, {label: 'Most Voted Ideas',value: 'Top Voted Ideas'}, {label: 'My Ideas',value: 'My Ideas'}, {label: 'My Subscriptions',value: 'My Subscriptions'} ]}]
```

Record 3:

Label:statusObjArray

PicklistData Name:statusObjArray

Order:1

PicklistData Value:

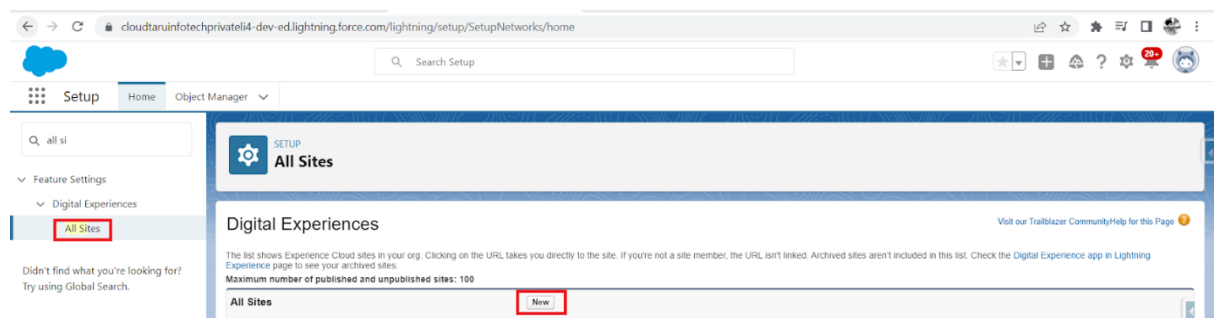
```
[{filterType:'Single',filterLabel:'Status',filterName:'Status',objectApiName:'Idea',optionsSource:'Picklist',filterOptions:[{label:'All',value:'select'}]}]
```

Community Setup

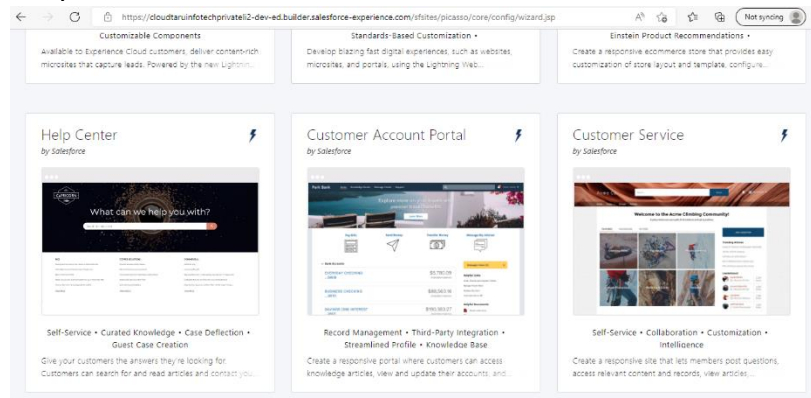
Step7 is required to be executed only if the target org doesn't have any existing Customer community Portal on which CN Ideas component can be exposed. In case target org has any existing Customer Community that can be used, Step7 can be skipped.

Step7: Setup Experience site for exposing CN Ideas component for Community Users

- Search All Sites in the quick find box and click on it. From there click **New** button to create a site.



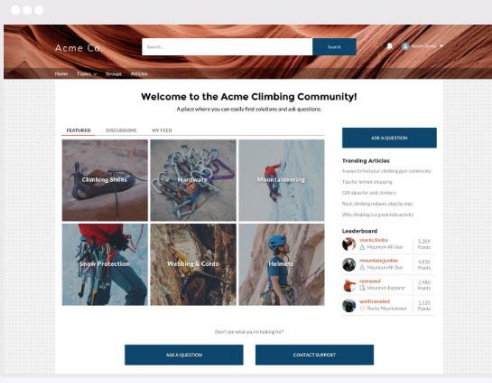
- To set up a new community portal select a template Example: **customer service** template.



- Give the name and the URL. Click on the Create button and it would take a few minutes to create the site.

← Back Help & Training





Enter a Name

Not sure what to enter? Don't worry—you can always change it later.

Name

URL

Create

- A new site is created with the given data. Click on builder to set up the page.

Workspaces

NewIdeaDev

?

Mounika Biradi

NewIdeaDev (Preview - Unpublished)

Add Metrics

See your favorite metrics right here by getting the latest AppExchange package.

Install AppExchange Package

My Workspaces



Builder

Build, brand, and customize your site's pages.



Moderation

Monitor posts and comments, create rules.



Content Management

Organize, manage, and build collections for your Experience Cloud site.



Gamification

Keep your members engaged with



Dashboards

Examine the health of your site with



Administration

Configure settings and properties for your

Quick Links

- [Experience Pulse Metrics](#)
- [Lightning Carousel and Banner Components](#)
- [Trailblazer Community: Experience Cloud - Best Practices Group](#)
- [Set Up and Manage Experience Cloud Sites](#)
- [AppExchange](#)

Expand Your Reach with Communities

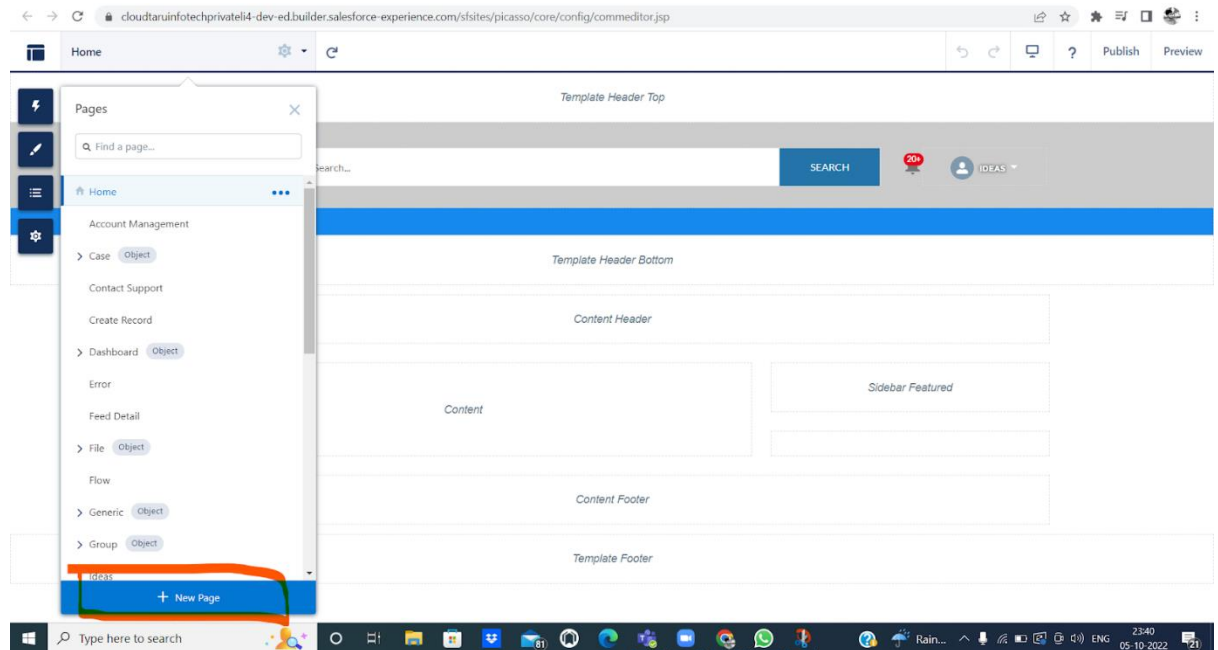


[START LEARNING](#)

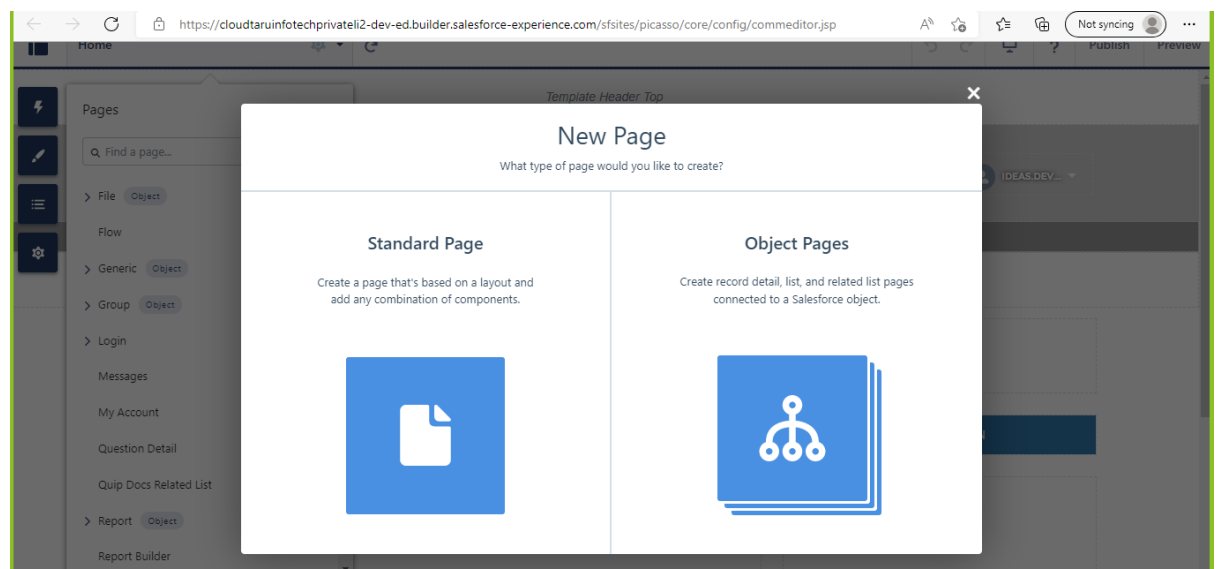
Step8 is required to be executed only if CN Ideas component is intended to be added on it's own page in the Customer Community Site. It can also be added to an existing page in the site, in such case step 8 can be skipped.

Step8: Configure a new Page in the Customer Community Site to expose the CN Ideas Component.

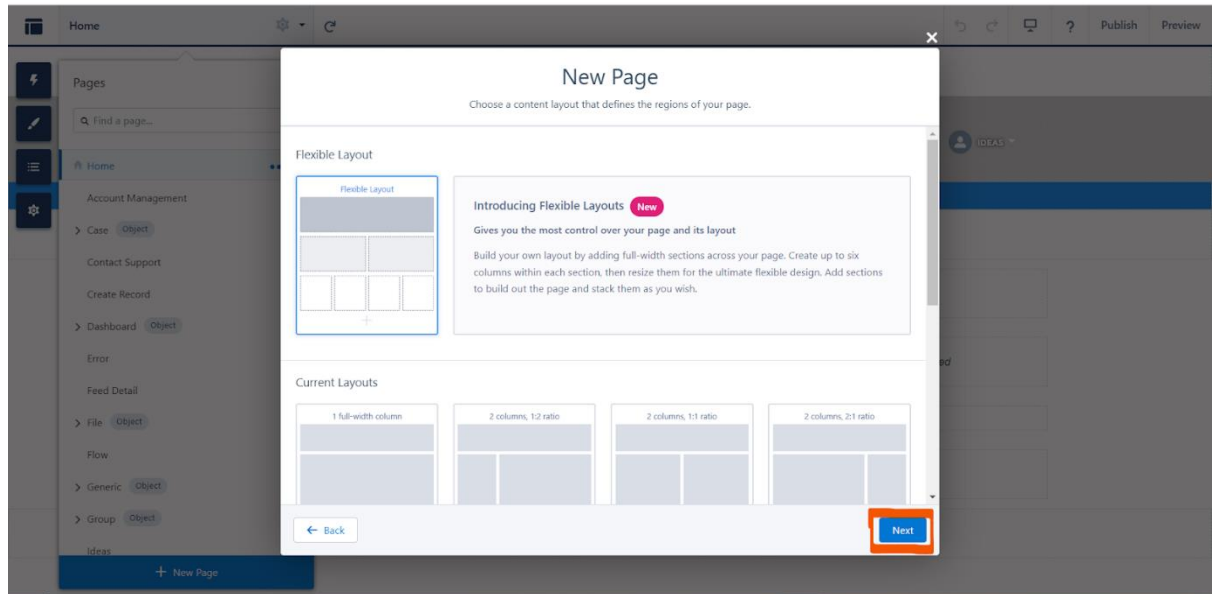
- Click on the **New Page** button.



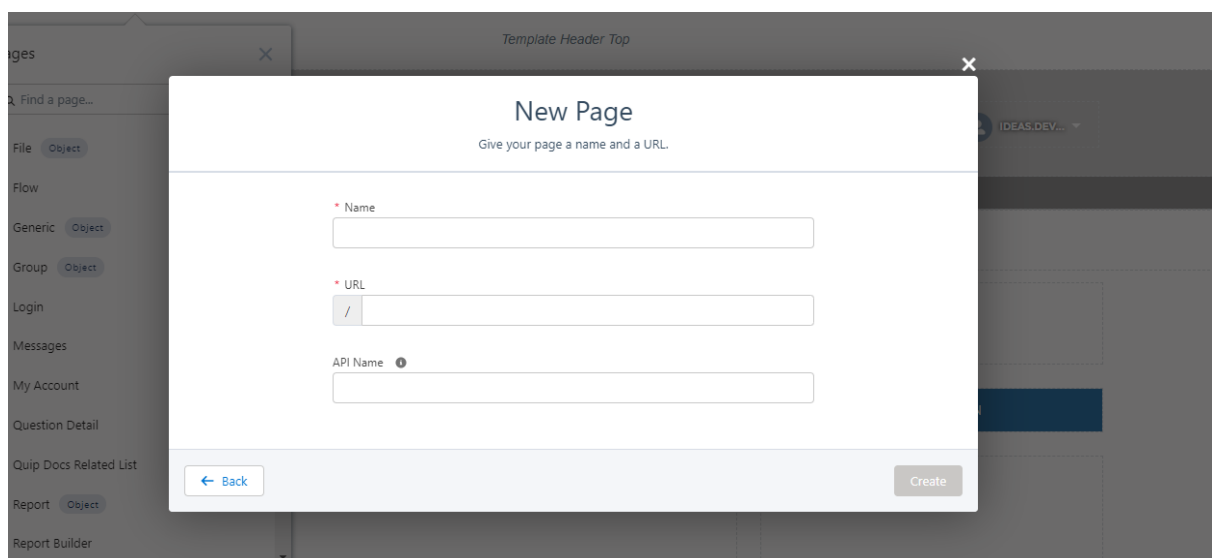
- Select Standard Page.



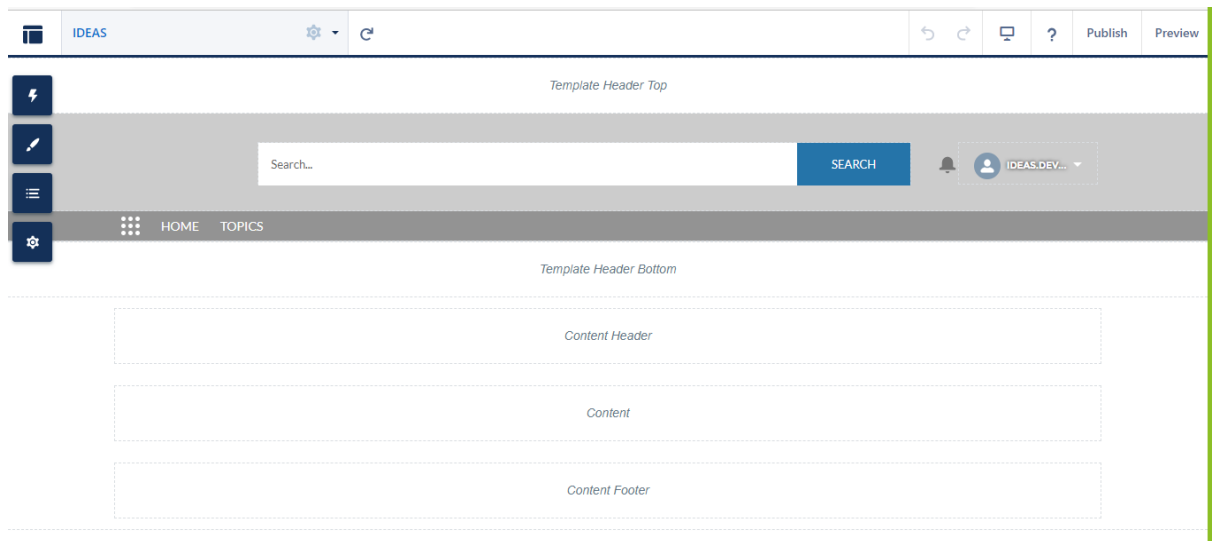
- Select 1 Full Width Column Layout and click on Next.



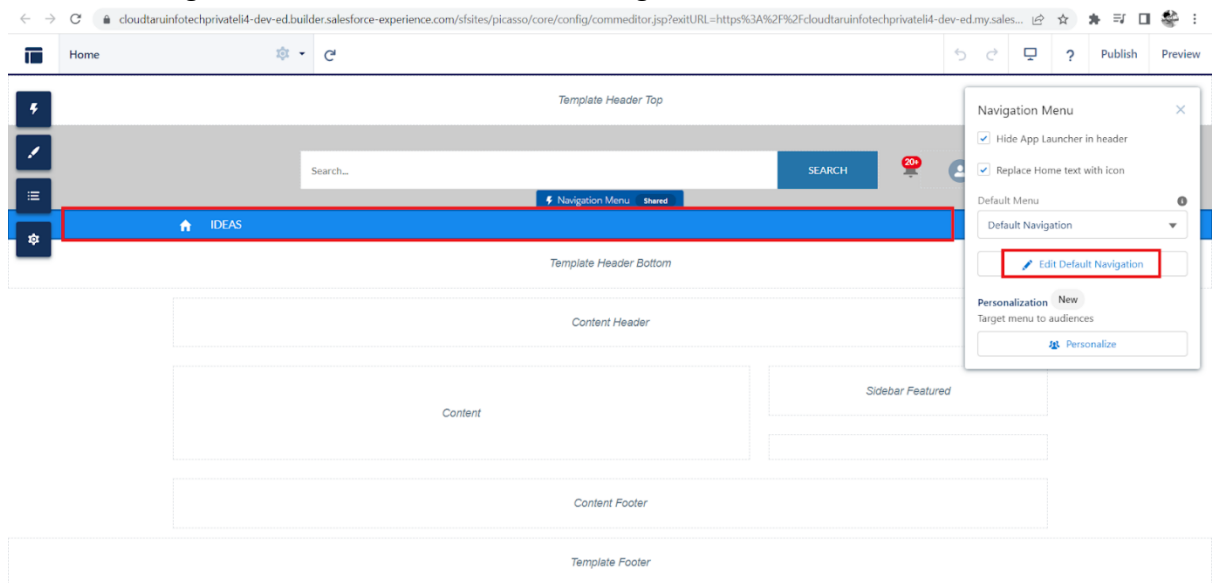
- Enter the Name, URL, and API name -- Create. Publish your changes.



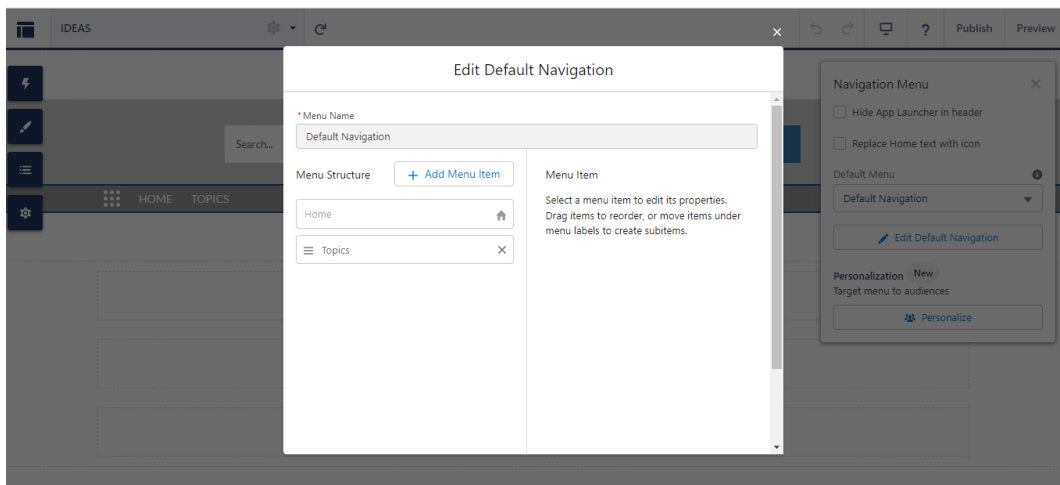
- Set up **IDEAS** page.



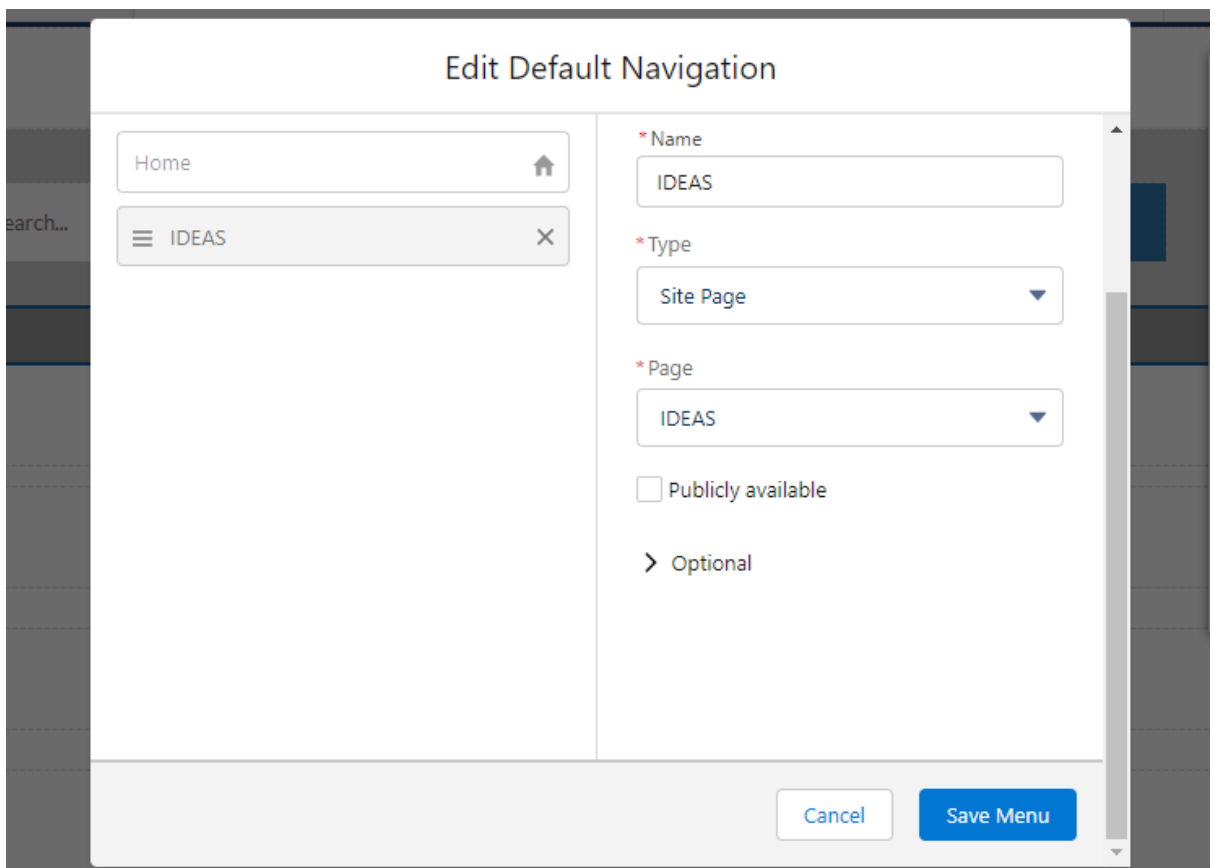
- Click on **Navigation Menu** → **Edit Default Navigation**



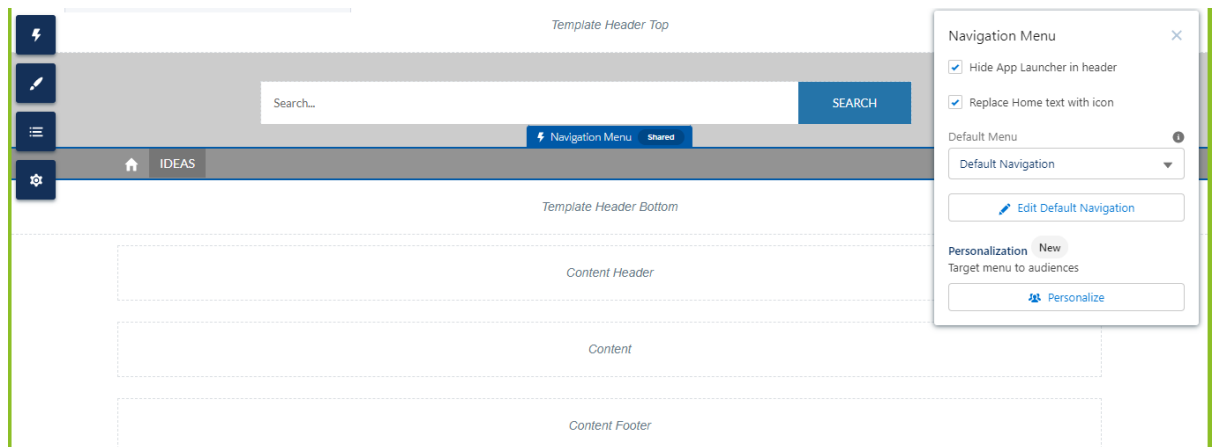
- Click on Edit Default Navigation----->Remove the Topics



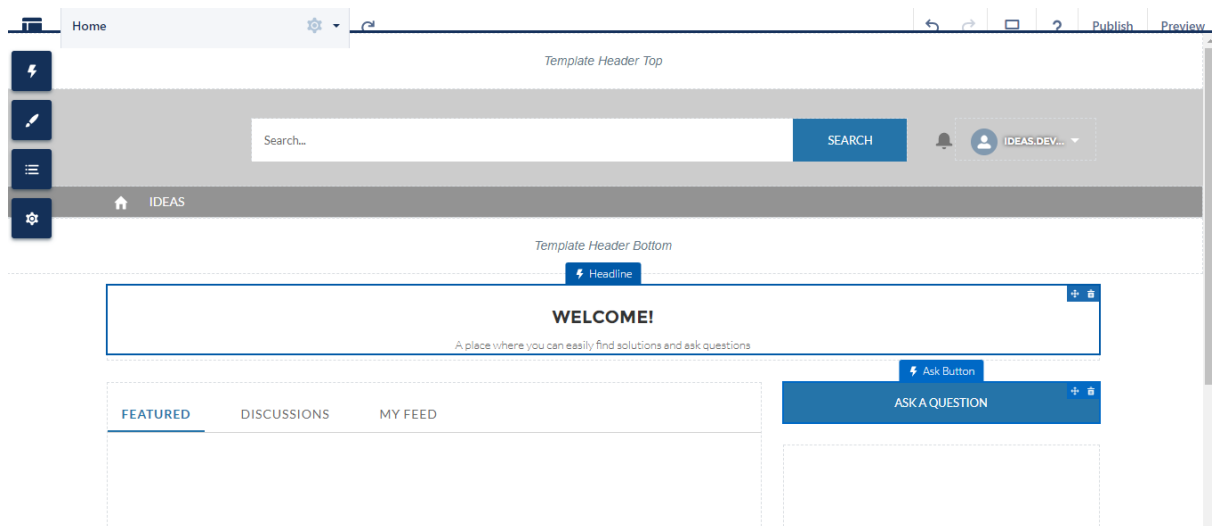
- Enter Name as IDEAS, select Type as Site Page and select Page as IDEAS. Click on Save Menu.



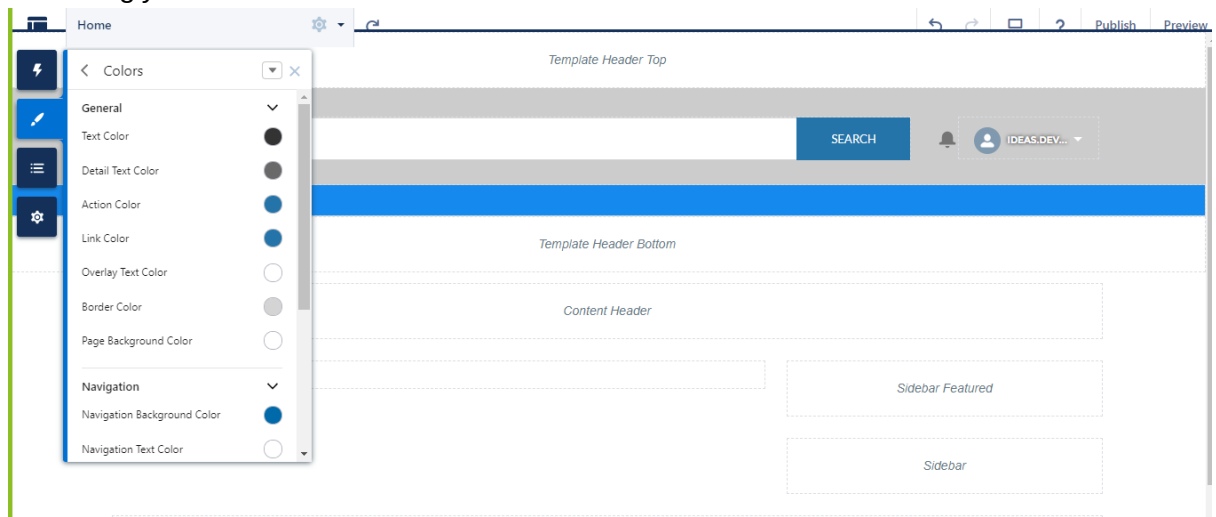
- Click on the navigation menu bar, check mark the “Hide App Launcher in header” and “Replace Home text with icon”.



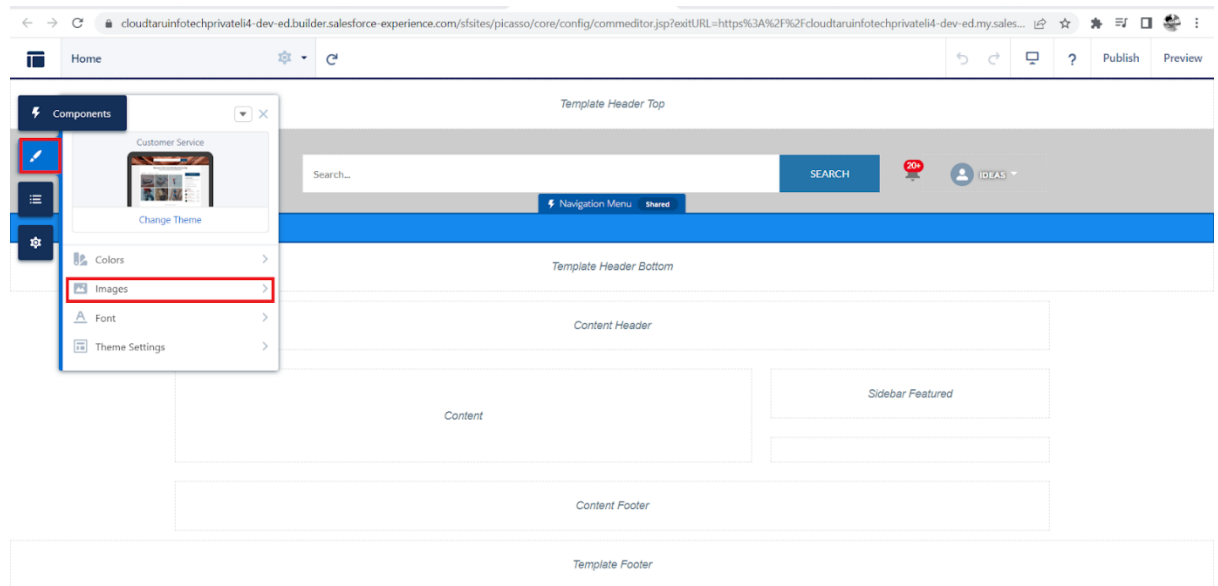
- Remove the headline and all content from the home page. You can customize accordingly.



- Set up the Colors including General, Navigation and Login Pages for the page accordingly from themes.

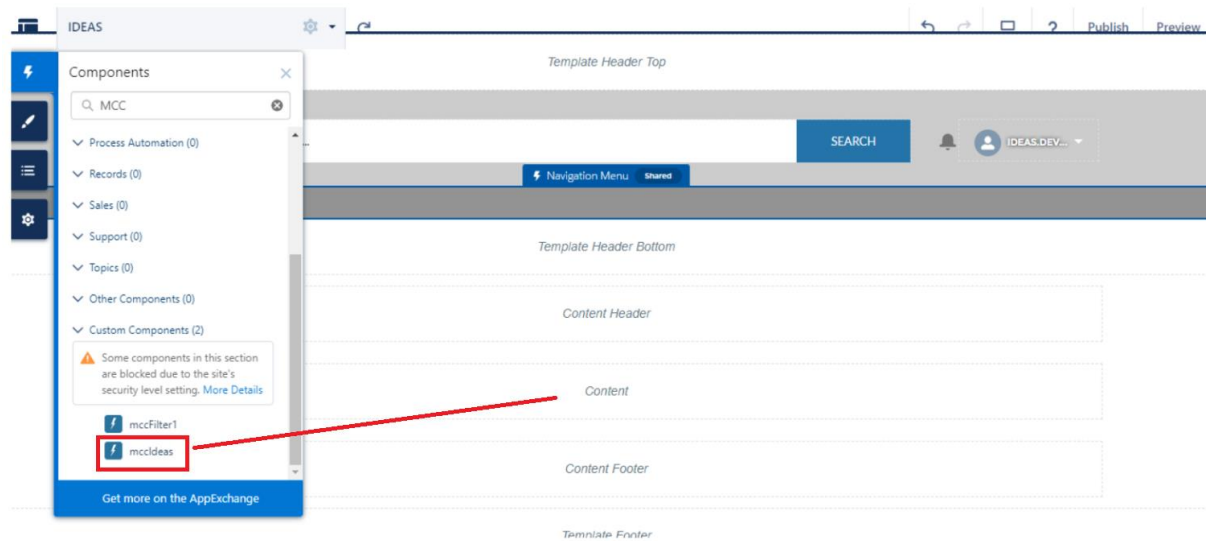


- From Themes, click on Images and upload your company logo under Company Logo.

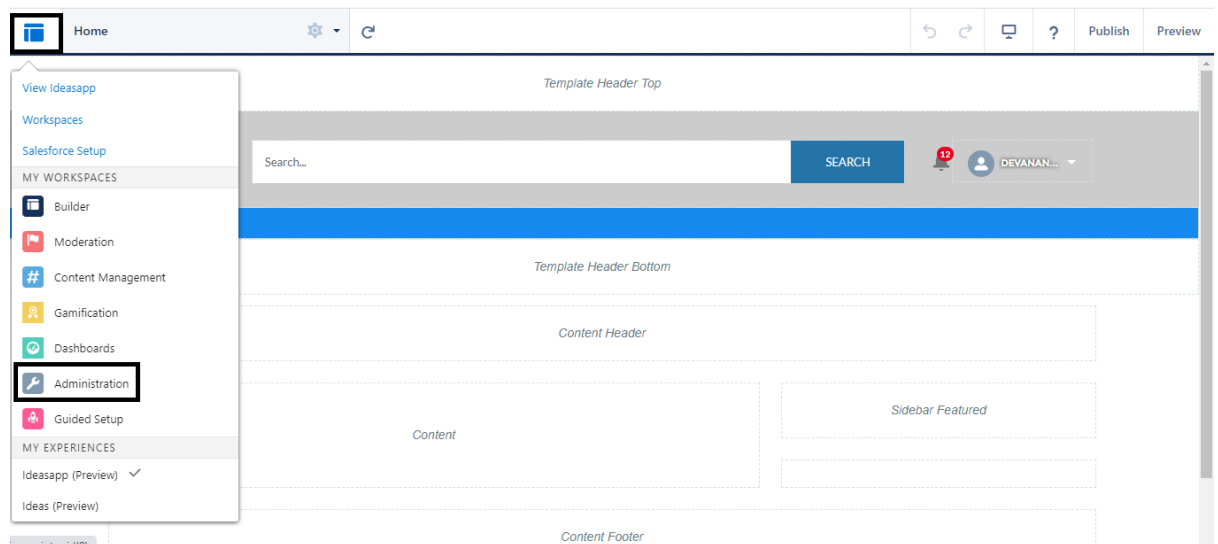


Step9: Add the CN Ideas Component to the existing/new Customer Community Site page.

- In the components search for **mccIdeas** under custom components, select it and drag it to the **Content**.



- From Builder, click on Administration.



Step10 is required to be executed only if you have executed [step7](#)

Step10: Activate new Customer Community Portal site.

- Click on the settings.
- Activate the status:

The screenshot shows the Salesforce Ideas app settings page. The left sidebar contains a navigation menu with the following items: Home, View Ideasapp, Workspaces, Salesforce Setup, MY WORKSPACES, Administration (Ideasapp), Settings, Preferences, Members, Contributors, Tabs, Branding, Login & Registration, Emails, and Pages. The 'Members' item is highlighted with a black box. The main content area is titled 'Settings' and contains a blue information box with the text: 'When a site is activated, new members receive a welcome email message. If you don't want new members to receive the email, deselect the Send welcome email checkbox in Emails.' Below this is a card for 'Ideasapp' with the URL 'https://cneuronsideasuat-dev-ed.develop.my.site.com/ideasapp'. The card has two rows of controls: the first row has 'Status' set to 'Preview' and an 'Activate' button; the second row has 'Template' set to 'Customer Service' and a 'Change Template' button.

Step11: Configure site member access

- Click on Members

The screenshot shows the Salesforce NewideaLwcTho settings page. The left sidebar contains a navigation menu with the following items: Administration (NewideaLwcTho), Settings, Preferences, Members, Contributors, Tabs, Branding, Login & Registration, Emails, Pages, Reputation Levels, Reputation Points, Rich Publisher Apps, and URL Redirects. The 'Members' item is highlighted with a yellow box. The main content area is titled 'Settings' and contains a card for 'NewideaLwcTho' with the URL 'https://lwcthoughtsqa-dev-ed.my.site.com/ideaslwcthoughts'. The card has two rows of controls: the first row has 'Status' set to 'Active' and a 'Deactivate' button; the second row has 'Template' set to 'Customer Service' and a 'Change Template' button.

- Under Select profiles, select All from the search filter and Add the required profiles and Permission sets (**Profiles**: system administrator, **Custom Profile Created earlier in Step2** (cloned **Customer Community User** profile) and Add **Permission sets**: Administer ideas, create Ideas, Read Ideas, Update ideas and Ideas Permission set)

Administration
CN IDEAS

Settings
Preferences
Members
Contributors
Login & Registration
Emails
Pages
Rich Publisher Apps
URL Redirects

When you add a profile or permission set, new site members receive a welcome email message. If you want to prevent those site members from receiving welcome email messages, deselect the Send welcome email option.

Select Profiles

Search: All for Find

Available Profiles

- All
- Customer
- Internal
- Partner
- Analytics/Cloud Security User
- Authenticated Website
- Chatter Free User
- Chatter Moderator User
- Chatter Only User
- Company Communities User
- Contract Manager
- Cross Org Data Proxy User
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User

Selected Profiles

- Ideas Customer Community
- System Administrator

Select Permission Sets

Find

Available Permission Sets

- None

Selected Permission Sets

- Administer Ideas
- Create Ideas
- Read Ideas
- Update Ideas
- IdeasPermissions

- Click on save button.

cloudtaruinfotechprivatel4-dev-ed.builder.salesforce-experience.com/sfsites/picasso/core/config/commeditor.jsp?exitURL=https%3A%2F%2Fcloudtaruinfotechprivatel4-dev-ed.my.sales...

Ideas

Template Header Top

Search... SEARCH

20

IDEAS

Template Header Bottom

Publish

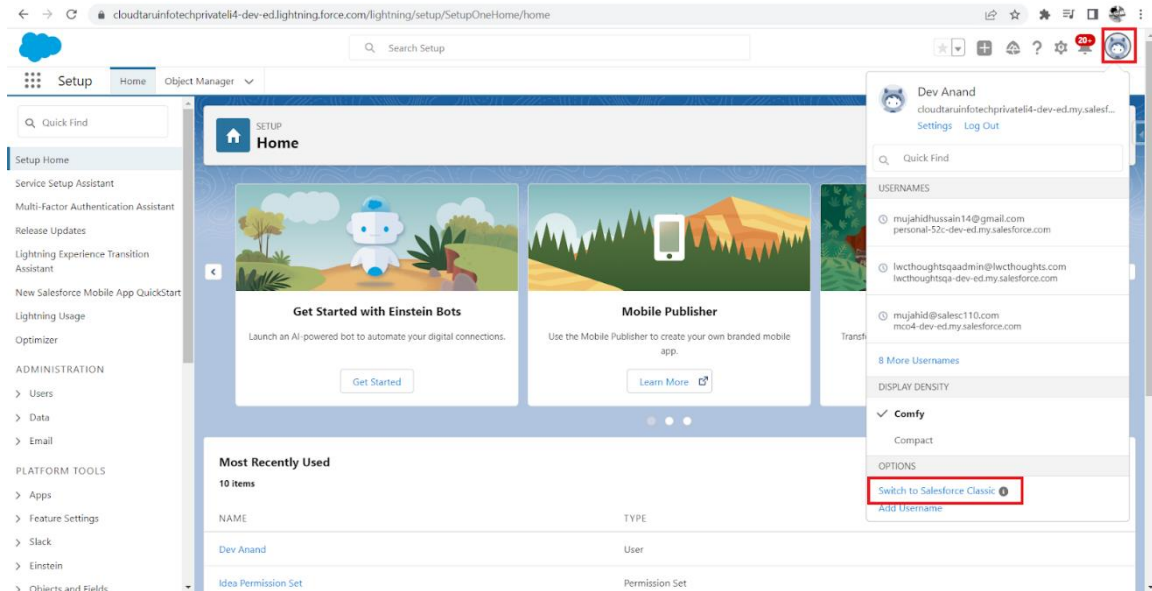
Preview

- Publish the community.

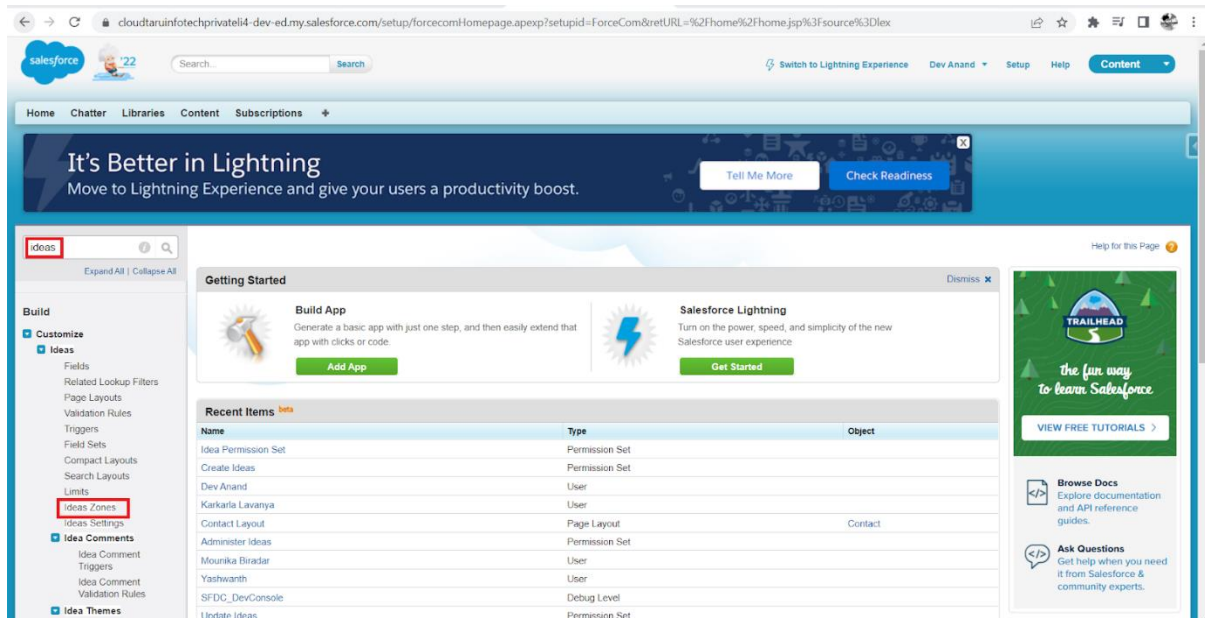
Idea Zone and Field values Setup

Step12: Configure Picklist values and zonal configuration for Ideas

- From Setup page, Go to Profile and click on “Switch to Salesforce Classic”.



- From Setup, in quick find search ideas and click on Idea Zones



- Check the Idea Zone record with name of **Internal Community**. If it is available open the internal community. Otherwise edit the zone name with Internal community.

Zones

[Help for this f](#)

This page allows you to create and edit zones for Ideas, Answers, and Chatter Answers. Each zone has its own unique Ideas, questions and replies.

View: All [Create New View](#)

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z O		
Action	Name	Active
Edit	Internal Community	✓
		Created Date
		9/20/2022, 4:01 AM

- In Zone Edit check the visibility section. Edit the Show in value as Experience and in Experience field, select your community portal under which [Step9](#) is executed. Save the changes.

Zone Edit
Internal Community

Customize the settings for your zone.

Zone Edit Save Cancel

Name: Internal Community

Description:

Active: ☒

Username Format: First Name + Last Name

Visibility: Show in: Experience Experience: Ideasapp

Ideas Settings Required Information

Experts Group: --None--

Save Cancel

- In Quick find search **ideas** and select 'Fields' under Ideas

cloudtaruinfotechprivatel4-dev-ed.my.salesforce.com/setup/forcecom/homepage.apexp?setupid=ForceCom&retURL=%2Fhome%2Fhome.jsp%3Fsource%3Dlex

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ideas

Build

- Customize
 - Ideas
 - Fields
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Name	Type	Object
Idea Permission Set	Permission Set	

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- Under Ideas standard field section, Click on categories field.

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 picklist values.

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

- Under the Categories picklist values, Click on New to add values. You can add/remove category values as per your Org's requirements. Values shown here are sample values.

Idea Field Categories

Back to Idea Fields

[Set Field-Level Security](#)

Field Information

Field Label	Field Name
Categories	Categories
Data Type	Picklist (Multi-Select)
Description	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	

Picklist Values Used

Active picklist values	Inactive picklist values
6 (500 max)	1 (4,000 max)

Validation Rules [New](#) [Validation Rules Help](#)

No validation rules defined.

Categories Picklist Values [New](#) [Reorder](#) [Replace](#) [Printable View](#) [Categories Picklist Values Help](#)

Action	Values	API Name	Default	Modified By
Edit Del Deactivate	Others	Others	☐	Dev Anand, 9/29/2022, 12:34 AM
Edit Del Deactivate	Help Desk	Help Desk	☐	Dev Anand, 9/29/2022, 12:34 AM
Edit Del Deactivate	PSA	PSA	☐	Dev Anand, 9/29/2022, 12:34 AM
Edit Del Deactivate	HR	HR	☐	Dev Anand, 9/29/2022, 12:34 AM
Edit Del Deactivate	Testing Categories	Testing Categories	☐	Dev Anand, 9/29/2022, 12:34 AM
Edit Del Deactivate	PLV Editor	PLV Editor	☐	Dev Anand, 9/29/2022, 12:34 AM

- In Ideas Fields, Under Ideas standard field section, Click on **Status** field.

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 picklist values.

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

- Click on New and Add the status picklist values for Status field as per your Org's requirements. Select one of these values as default value for Status field. Values and default value shown here are sample values.

The screenshot shows the Salesforce Setup page for the 'Status' picklist. The page title is 'Picklist Edit Status'. Below the title, it says 'Below is the master list of picklist values for the Status field. Click Edit to change the name of the value or make it the default value. Click New to add a value to the picklist. Click Reorder to change the sequence of values in the list.'

The 'Status Picklist Values' table is displayed with the following columns: Action, Values, API Name, Default, Chart Colors, and Modified By. The table contains 10 rows of values, including 'New', 'Being considered', 'in Development', 'Delivered', 'WIP', 'Converted to Story', 'Rejected', 'Approved', 'On Hold(Being Implemented)', and 'Delivered'.

Below the table, there is an 'Inactive Values' section with the text 'No Inactive Values values defined.'

- In Idea Fields, under the **idea Custom Fields & Relationships**, open the **Release field label**.

The screenshot shows the Salesforce Setup page for 'Idea Fields'. The page title is 'Idea Fields'. Below the title, it says '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 picklist values.'

The 'Idea Standard Fields' table is displayed with the following columns: Action, Field Label, Field Name, Data Type, Controlling Field, and Indexed. The table contains 5 rows of standard fields, including 'Attachment', 'Categories', 'Body', 'Status', and 'Title'.

Below the table, there is an 'Idea Custom Fields & Relationships' section with a 'New' button. The table is displayed with the following columns: Action, Field Label, API Name, Installed Package, Data Type, Indexed, and Modified By. The table contains 15 rows of custom fields, including 'Can Edit', 'Count', 'Has Attachment', 'Idea Votes', 'Is Admin', 'Is Admin Or Owner', 'Is Demote', 'Is Disliked', 'Is Liked', 'Is Promote', 'Is Subscribed', 'JIRA Key', 'Official Response', 'Prioritization', 'Release', and 'Soft Delete'. The 'Release' field is highlighted with a red box.

- You can add/remove Release Values. These is a Global Picklist field. Admin can be able to add/remove values whenever its needed. The field values added here will be seen under “Trending” Category. Add Release field picklist values as per your Org’s requirements. Values shown here are sample values.

Values						
Action	Values	API Name	Default	Chart Colors	Modified By	
Edit Del Deactivate	Fall 21 Release Candidates	Fall 21	☐	Assigned dynamically	Cloud.Taru, 9/28/2022, 5:57 AM	
Edit Del Deactivate	Spring 22 Release Candidates	Spring 22	☐	Assigned dynamically	Cloud.Taru, 9/28/2022, 5:57 AM	
Edit Del Deactivate	Fall 22 Release Candidates	Fall 22	☐	Assigned dynamically	Cloud.Taru, 9/28/2022, 5:57 AM	
Edit Del Deactivate	Spring 23 Release Candidates	Spring 23	☐	Assigned dynamically	Cloud.Taru, 9/28/2022, 5:57 AM	

- Click on Ideas zones from Quick Find
- Open Internal community
- In ideas, edit the Categories, Release and Status values.

Quick Find / Search...

Expand All | Collapse All

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Manage Territories

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Privacy Center

Security Controls

Domain Management

Communication Templates

Zone

Internal Community

Back to List: Ideas Zones

Zone Detail

Name

Internal Community

Edit

Description

Active

✓

Username Format

First Name + Last Name

Created By

Devanand M.

9/20/2022, 4:01 AM

Modified By

Devanand M.

9/22/2022, 11:15 PM

Visibility

Show in

Experience

Experience

Ideasapp

Ideas Settings

Experts Group

Edit

Idea Picklists Available for Editing

Idea Picklists Available for Editing Help

Action	Field	Modified Date
Edit	Categories	9/23/2022, 3:20 AM
Edit	Release	9/22/2022, 11:04 PM
Edit	Status	9/20/2022, 6:28 AM

- Click on “Switch to Lightning Experience”

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22

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Dev Anand

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Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

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 picklist values.

Idea Standard Fields

Idea Standard Fields Help

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

Idea Custom Fields & Relationships

New

Idea Custom Fields & Relationships Help

Action	Field Label	API Name	Installed Package	Data Type	Indexed	Modified By
Edit	Can Edit	CNEURONS__Can_Edit__c	Ideas	Formula (Checkbox)		Dev Anand, 9/28/2022, 5:57 AM
Edit	Count	CNEURONS__Count__c	Ideas	Formula (Number)		Dev Anand, 9/28/2022, 5:57 AM
Edit	Has Attachment	CNEURONS__Has_Attachment__c	Ideas	Checkbox		Dev Anand, 9/28/2022, 5:57 AM
Edit	Idea Votes	CNEURONS__Idea_Votes__c	Ideas	Number(18, 0)		Dev Anand, 9/28/2022, 5:57 AM
Edit	Is Admin	CNEURONS__Is_Admin__c	Ideas	Formula (Checkbox)		Dev Anand, 9/28/2022, 5:57 AM
Edit	Is Admin Or Owner	CNEURONS__Is_AdminOrOwner__c	Ideas	Formula (Checkbox)		Dev Anand, 9/28/2022, 5:57 AM
Edit	Is Demote	CNEURONS__Is_Demote__c	Ideas	Checkbox		Dev Anand, 9/28/2022, 5:57 AM
Edit	Is Disliked	CNEURONS__Is_Disliked__c	Ideas	Checkbox		Dev Anand, 9/28/2022, 5:57 AM
Edit	Is Liked	CNEURONS__Is_Liked__c	Ideas	Checkbox		Dev Anand, 9/28/2022, 5:57 AM
Edit	Is Promote	CNEURONS__Is_Promote__c	Ideas	Checkbox		Dev Anand, 9/28/2022, 5:57 AM
Edit	Is Subscribed	CNEURONS__Is_Subscribed__c	Ideas	Checkbox		Dev Anand, 9/28/2022, 5:57 AM

- From Setup, Search for “Sharing” In quick find box, click on Sharing settings and Click on Edit.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under the 'Security' section, 'Sharing Settings' is highlighted with a red box. The main content area is titled 'Sharing Settings'. Below the introductory text, there is a 'Manage sharing settings for:' dropdown set to 'All Objects'. Under the 'Default Sharing Settings' section, the 'Organization-Wide Defaults' table is visible. The 'Edit' button for this table is highlighted with a red box.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	☒
Account and Contract	Public Read/Write	Private	☒
Contact	Controlled by Parent	Controlled by Parent	☒
Order	Controlled by Parent	Controlled by Parent	☒
Asset	Controlled by Parent	Controlled by Parent	☒
Opportunity	Public Read/Write	Private	☒
Case	Public Read/Write/Transfer	Private	☒
Campaign	Public Full Access	Private	☒
Campaign Member	Controlled by Campaign	Controlled by Campaign	☒
User	Public Read Only	Public Read Only	☒
Activity	Private	Private	☒

- Change ‘User’ object data external visibility to ‘Public Read only’ from Private.
- Click on Save.

The screenshot shows the 'Organization-Wide Sharing Defaults Edit' page. At the top, there are 'Save' and 'Cancel' buttons. Below is a table with columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The 'User' object row is highlighted with a red box, and the 'Public Read Only' dropdown in the 'Default External Access' column for this row is also highlighted with a red box.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	☒
Account and Contract	Public Read/Write	Private	☒
Order	Controlled by Parent	Controlled by Parent	☒
Contact	Controlled by Parent	Controlled by Parent	☒
Asset	Controlled by Parent	Controlled by Parent	☒
Opportunity	Public Read/Write	Private	☒
Case	Public Read/Write/Transfer	Private	☒
Campaign	Public Full Access	Private	☒
Campaign Member	Controlled by Campaign	Controlled by Campaign	☒
User	Public Read Only	Public Read Only	☒
Individual	Public Read/Write	Private	☒
Voice Call	Private	Private	☒
Activity	Private	Private	☒
Calendar	Hide Details and Add Events	Hide Details and Add Events	☒
Price Book	Use	Use	☒
Product	Public Read/Write	Public Read/Write	☒

Technical Documentation:

Components details:

<i>Name</i>	<i>Parent Object</i>	<i>Type</i>	<i>API Name</i>
IdeasWrapperClass		Apex Class	IdeasWrapperClass
MccFilterCtrl		Apex Class	MccFilterCtrl
MccFilterCtrlTest		Apex Class	MccFilterCtrlTest
NN_Alerts_on_Idea_updation		Apex Class	NN_Alerts_on_Idea_updation
NN_Idea_Deletion		Apex Class	NN_Idea_Deletion
NN_Idea_Deletion_Test		Apex Class	NN_Idea_Deletion_Test
Nn_New_Idea_Form_Controller		Apex Class	Nn_New_Idea_Form_Controller
NN_New_Idea_Form_Controller_Test		Apex Class	NN_New_Idea_Form_Controller_Test
NN_Votes_Count		Apex Class	NN_Votes_Count
NN_Votes_Count_Test_Class		Apex Class	NN_Votes_Count_Test_Class
NN_Alerts_On_Idea_Updation_Test		Apex Class	NN_Alerts_On_Idea_Updation_Test
Nn_ideas_controller_helper		Apex Class	Nn_ideas_controller_helper
NN_Ideas_Controller_Test_class		Apex class	NN_Ideas_Controller_Test_class
Nn_ideas_controller		Apex class	Nn_ideas_controller
Idea_Update_Email_Alert_Test		Apex class	Idea_Update_Email_Alert_Test
Nn_RecordTypeUtilWithCache		Apex class	Nn_RecordTypeUtilWithCache
Nn_Constants		Apex class	Nn_Constants
Idea_Update_Email_Alert		Apex class	Idea_Update_Email_Alert
ContactsDisplay		Apex Class	contactsDisplay
TriggerUtility		Apex Trigger	TriggerUtility
nn_Like_Trigger		Apex Trigger	nn_Like_Trigger
Active	Idea Setting	Custom Field	Subscription__c.Active__c

Can Edit	Idea	Custom Field	Idea.Can_Edit__c
Filter Label	Idea Setting	Custom Field	Subscription__c.Filter_Label__c
Filter Value	Idea Setting	Custom Field	Subscription__c.Filter_Value__c
Has Attachment	Idea	Custom Field	Idea.Has_Attachment__c
IDEA Owner Email	Idea Setting	Custom Field	Subscription__c.IDEA_Owner_Email__c
IS Disliked	Idea	Custom Field	Idea.IS_Disliked__c
Idea	Like or Unlike	Custom Field	Like_or_Unlike__c.Idea__c
Idea	Idea Setting	Custom Field	Subscription__c.Idea__c
Idea Votes	Idea	Custom Field	Idea.Idea_Votes__c
Ideas Points	Idea Setting	Custom Field	Subscription__c.Ideas_Points__c
Is Admin	Idea	Custom Field	Idea.Is_Admin__c
Is Liked	Idea	Custom Field	Idea.Is_Liked__c
Is Subscribed	Idea	Custom Field	Idea.Is_Subscribed__c
IsDemote	Idea	Custom Field	Idea.IsDemote__c
IsPromote	Idea	Custom Field	Idea.IsPromote__c
JIRA key	Idea	Custom Field	Idea.JIRA_key__c
Official Response	Idea	Custom Field	Idea.Official_Response__c
Order	Idea Setting	Custom Field	Subscription__c.Order__c
PostedBy	Like or Unlike	Custom Field	Like_or_Unlike__c.PostedBy__c
PostedBy	Idea Setting	Custom Field	Subscription__c.PostedBy__c
Prioritization	Idea	Custom Field	Idea.Prioritization__c
Reference Name	Idea Setting	Custom Field	Subscription__c.Referance_Name__c
Release	Idea	Custom Field	Idea.Release__c
Soft Delete	Idea	Custom Field	Idea.Soft_Delete__c
Total Dislike	Idea	Custom Field	Idea.Total_Dislike__c
Total Likes	Idea	Custom Field	Idea.Total_Likes__c
Unique id	Idea	Custom Field	Idea.Unique_id__c

IsAdminOrOwner	Idea	Custom Field	Idea.isAdminOrOwner__c
url	Idea	Custom Field	Idea.url__c
NN_Categories		Custom Label	NN_Categories
NN_DeleteConfirmationMessage		Custom Label	NN_DeleteConfirmationMessage
NN_Duplicate_Idea		Custom Label	NN_Duplicate_Idea
NN_Idea_Notifypagepath_name		Custom Label	NN_Idea_Notifypagepath_name
NN_JIRA_Key		Custom Label	NN_JIRA_Key
NN_Official_response		Custom Label	NN_Official_response
NN_Prioritization		Custom Label	NN_Prioritization
NN_Release_mandatory_message		Custom Label	NN_Release_mandatory_message
NN_Status		Custom Label	NN_Status
Sample		Custom Notification Type	Sample
Idea Setting		Custom Object	Subscription__c
Like or Unlike		Custom Object	Like_or_Unlike__c
Administer Ideas Custom Permission Set		Custom Permission	Administer_Ideas_Custom_Permission_Set
Create Ideas Custom Permission Set		Custom Permission	Create_Ideas_Custom_Permission_Set
Read Ideas Custom Permission Set		Custom Permission	Read_Ideas_Custom_Permission_Set
Update IdeasCustom Permission Set		Custom Permission	Update_Ideas_Custom_Permission_Set
Read Ideas Custom Permission Set		Custom Permission	Read_Ideas_Custom_Permission_Set
Idea Duplicate check		Flow Version	Idea_Duplicate_check
Idea_Release		Global Value Set	Idea_Release

mccFilter1		Lightning Web Component Bundle	mccFilter1
mcclIdeaDetail		Lightning Web Component Bundle	mcclIdeaDetail
MccIdeas		Lightning Web Component Bundle	mcclIdeas
Mnnewideasform		Lightning Web Component Bundle	Mnnewideasform
MutliSelectPicklist		Lightning Web Component Bundle	mutliSelectPicklist
PicklistValue		Lightning Web Component Bundle	picklistValue
All	Like or Unlike	List View	Like_or_Unlike__c.All
All	Idea Setting	List View	Subscription__c.All
Filters	Idea Setting	List View	Subscription__c.Filters
Ideas Settings	Idea Setting	List View	Subscription__c.Ideas_Settings
Idea Settings Layout	Idea Setting	Page Layout	Subscription__c-Idea Settings Layout
Like or Dislike Layout	Like or Unlike	Page Layout	Like_or_Unlike__c-Like or Dislike Layout
Subscription Layout	Idea Setting	Page Layout	Subscription__c-Subscription Layout
Administer Ideas		Permission Set	Administer_Ideas
Create Ideas		Permission Set	Create_Ideas

Update Ideas		Permission Set	Update_Ideas
Read Ideas		Permission Set	Read_Ideas
DownVote	Like or Unlike	Record Type	Like_or_Unlike__c.DownVote
Idea Settings	Idea Setting	Record Type	Subscription__c.Idea_Settings
Subscription	Idea Setting	Record Type	Subscription__c.Subscription
UpVote	Like or Unlike	Record Type	Like_or_Unlike__c.Up_Vote
Like	Like or Unlike	Record Type	Like_or_Unlike__c.like
Unlike	Like or Unlike	Record Type	Like_or_Unlike__c.unlike
NN_Bulb		Static Resource	NN_Bulb
NN_Ideas_Loading		Static Resource	NN_Ideas_Loading
NN_Ideas_No_Data		Static Resource	NN_Ideas_No_Data
NN_ideas_no_comments		Static Resource	NN_ideas_no_comments
Idea Setting		Tab	Subscription__c
Internal Community		Zone	Internal Community
PicklistData		Custom metadata types	PicklistData