

CN IDEAS USER GUIDE



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Overview

CN Ideas is a Salesforce Ideas Management app for Internal users and users on Experience Cloud can also use it as component. It will make the process of gathering insights on products and services, get feedback from different stakeholders in the form of Ideas, manage those Ideas and prioritize the best ideas. The CN Ideas feature serves a community of users who post, vote for, and comment on ideas.

Main Features

- Native to Salesforce Lightning Experience
- Based on type of access, user will be able to read, create, update, and delete the idea
- Ability to Post Ideas into the community.
- Every Idea will have a Status and Category
- Community user can subscribe to favorite Ideas and vote for it.
- Ideas can be filtered by Category, Status and Trending
- Ability to add Attachments to Ideas
- Alerts and Notifications on subscribed Ideas
- Upvote and downvote on Ideas
- Provide official response to a qualified Idea.

Permission Sets

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.

1. If a user requires only read ideas permission, then assign the **IdeasPermission** and **Read Ideas**.
2. If a user requires only read and create ideas permission then assign the **IdeasPermission**, **Read Ideas** and **Create Ideas**.
3. If a user requires only read, create, and update ideas permission then assign the **IdeasPermission**, **Read Ideas**, **Create Ideas** and **Update Ideas**.
4. If the user is an admin, then assign the **IdeasPermission**, **Read Ideas**, **Create Ideas**, **Update Ideas** and **Administer Ideas**.

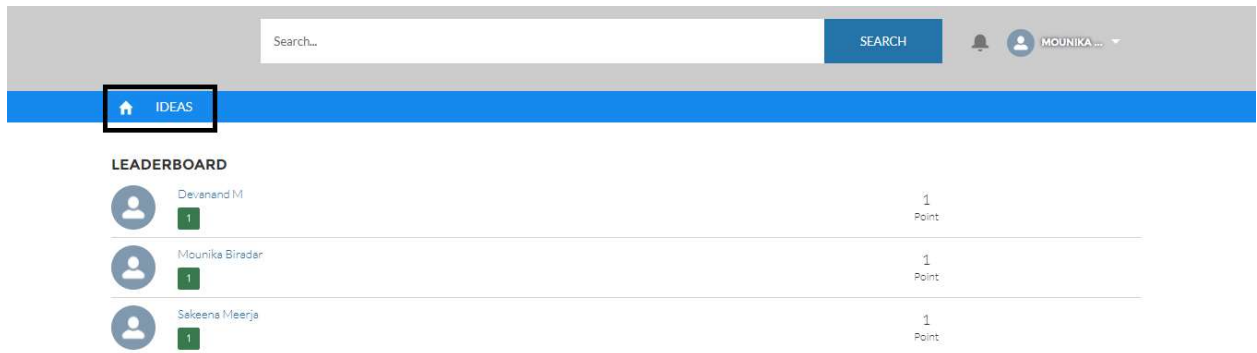
Note: Administer Ideas cannot be assigned to community users.
All Community Users must have **Ideas Permission**.

Read Ideas (Permission Set)	Update Ideas (Permission Set)	Create Ideas (Permission Set)	Administer Ideas (Permission Set)
View Ideas list - Title, Description, Category, Attachments, Status, Release Candidate, Comments count, and User details	Upvote, Downvote buttons	View Ideas list - Title, Description, Category, Attachments, Status, Release Candidate, Comments count, and User details	View Ideas list - Title, Description, Category, Attachments, Status, Release Candidate, Comments count, and User details
Like, Dislike, Subscribe and no. Points	Post Comments button	Like, Dislike, Subscribe and no. Points	Like, Dislike, Subscribe and no. Points
Filters - Trending, Categories and Status		Filters - Trending, Categories and Status	Filters - Trending, Categories and Status
Search field		Search field	Search field
Idea details like Title, Description, Category, Attachments, Status, Release Candidate, Official response (Read Only Mode)		Post Idea button	Upvote, Downvote buttons
Posted User details,		Only Title, Description, Category,	Post Idea Button

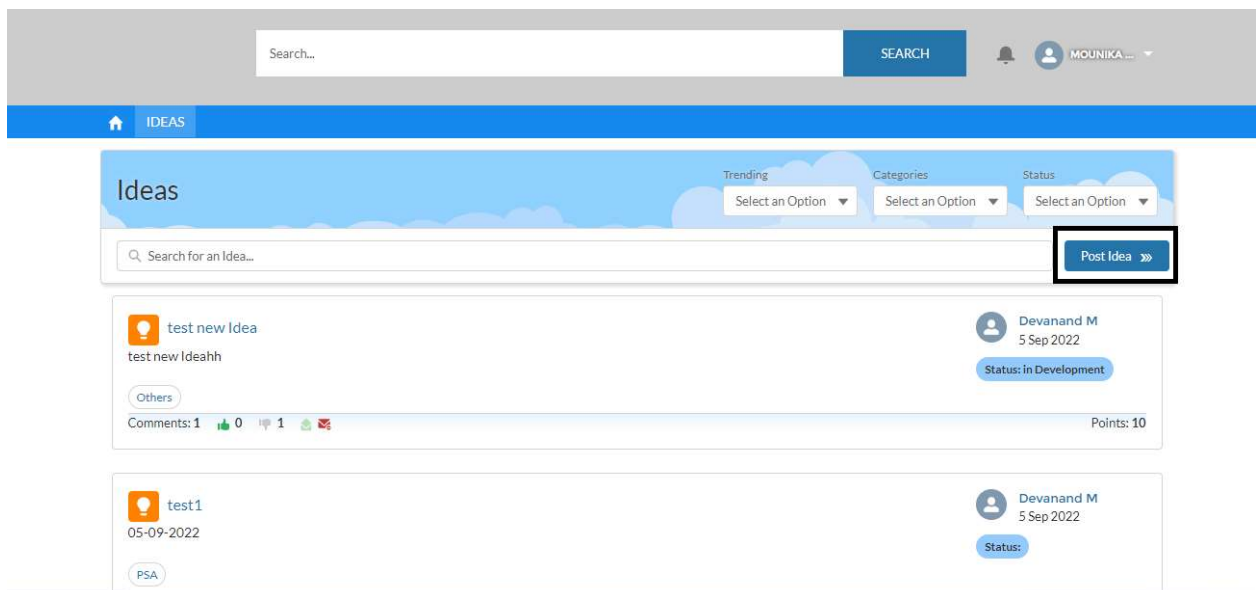
Like, Dislike and Subscribe buttons, Points		and Attachments will be editable for the Idea owner	
Comments section		Save button (Only for Idea Owner)	Idea details like Title, Description, Category, Attachments, Status, Release Candidate, Official response (In edit mode)
			Save button
			Posted User details, Like, Dislike and Subscribe buttons, Points
			Comments section
			Post Comments button
			Upvote, Downvote buttons
			Idea Admin features (i) Edit Status (ii) Mark Release Candidates (iii) Move Category (iv) Edit Official response
			Delete Idea button
			Other Admin Activities (i) Configure Upvote, Downvote Points (ii) Configure labels for fields like Prioritization, Status, Category, Official response

Creating an Idea in Community

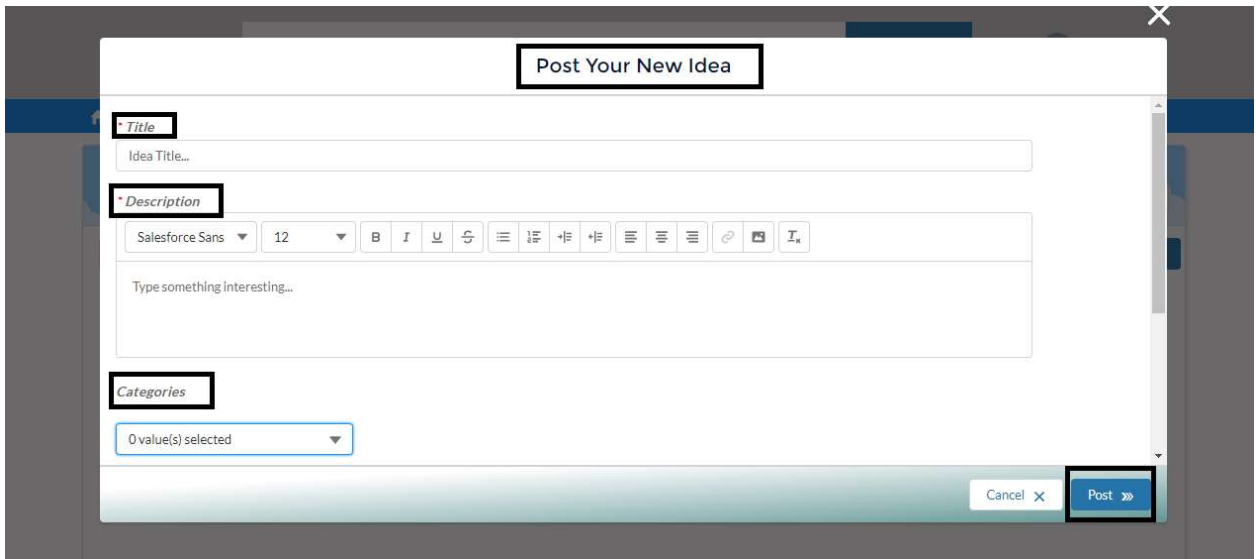
- Login with community user credentials and open community.
- Click on IDEAS



- IDEAS page is displayed and click on the post idea button.



- Fill in the Required data i.e. Title, Description and select the Categories according to the user choice. Click on the Post button to post the idea.



Post Your New Idea

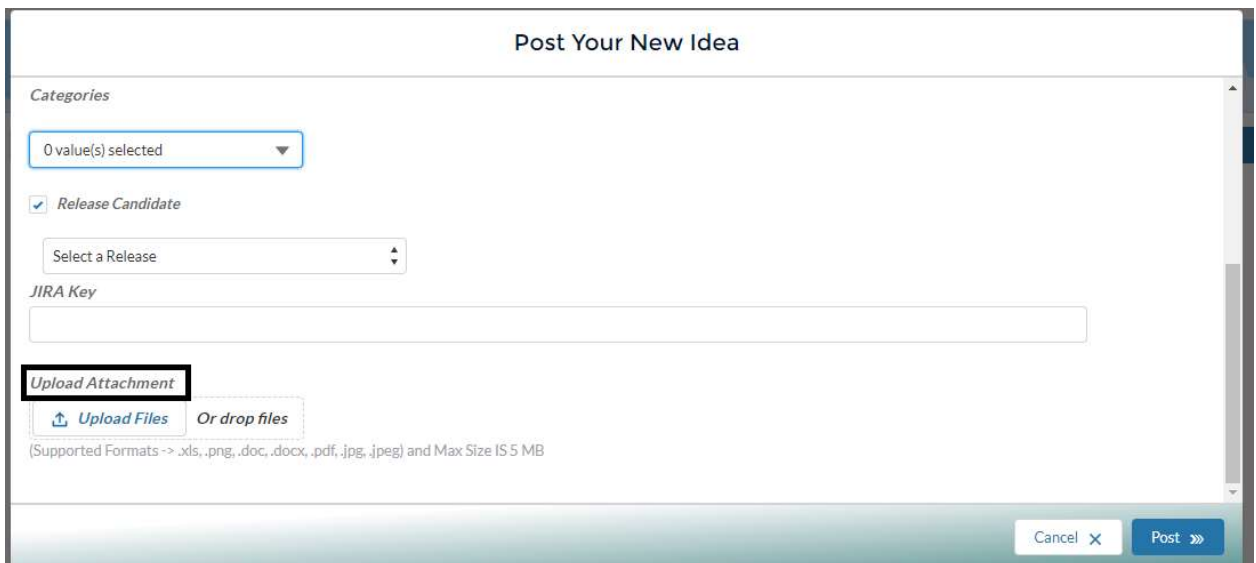
Title
Idea Title...

Description
Salesforce Sans 12 B I U Type something interesting...

Categories
0 value(s) selected

Cancel X Post »

- Users can upload attachments related to ideas they post.



Post Your New Idea

Categories
0 value(s) selected

☒ Release Candidate
Select a Release

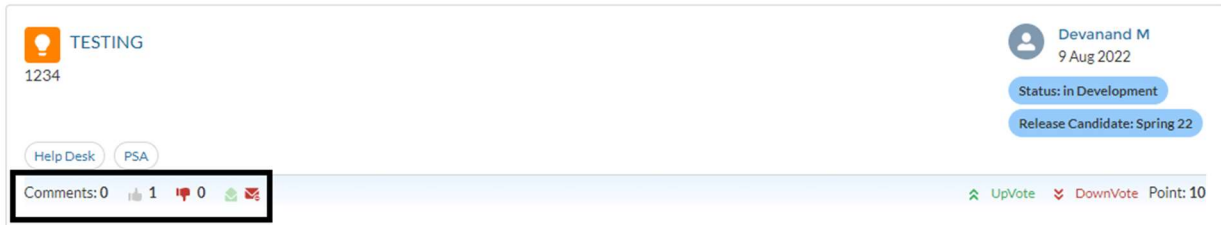
JIRA Key

Upload Attachment
Upload Files Or drop files
(Supported Formats -> .xls, .png, .doc, .docx, .pdf, .jpg, .jpeg) and Max Size IS 5 MB

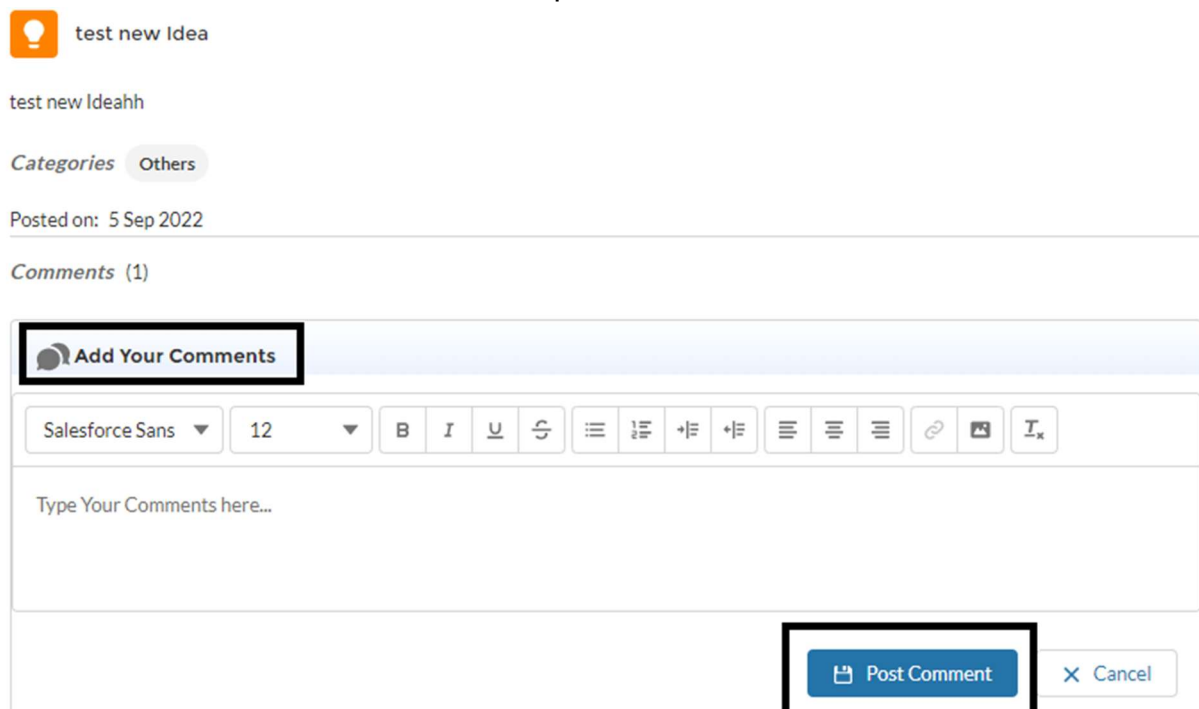
Cancel X Post »

View, Comment, Like, Dislike and Subscribe

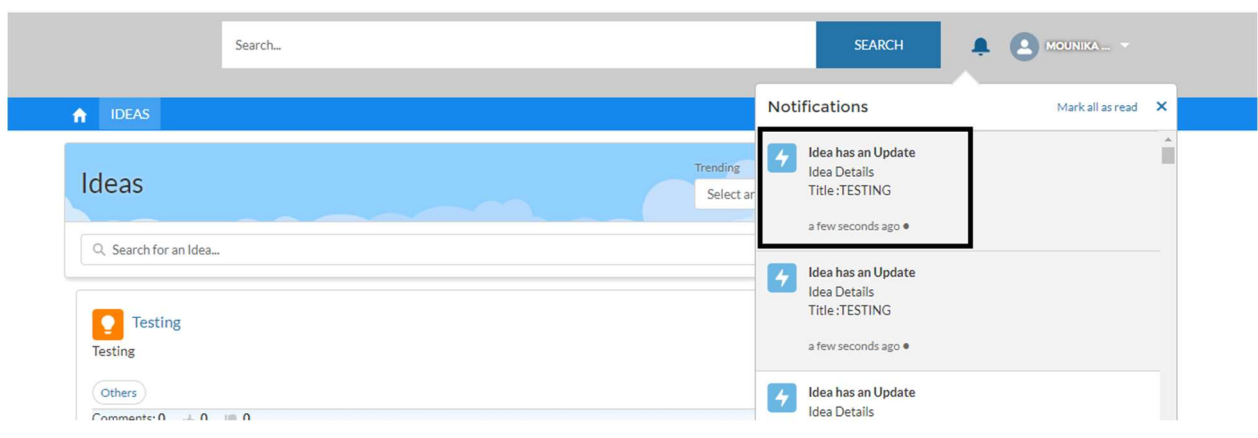
- Users can comment, like, dislike and subscribe to an idea.



- Users can add comments to the posts of other users.

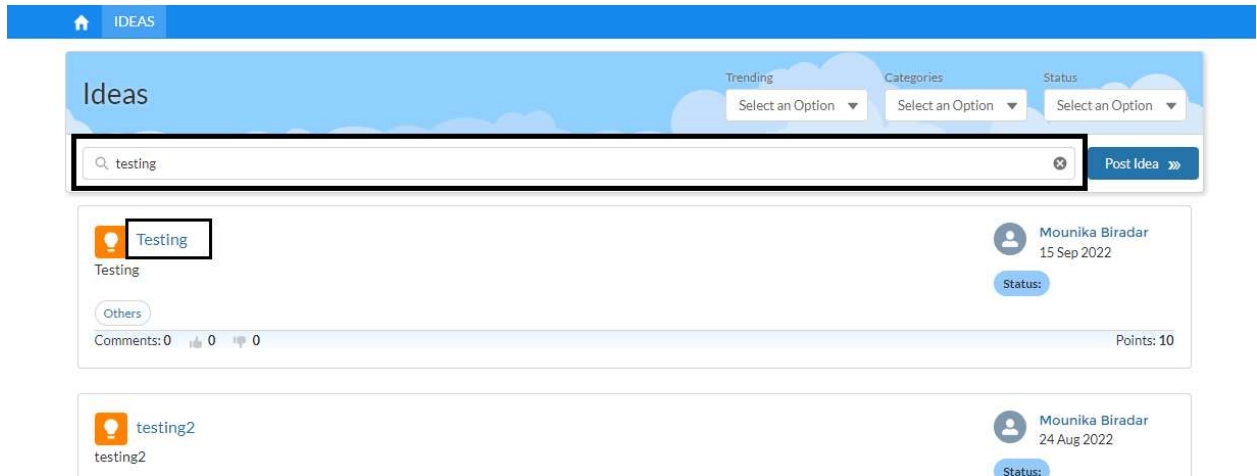


- If there is any update on ideas users can view through the notifications.



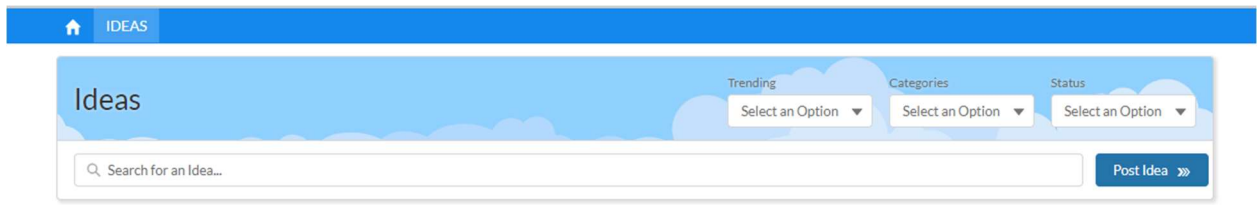
Search for Ideas

- Users can search their ideas based on the Title given from the search bar.

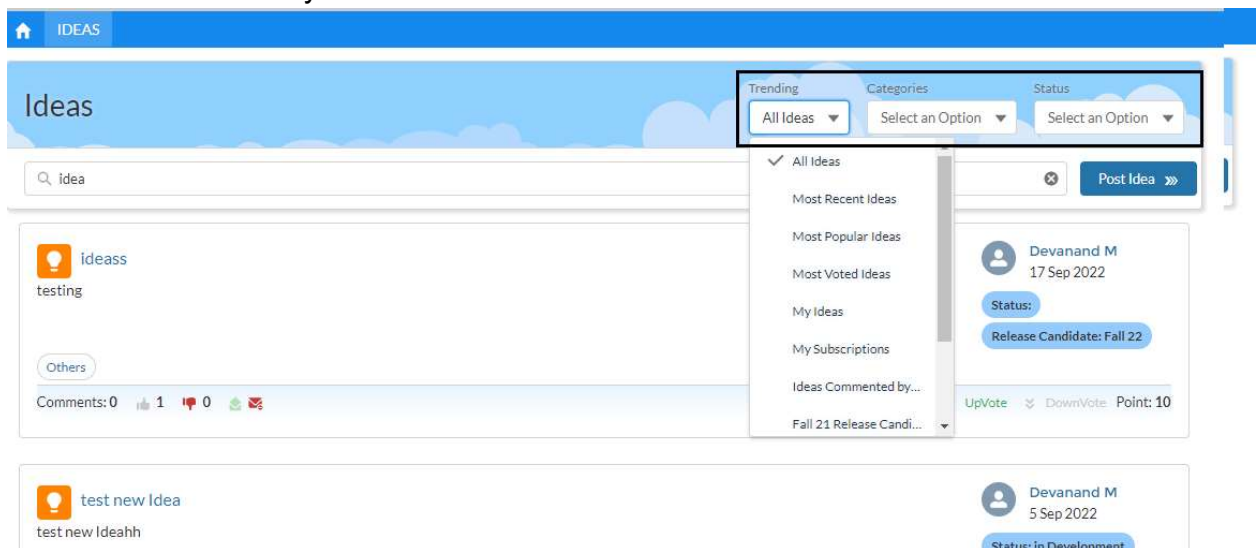


Filter and Categorize Ideas

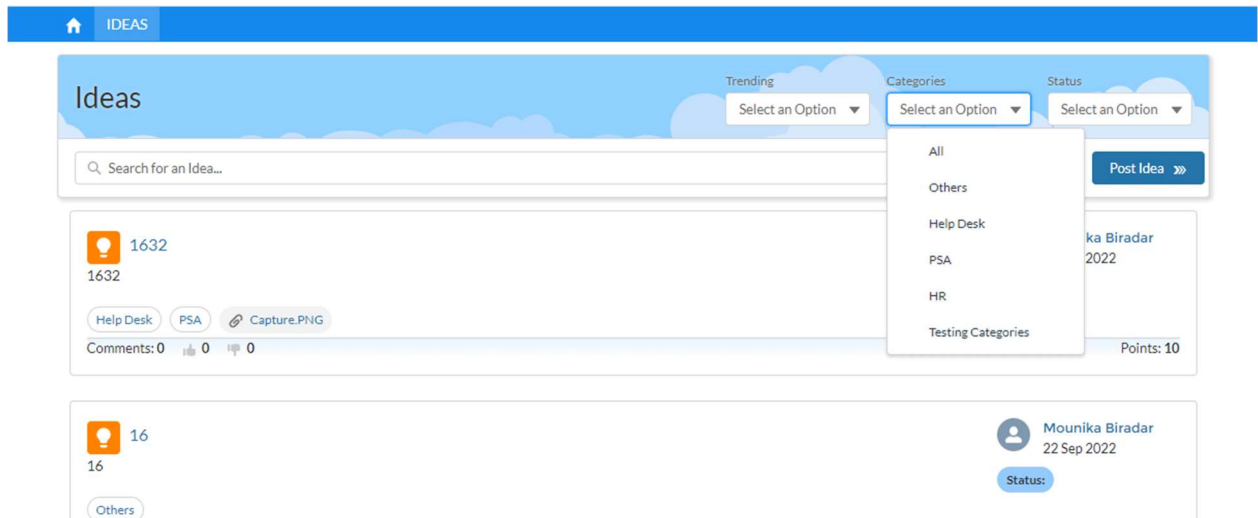
- Users can filter and view Ideas by Trending, Category and Status.



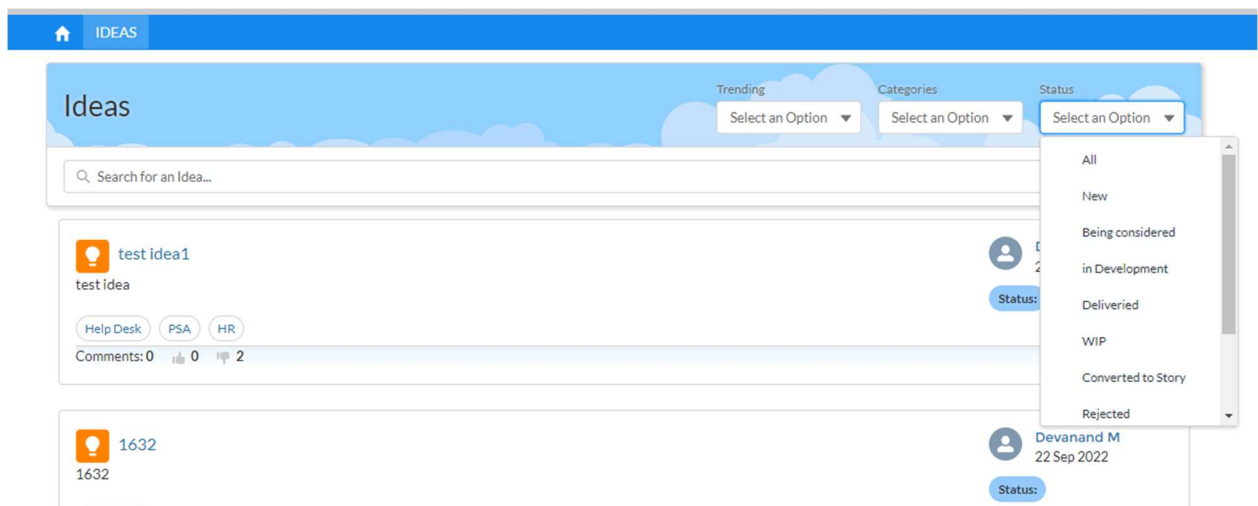
- Users can view trending filters and can select the required options. Then the user can view only the ideas related to that filter.



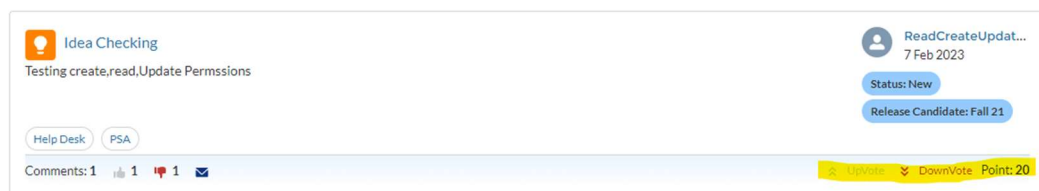
- User can search and view the ideas using Categories filter options.



- Users can search and view the ideas using status filter options.



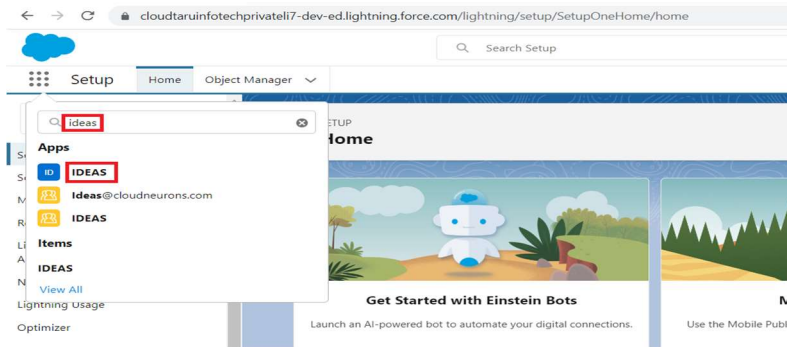
- Based on user access, the user can vote the idea (upvote and down vote) using Vote and Down Vote Buttons.



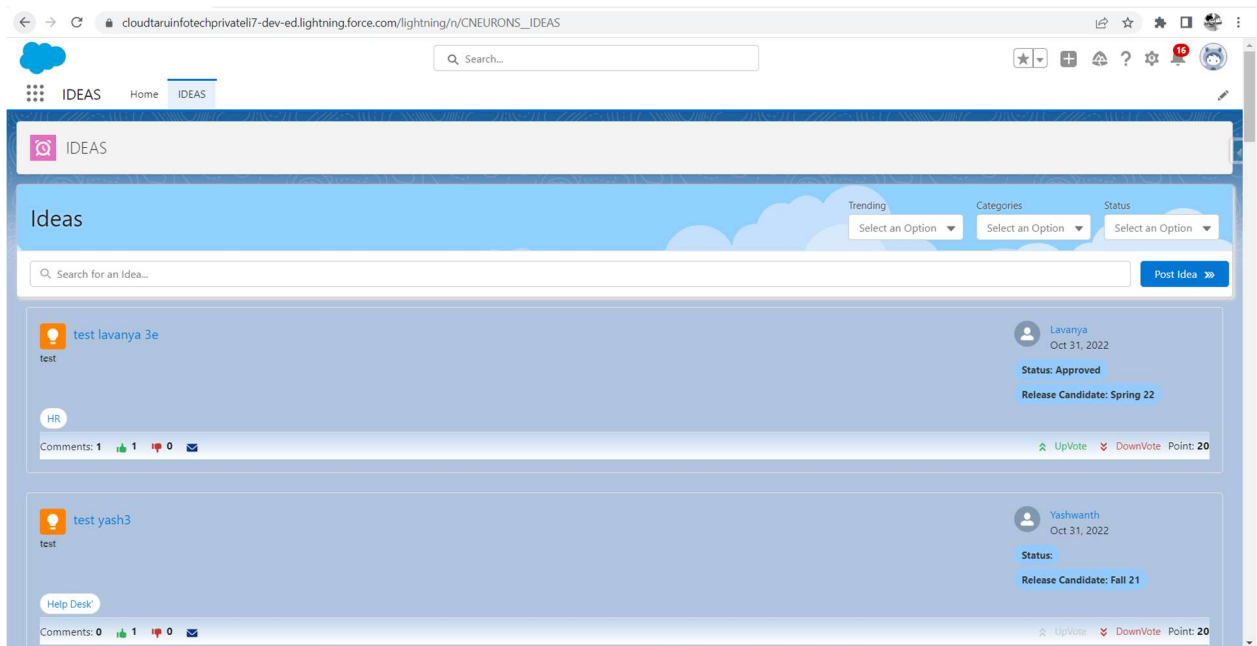
Creating an idea using Ideas App (System Admin)

System Admins also create and track the idea within the org through the application.

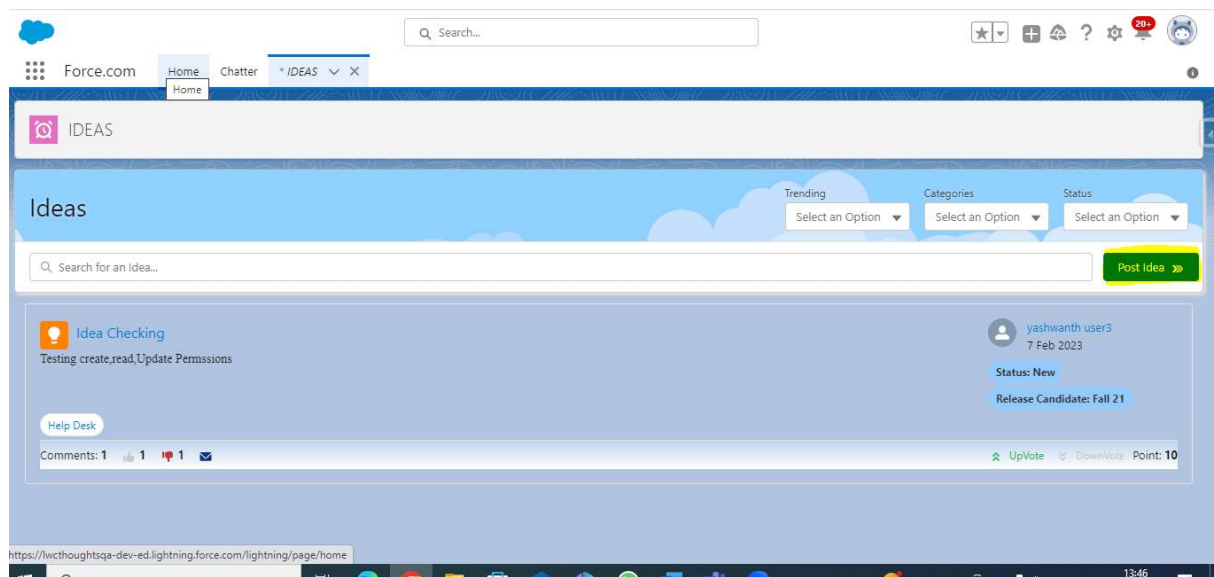
- Login to the org with valid credentials.
- Go to App Launcher, type “Ideas” and click on it.



- Click on the Ideas tab next to the home tab.

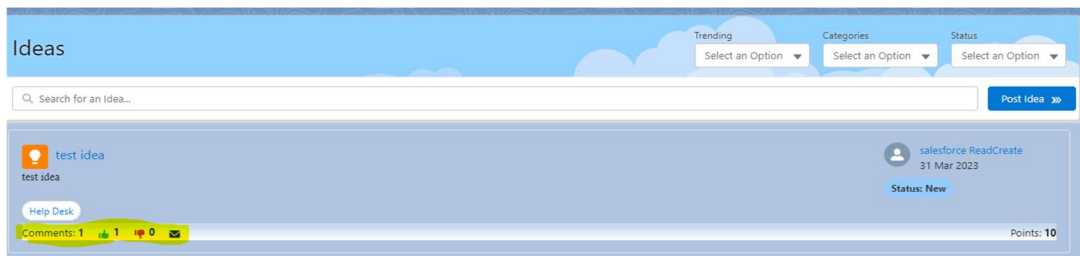


- IDEAS page is displayed and click on the post idea button.

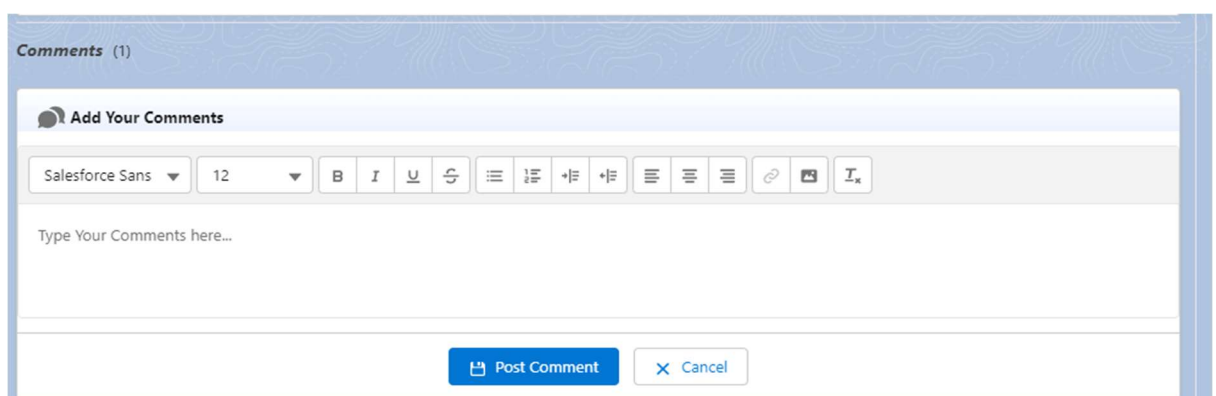


- Fill in the Required data i.e. Title, Description and select the Categories according to the user choice. Click on the Post button to post the idea.

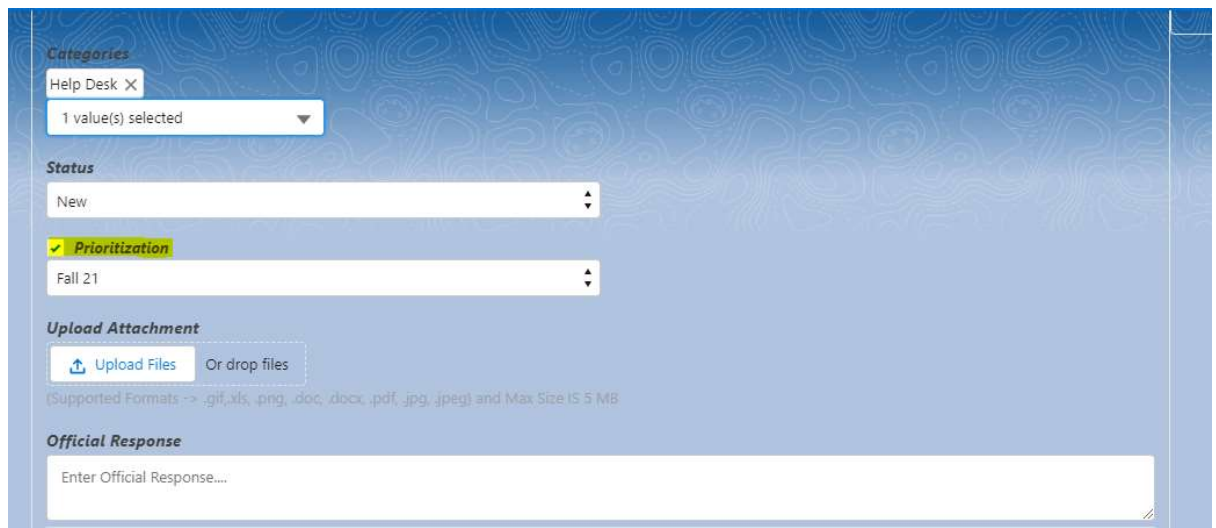
- Admin User can like or dislike and subscribe to the other users posted Ideas using Like, dislike and Subscribe buttons.



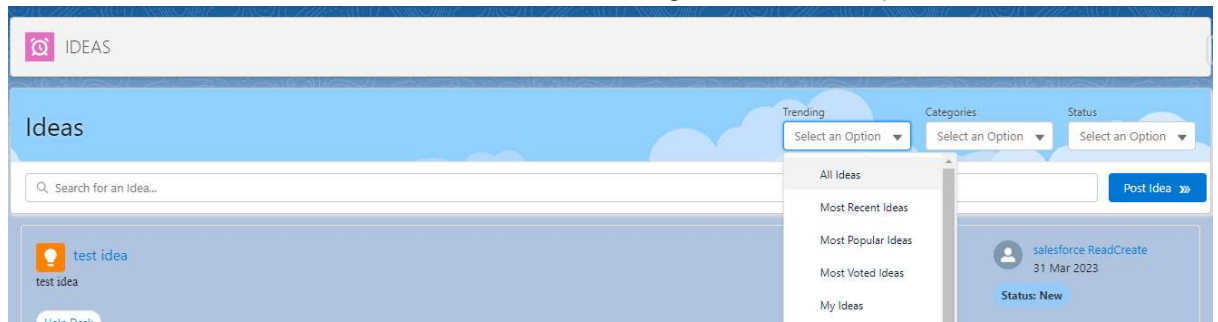
- Admin User can comment other user Posted Ideas using Post Comment button.



- Admin User can only Prioritization the idea using Prioritization check box. Check the Prioritization check box and choose the Release value.



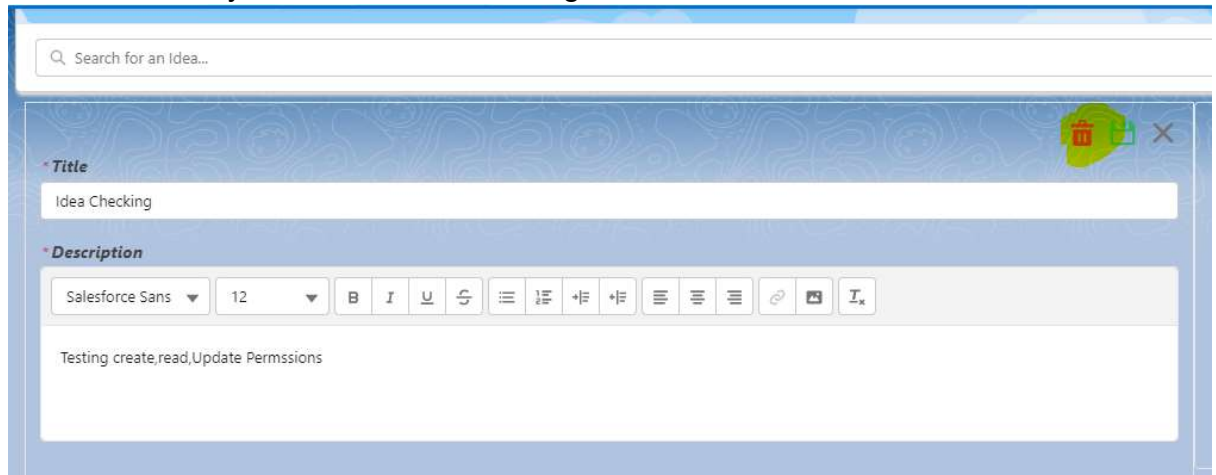
- Admin users can search and view the ideas using Search filter options.



- Admin users also voted for the idea (Upvote and Down vote).



- Admin User only deletes the Ideas using Delete button.

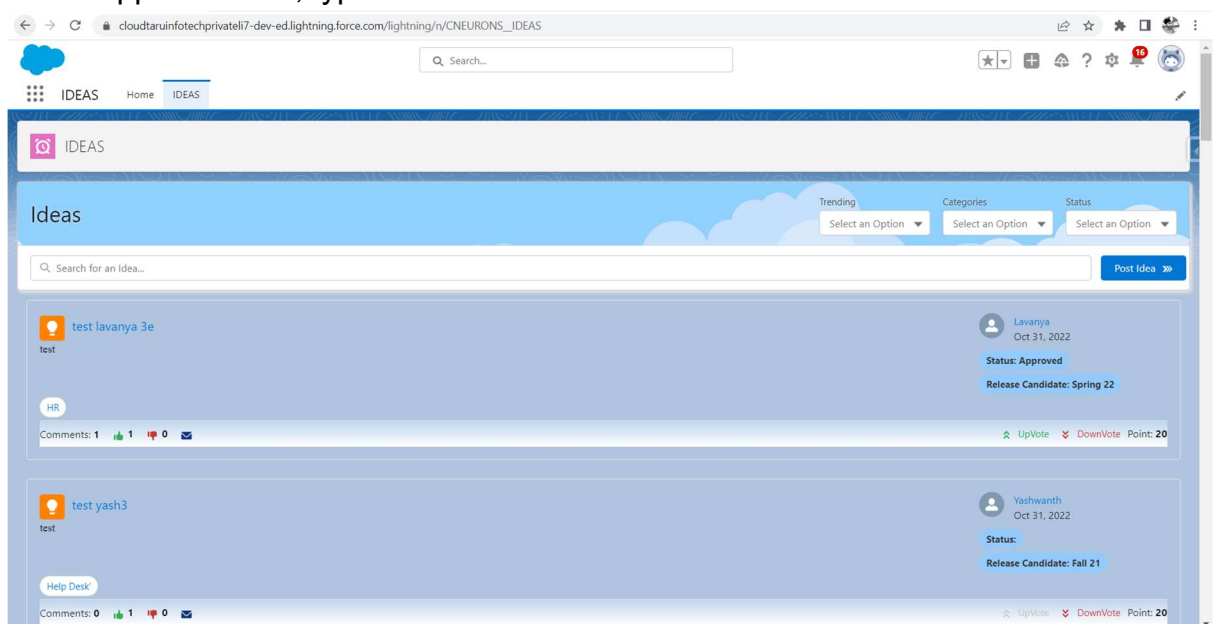


The screenshot shows the Salesforce Ideas form. At the top is a search bar labeled "Search for an Idea...". Below it is a form with two main sections: "Title" and "Description". The "Title" field contains the text "Idea Checking". The "Description" field has a rich text editor with a toolbar showing options for font face (Salesforce Sans), font size (12), bold, italic, underline, link, unlink, bulleted list, numbered list, indent, and outdent. The description text reads "Testing create,read,Update Permsns".

Creating an idea using Ideas App (Standard User)

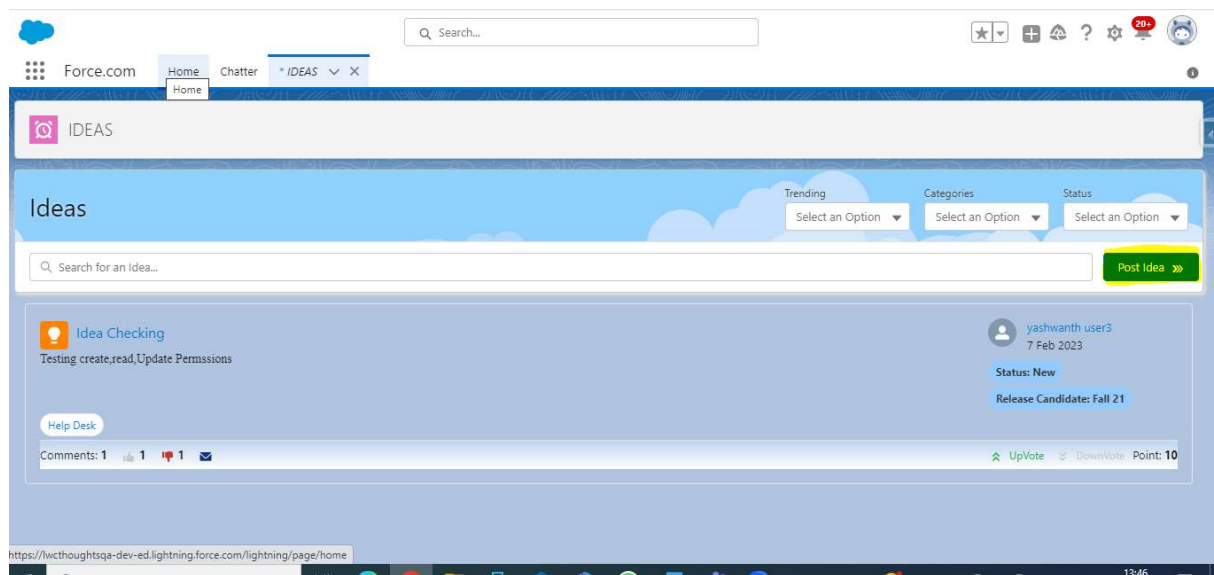
Salesforce Standard users also create and track the idea within the org through the application.

- Login to the org with valid credentials.
- Go to App Launcher, type "Ideas" and click on it.



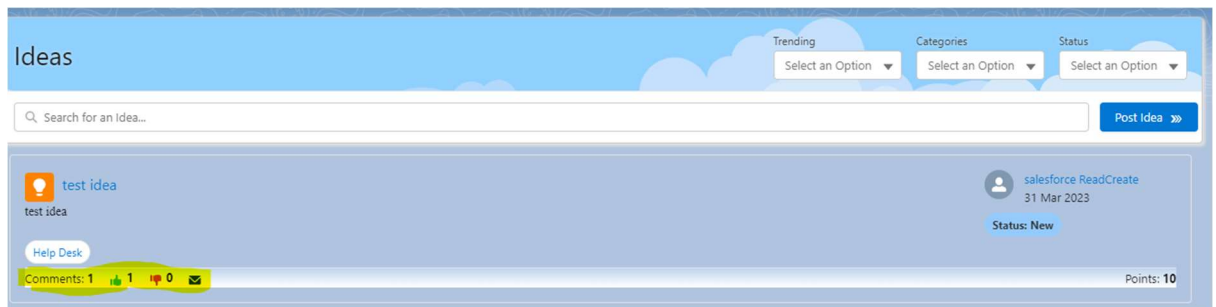
- Based on assigned permission set user will get access.

- IDEAS page is displayed and click on the post idea button.

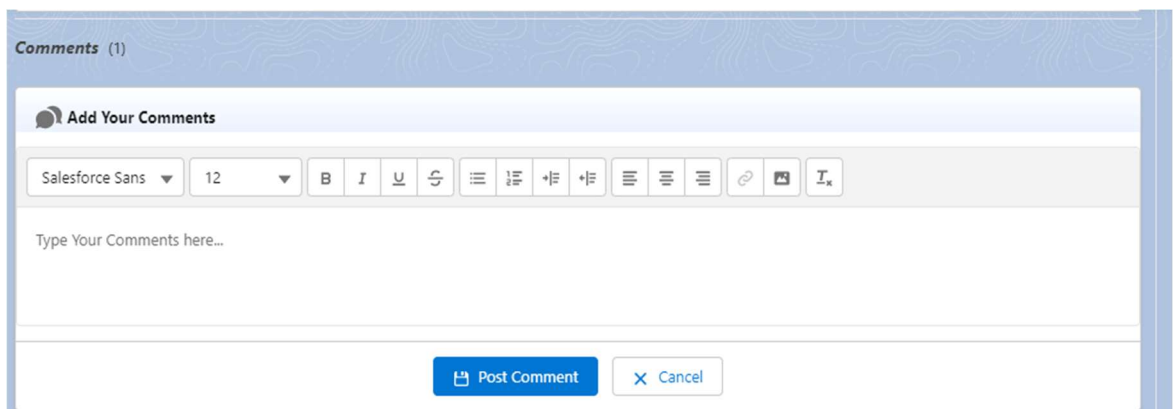


- Fill in the Required data i.e., Title, Description and select the Categories according to the user choice. Click on the Post button to post the idea.

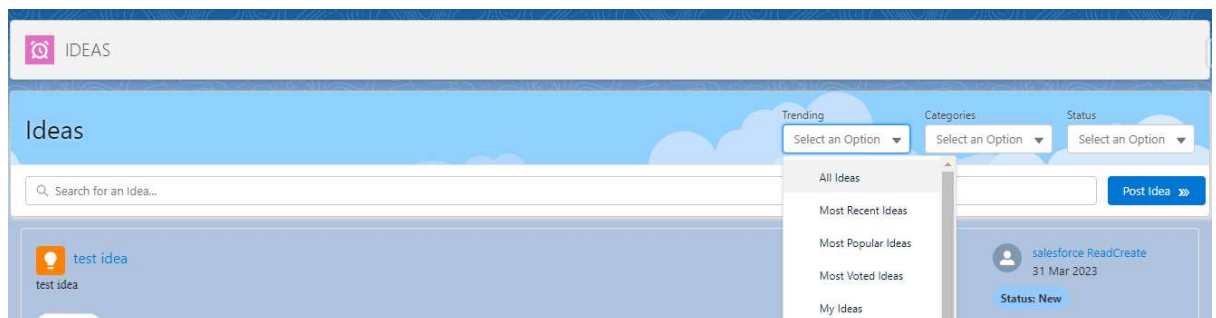
- Standard User can like or dislike and subscribe to the other users posted Ideas using Like, Dislike and Subscribe buttons.



- Standard User can comment on other user Ideas using the Post comment button.



- Standard Users can search and view the ideas using status filter options.



- Based on user access, the user can vote the idea (upvote and down vote) using Vote and Down Vote Buttons.

