

Custom Topics and Tags Guide

Permissions

Permission Set Name	Object Permissions	Custom Metadata Permissions
Topic Admin	Topic__c (Read, Create, Edit, Delete, View All, Modify All)	Topic_Configuration_mdt (Read, Create, Edit, Delete)
Topic User	Topic__c (Read, View All) Topic_Junction__c (Read, Create, Edit, Delete)	

Customization Guide

1. Go to **Object Manager** > **Topic** and add a desired category to the Category picklist field.
2. Create **Topic Configuration** Metadata Records with the following required and optional fields. This will determine which Topic Categories will be available to use on each object.

Required:

- Label
- Topic Configuration Name
- Category
- Object Visibility
- Icon Name

Optional:

- Object Field
- Pill Color
- Pill Style

Note: If you would like to map Topics to a specific field on an Object, create a new multi-select picklist field on respective Object, and then reference the field in Object Field in the metadata record. In this example, we have created a metadata record to display Utilities Topics on the custom Utilities field on Account object.

Important: Make sure to uncheck *Restrict picklist to the values defined in the value set* when creating the multi-select picklist.

View: All Edit Create New View								
New								
Action	Label ↑	Topic Configuration Name	Category	Object Visibility	Object Field	Icon Name	Pill Color	Pill Style
Edit Del	Games Account	Games_Account	Games	Account		utility:puzzle	Light Orange	Outline
Edit Del	Global Account	Global_Account	Global	Account		utility:world	Light Yellow	Outline
Edit Del	Products Account	Products_Account	Products	Account		utility:product	Light Green	Outline
Edit Del	Services Account	Services_Account	Services	Account		utility:fulfillment_order	Light Blue	Outline
Edit Del	Utilities Account	Utilities_Account	Utilities	Account	Utilities__c	utility:custom_apps	Light Purple	Outline

Figure 2: Sample Topic Configuration Metadata records. In this example, these Topics will be available to use on Account record.

3. Drag-and-drop **topicCardComponent** onto lightning Record Detail Page and fill out the required fields:

- Card Title
- Card Icon
- Card Help Text
- Object API Name
- Topic Categories – a comma-separated list of Categories that will be visible to users on this lightning page

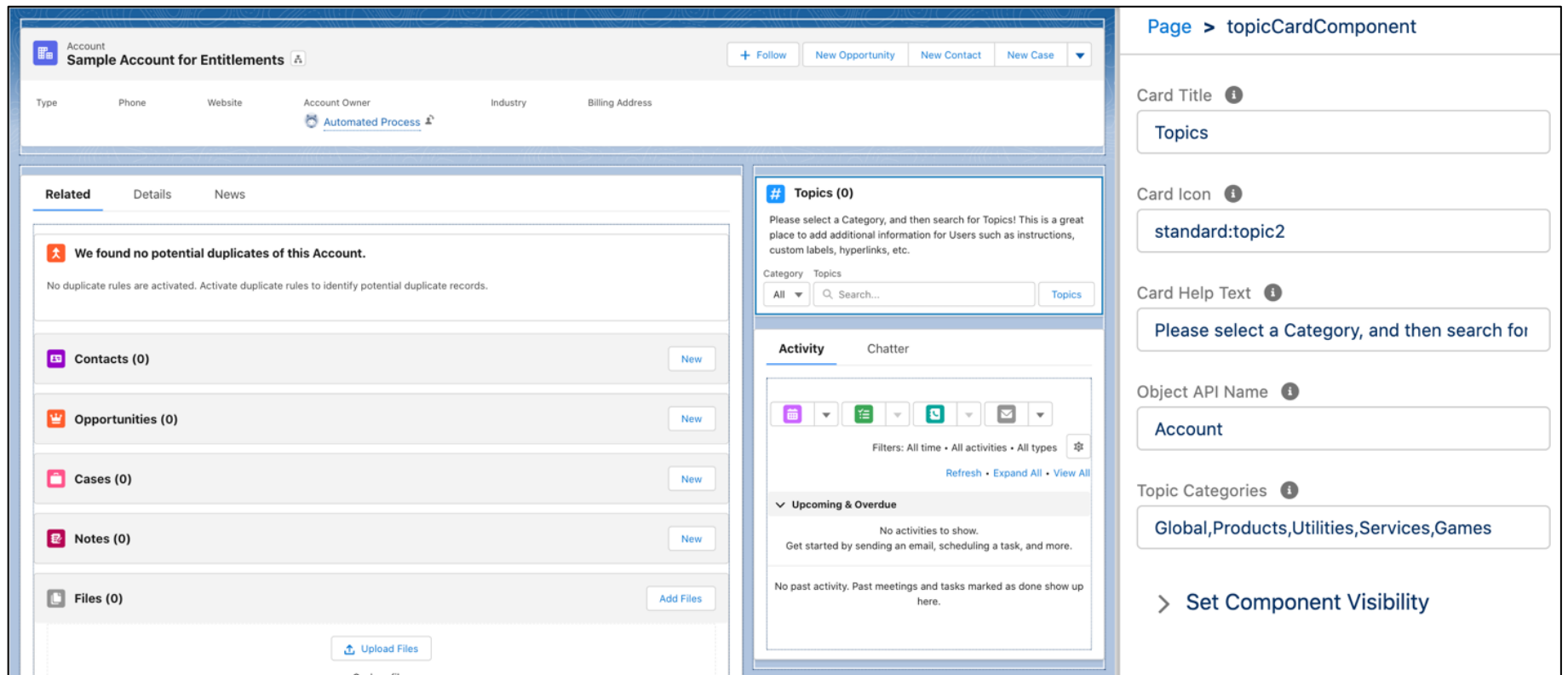
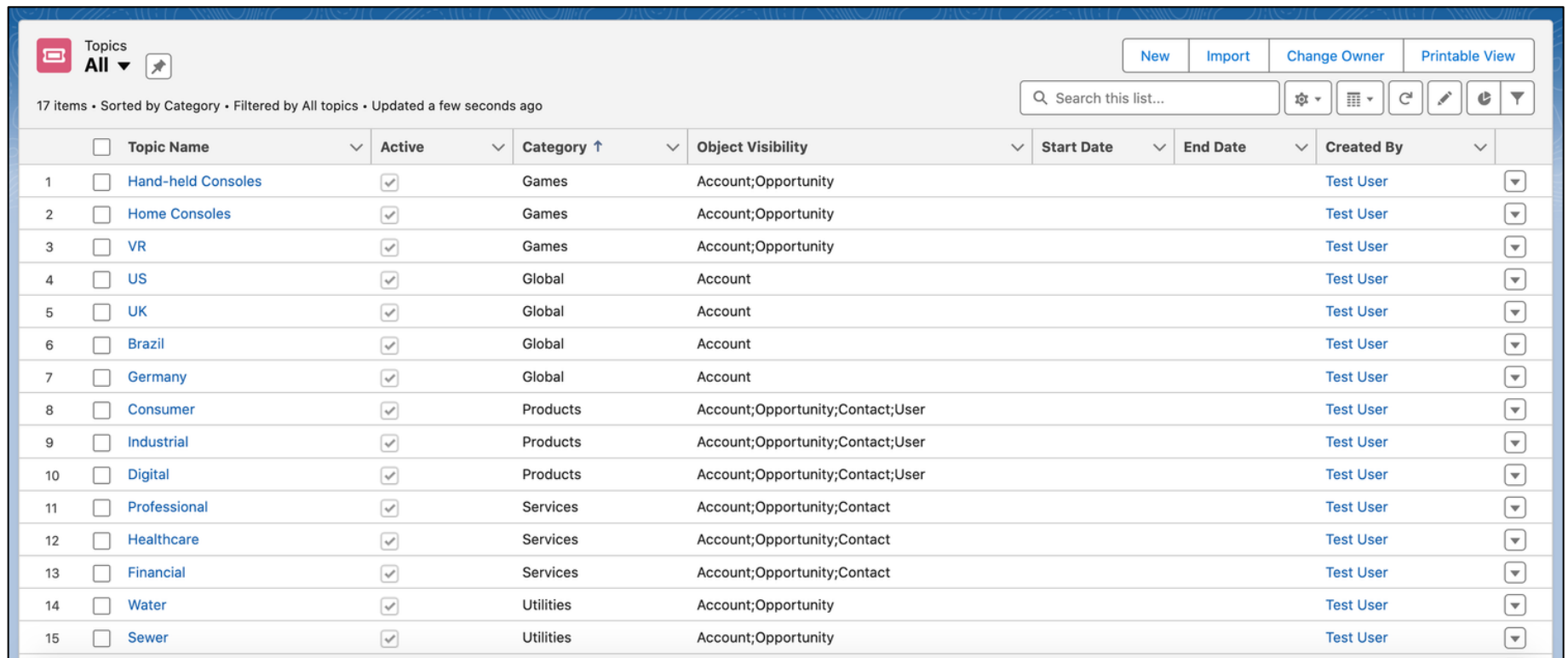


Figure 3: Sample Record Detail Page. Component has been placed in upper corner of right column. Required fields are visible in editor.

4. Create **Topic** records with required fields:

- Topic Name
- Category
- Object Visibility

Note: You can set the Topic to only be active during a period of time by setting **Start Date** and **End Date**.



	<input type="checkbox"/> Topic Name	Active	Category	Object Visibility	Start Date	End Date	Created By	
1	<input type="checkbox"/> Hand-held Consoles	<input checked="" type="checkbox"/>	Games	Account;Opportunity			Test User	<input type="button" value="v"/>
2	<input type="checkbox"/> Home Consoles	<input checked="" type="checkbox"/>	Games	Account;Opportunity			Test User	<input type="button" value="v"/>
3	<input type="checkbox"/> VR	<input checked="" type="checkbox"/>	Games	Account;Opportunity			Test User	<input type="button" value="v"/>
4	<input type="checkbox"/> US	<input checked="" type="checkbox"/>	Global	Account			Test User	<input type="button" value="v"/>
5	<input type="checkbox"/> UK	<input checked="" type="checkbox"/>	Global	Account			Test User	<input type="button" value="v"/>
6	<input type="checkbox"/> Brazil	<input checked="" type="checkbox"/>	Global	Account			Test User	<input type="button" value="v"/>
7	<input type="checkbox"/> Germany	<input checked="" type="checkbox"/>	Global	Account			Test User	<input type="button" value="v"/>
8	<input type="checkbox"/> Consumer	<input checked="" type="checkbox"/>	Products	Account;Opportunity;Contact;User			Test User	<input type="button" value="v"/>
9	<input type="checkbox"/> Industrial	<input checked="" type="checkbox"/>	Products	Account;Opportunity;Contact;User			Test User	<input type="button" value="v"/>
10	<input type="checkbox"/> Digital	<input checked="" type="checkbox"/>	Products	Account;Opportunity;Contact;User			Test User	<input type="button" value="v"/>
11	<input type="checkbox"/> Professional	<input checked="" type="checkbox"/>	Services	Account;Opportunity;Contact			Test User	<input type="button" value="v"/>
12	<input type="checkbox"/> Healthcare	<input checked="" type="checkbox"/>	Services	Account;Opportunity;Contact			Test User	<input type="button" value="v"/>
13	<input type="checkbox"/> Financial	<input checked="" type="checkbox"/>	Services	Account;Opportunity;Contact			Test User	<input type="button" value="v"/>
14	<input type="checkbox"/> Water	<input checked="" type="checkbox"/>	Utilities	Account;Opportunity			Test User	<input type="button" value="v"/>
15	<input type="checkbox"/> Sewer	<input checked="" type="checkbox"/>	Utilities	Account;Opportunity			Test User	<input type="button" value="v"/>

Figure 4: Sample Topics list view. In this example, Home Consoles is a Games Topic that will be visible on Accounts and Opportunities. US, UK, Brazil, and Germany are Global Topics that will be visible on Accounts.

5. Go to **Object** record, such as an Account, and locate the **topicCardComponent**. In the Category dropdown, select a specific category or keep as *All*.

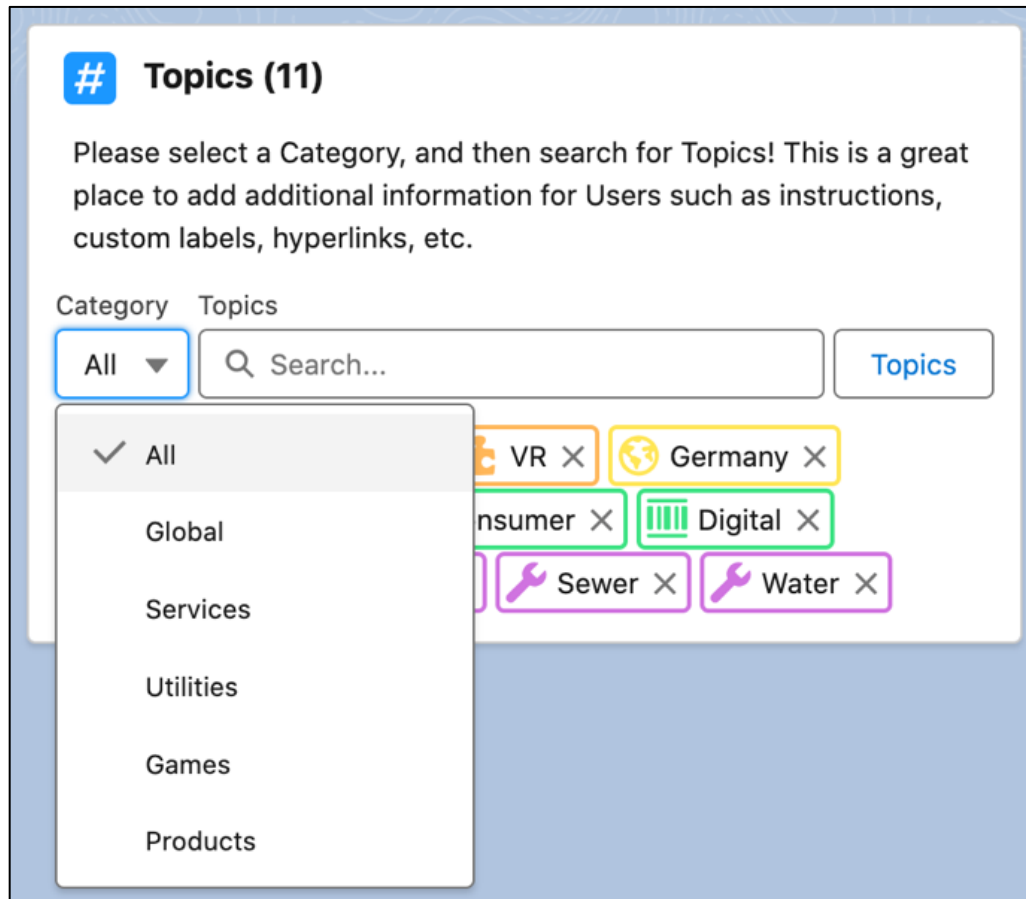


Figure 5: Sample Category dropdown list.

6. In the search input, start typing the label of a **Topic**. You will see a list of Topics matching the search value in a dropdown list.

The screenshot shows a web interface with a header section titled "# Topics (11)". Below the header, there is a text instruction: "Please select a Category, and then search for Topics! This is a great place to add additional information for Users such as instructions, custom labels, hyperlinks, etc.".

The interface includes a "Category" dropdown menu currently set to "Utilities". To the right of the category menu is a "Topics" search bar. The search bar contains the text "Elect" and a magnifying glass icon. A dropdown menu is open below the search bar, displaying two options: "Electric" (with a wrench icon) and "Create Topic **Elect**" (with a plus icon). To the right of the search bar is a button labeled "Topics".

Below the search bar, there are several category tags: "Hand-held" (with a person icon), "UK" (with a globe icon and a close button), and "Healthcare" (with a person icon). There are also some other tags partially visible, including one with a close button.

Figure 6: Sample input with search results.

7. Select a **Topic** from dropdown list by clicking on the specific row. The selected Topic will be added as a pill in a pill container below the search input. The pill color and pill style are determined by the respective custom metadata record that was set in **Step 1**. If you have opted to map a specific Topic Category to a specific field in **Step 1**, the Topic will be added to the specified multi-select picklist and the picklist value will be automatically activated on picklist field.

#

Topics (11)

Please select a Category, and then search for Topics! This is a great place to add additional information for Users such as instructions, custom labels, hyperlinks, etc.

Category

Utilities ▼

Topics

🔍 Electrid

✕

Topics

🔧 Hand-held

🔧 Electric

🌐 UK ✕

🌐 US ✕

🏠 Consumer ✕

🏠 Digital ✕

🏥 Healthcare ✕

🔧 Gas ✕

🔧 Sewer ✕

🔧 Water ✕

Figure 7: Sample search input with highlighted Topic.

Note: You can also create a new Topic using the **topicCardComponent**. Start typing the name of a new Topic that you would like to create. At the bottom of the dropdown, you will see a + and the name of the new Topic in **bold**. Clicking this row in the dropdown will take you to the standard Topic record create page. Fill out the details and click Save to create a new Topic.

The screenshot shows a web interface for managing topics. At the top, there's a header "# Topics (11)". Below it, a message says: "Please select a Category, and then search for Topics! This is a great place to add additional information for Users such as instructions, custom labels, hyperlinks, etc." The interface has two main sections: "Category" and "Topics". The "Category" section has a dropdown menu currently set to "Utilities". The "Topics" section has a search input field containing "Garbage" and a "Topics" button. A dropdown menu is open below the search input, showing "No Records Found" with a crossed-out circle icon, and a highlighted option "+ Create Topic **Garbage**". On the left side, there are several category tags: "Hand-held" (with a puzzle piece icon), "UK" (with a globe icon and a close button), and "Healthcare" (with a medical bag icon and a close button).

Figure 8: Sample search results with no matching Topics. User is highlighting option to create new Topic directly from the component.