



Ideas for Lightning Communities

User Manual



ASTREA IT SERVICES

C-52, SECTOR-65, Noida, U.P, India -201301

Overview

Ideas for Lightning Communities Component is a Salesforce lightning Component. This Component is used as Tab named as 'Idea' in Salesforce Lightning. User can easily access the community of Users who can post, vote and comment on Ideas without Switching back to Salesforce Classic. So that the Community members can solve problems or propose some new solutions for the Organisation.

Key Features:

- This Component works on the Standard Object i.e, Idea, IdeaComment and Community.
- The Idea Community members can simply post ideas about specific topics and other users can rationalize the Idea by making Comments.
- This feature provides a transparent way to attract, manage and showcase innovation.
- The opinions and suggestion which are posted by members of an Idea Community are organized by Zones.
- All Ideas can be sorted by internal Calculation that reflect the age of Idea's positive votes.
- All Ideas and questions can be organised in logical group, so that the particular zone have its own attention on questions and recommendations.
- Category picklist allows Users to filter your Ideas. The Administrator can define set of categories that can be added and removed from each Zone.

Configuration:

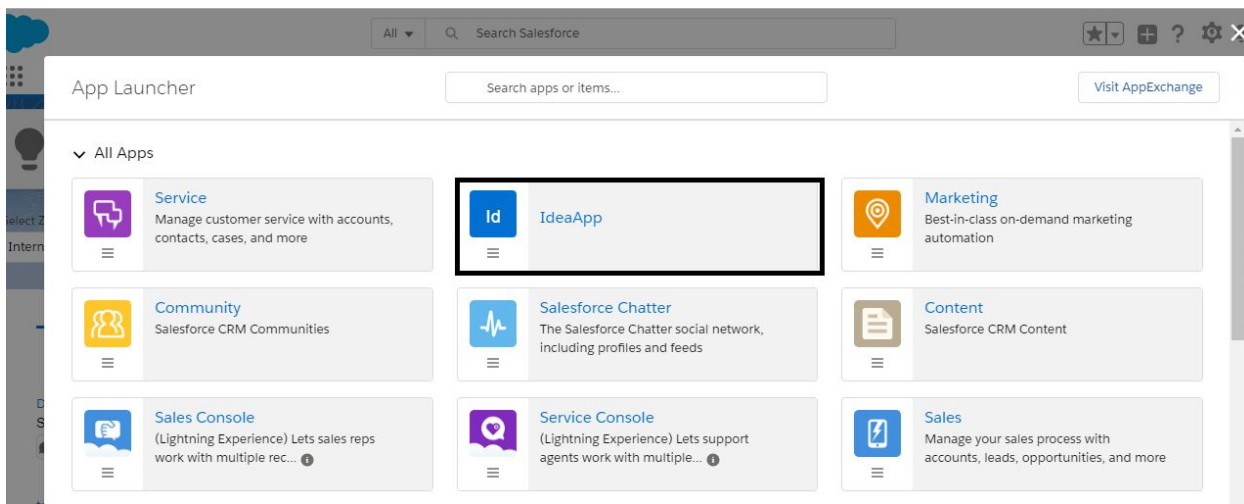
To install 'Idea for Lightning Community' in your Salesforce account follow below steps:

- Go to app listing of List View Connector on Salesforce AppExchange, click Get It Now.
- Follow the installation procedure as you will be redirected.
- Now 'IdeaApp' will be shown in App Launcher or you can add the tab named as 'Idea' in other App.
- If there is a requirement to add Category field's value then it can be filled by switching back to Classic : setup > search 'Idea' > fields > Categories > Click on 'New' to add Picklist Values.

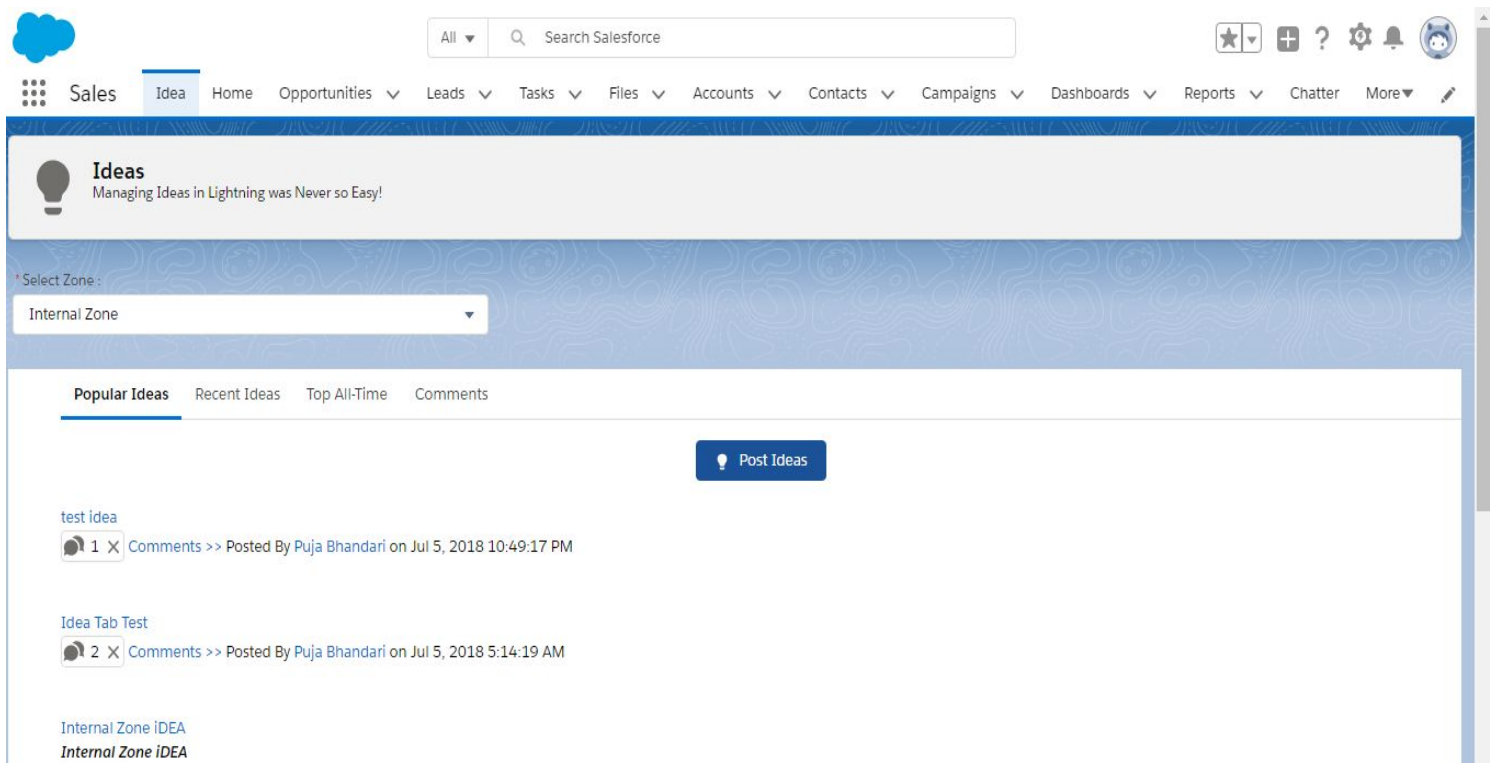
Now you can start using Idea Community in Salesforce Lightning Experience.

Getting Started:

1- Find the IdeaApp in AppLauncher.

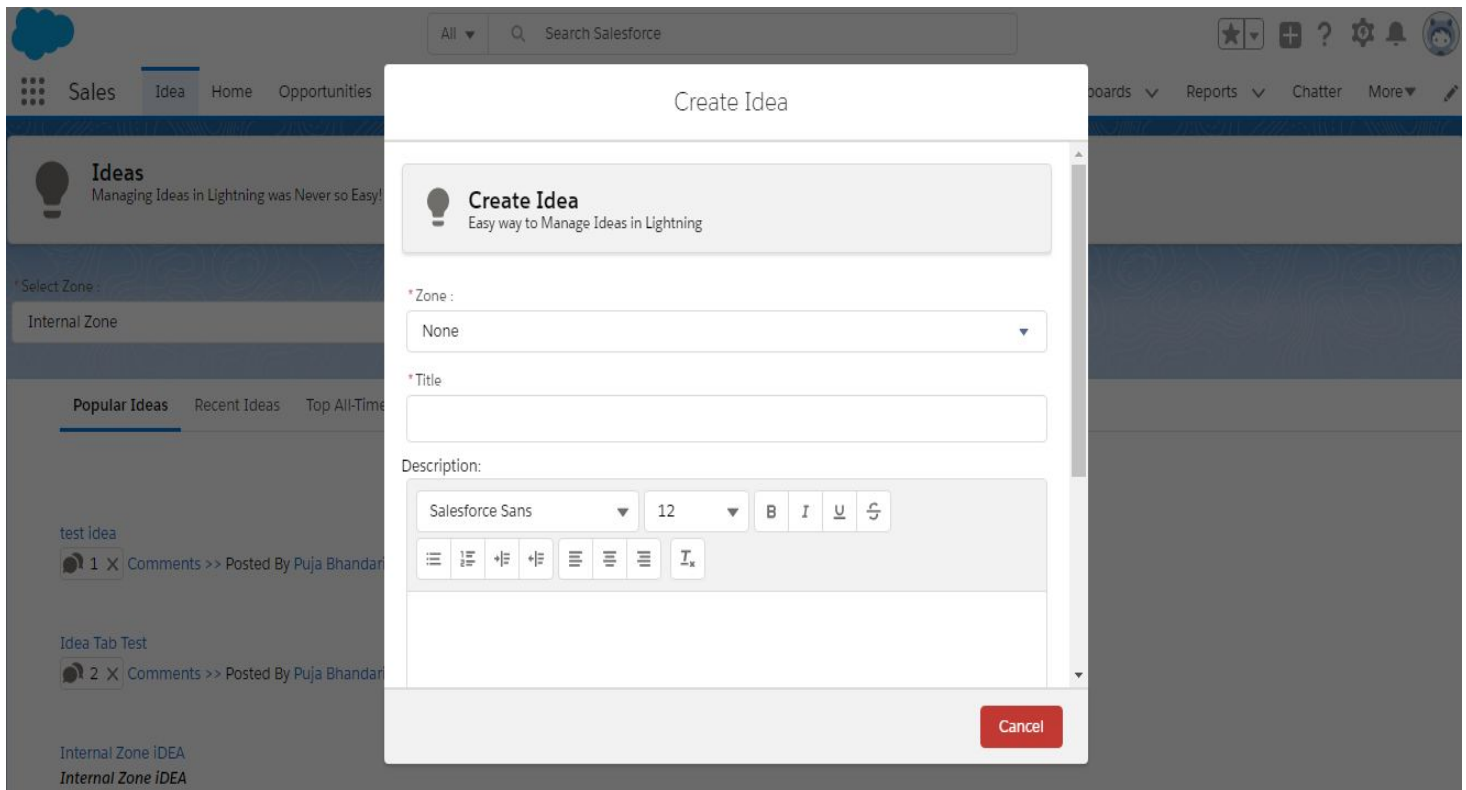


2- Add Idea Tab in your cloud Application. Example: add the Tab in Sales Cloud.



All the Ideas are displayed on the basis of Selected Zone while we click on Idea Tab. It directs to 'Popular Ideas' subtab by default.

3- On Clicking 'Post Ideas' button, we can create Idea.

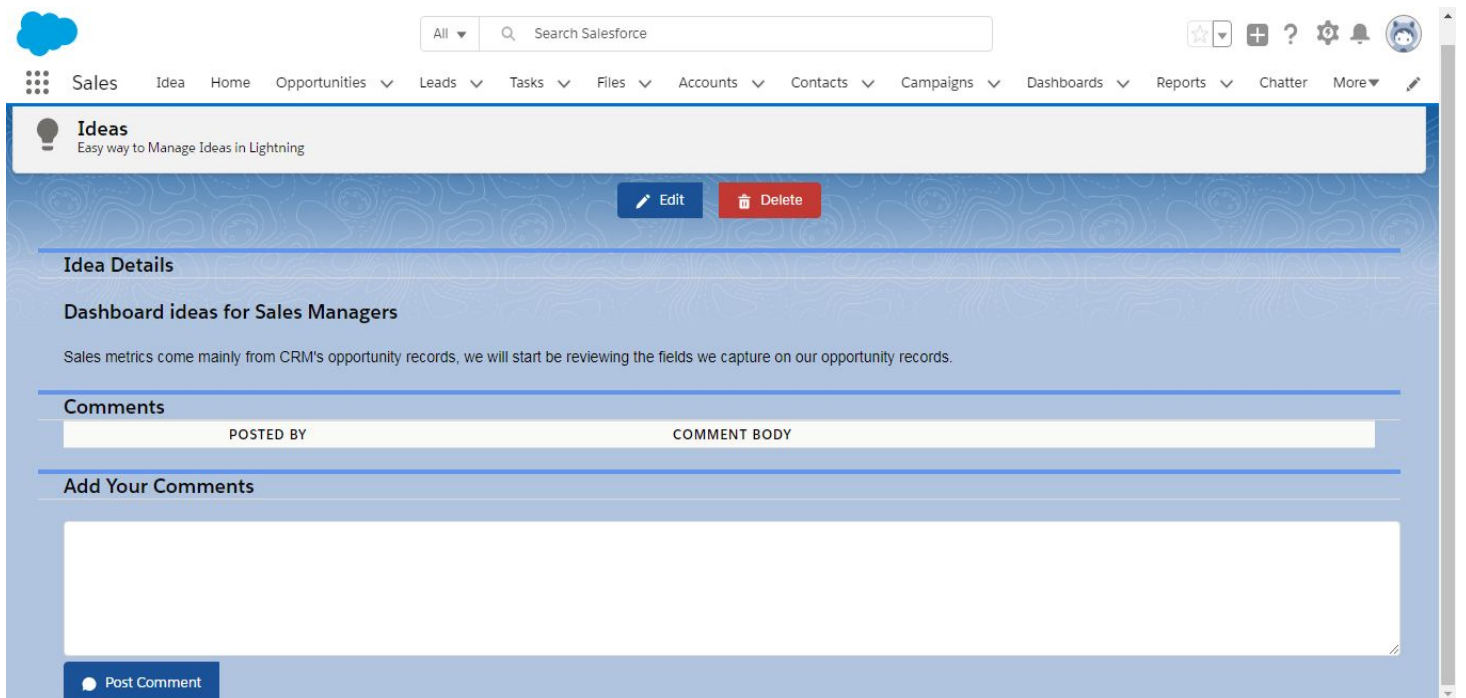


The screenshot shows the Salesforce 'Create Idea' modal window. The modal has a title bar 'Create Idea' and a subtitle 'Easy way to Manage Ideas in Lightning'. It contains a form with the following fields:

- *Zone :** A dropdown menu with 'None' selected.
- *Title :** A text input field.
- Description:** A rich text editor with a toolbar showing font face (Salesforce Sans), size (12), bold (B), italic (I), underline (U), and link (G) options. Below the toolbar is a text area for the description.

A red 'Cancel' button is located at the bottom right of the modal.

4- We can add comment on Idea by clicking on the Idea title link.



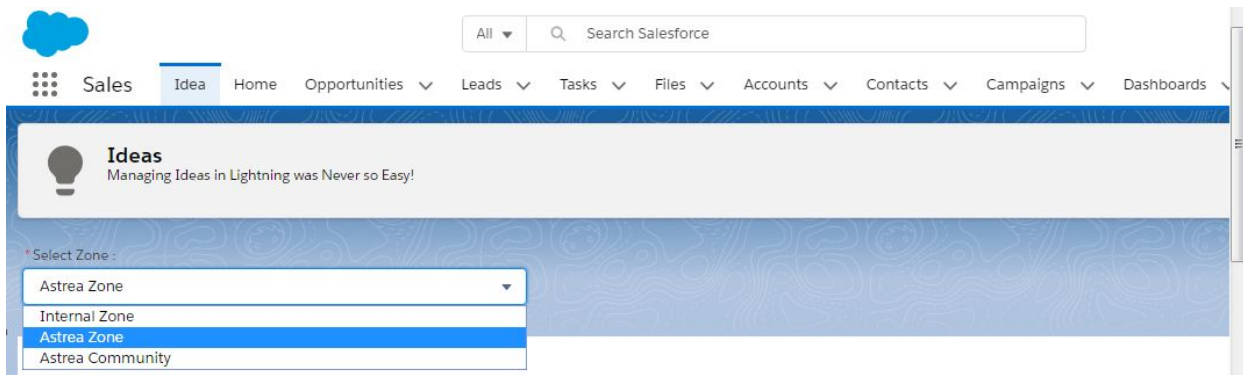
The screenshot shows the Salesforce 'Idea' detail page. The page has a header bar with the 'Idea' title and subtitle 'Easy way to Manage Ideas in Lightning'. Below the header are 'Edit' and 'Delete' buttons. The main content area is divided into sections:

- Idea Details**: A section with the title 'Dashboard ideas for Sales Managers' and a description: 'Sales metrics come mainly from CRM's opportunity records, we will start be reviewing the fields we capture on our opportunity records.'
- Comments**: A table with two columns: 'POSTED BY' and 'COMMENT BODY'.
- Add Your Comments**: A text input field for adding a new comment.

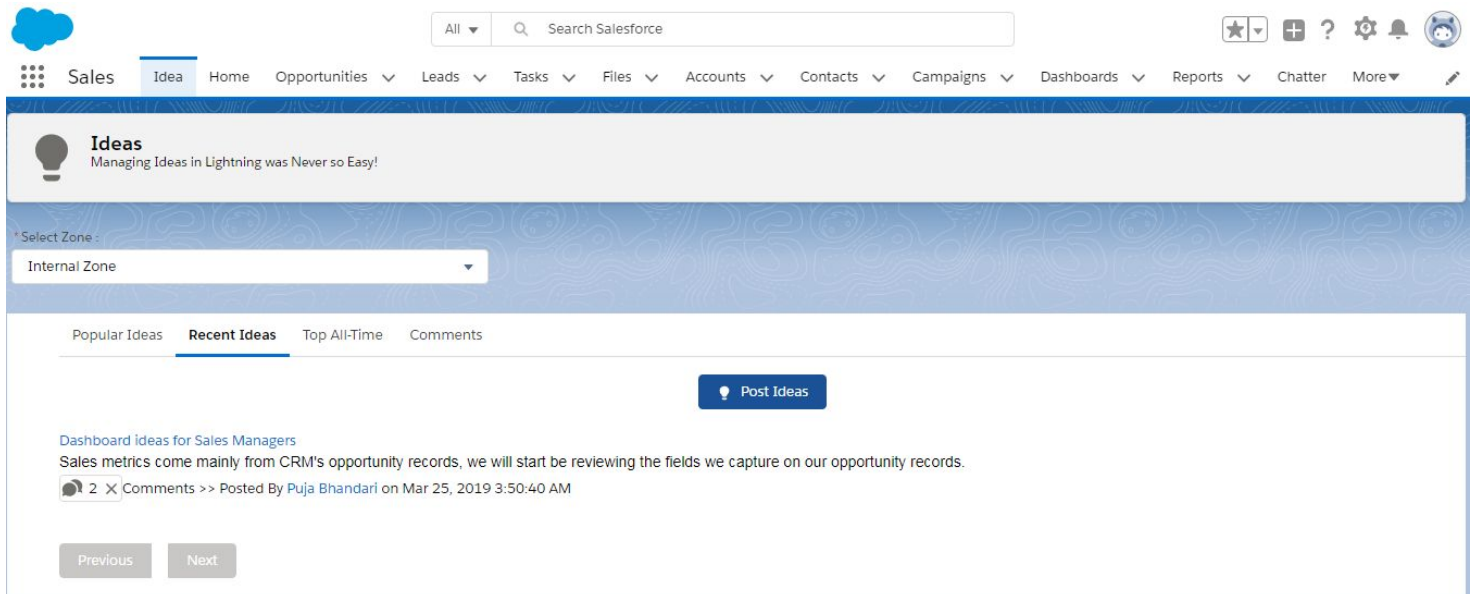
A 'Post Comment' button is located at the bottom left of the page.

Here we can Edit and Delete our Posted Idea.

5- We can display Ideas by selecting Zones. By default it is Internal Zone.



6- We can view all the recent Ideas of Idea Community by clicking 'Recent Ideas' subtab.



7- All comments can be viewed on 'Comments' sub tab.

