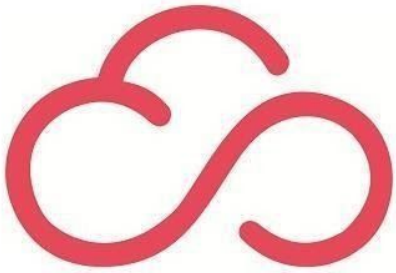

Advanced
COMMUNITIES

# AC Ideas Enterprise Component User Guide

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# OVERVIEW

AC Ideas Enterprise is the most powerful and comprehensive idea management application for Salesforce Community Cloud.

This will help you to understand the needs of your customers better and get the most valuable feedback.

Do they want to suggest something new? Would they like to improve anything they already use? This component is what you need. Engage your customers within a community and let them generate new and unique ideas using AC Ideas Enterprise.

**Main features:**

1. Sort ideas by trending, popular, recent and oldest
2. Filter ideas by category, status, and some other fields
3. Search ideas support on Global Search (using separate component)
4. Create new ideas
5. Custom fields support
6. Vote and comment on existing ideas
7. Multiple communities support
8. Auto status update
9. Display a list of similar ideas on the Idea detail page
10. Reputation points support
11. Ideas subscription support
12. Email notification support
13. Moderation tools
14. Archiving ideas
15. Two-level categories hierarchy
16. Configurable status colors
17. Flagging support

**You can configure the following features using Component settings in Community Builder:**

- set Idea's Zone name for retrieving Ideas by Zones
- set component title (visible in "Default" layout only)


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- set default items order
- set number of items per page
- choose categories source for category filter
- make filter lists collapsed by default
- display ideas numeration or not
- disable the link to user profile page if required

*Don't forget to click "Publish" to save your changes each time you change Component settings in Community Builder.*


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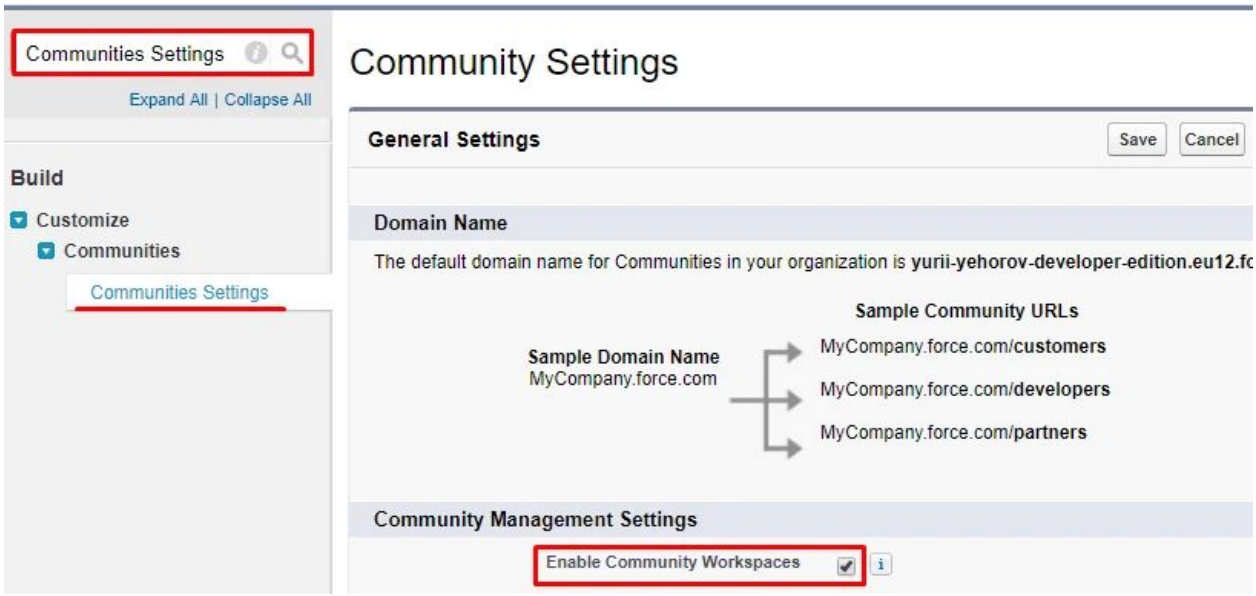
# INSTALLATION

Prerequisites:

- Communities should be enabled in setup:
  (Setup – Quick Find / Search box – Communities Settings – Enable Community – Domain name – Save)




- At least one SF Community should be configured
- Internal org domain required (Setup – Company Settings – My Domain)
- At least one idea zone with the mandatory name "TestPublic" should be configured (see Set up Ideas Zones)

Install Community Ideas package from the AppExchange or use the direct installation link if you have one.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# CONFIGURATION

Our component uses standard SF Idea object, so please make sure you familiarize yourself with standard Ideas Salesforce Documentation.

## Set up Permissions

AC Enterprise Ideas component comes with custom objects and fields. In order for the component to function properly, you need to provide appropriate access to these objects and their fields.

You can provide access in two ways:

1) Assign a user an appropriate permission set that comes with the package:

**AC Ideas Enterprise Admin** for admins or moderators

**AC Ideas Enterprise User** for community users

**IMPORTANT!**

AC Ideas Enterprise is based on the standard Salesforce Idea object. Due to the Salesforce rules, permission sets that come with packages DON'T grant access to standard objects.

In this case, for using permission sets, do the following:

- Clone existing AC Ideas Enterprise Admin and AC Ideas Enterprise User permission sets;
- Add appropriate access for admins and users to the Idea object as mentioned in the table below.

2) Set up user profiles according to the table below.

**Please, note!** When configuring object settings using the Enhanced Profile User Interface, you may notice doubled names for Ideas and Ideas Flags.
It's not a bug!
For Ideas, the first one is a standard object and a second one is a custom tab!
Both need to be configured.


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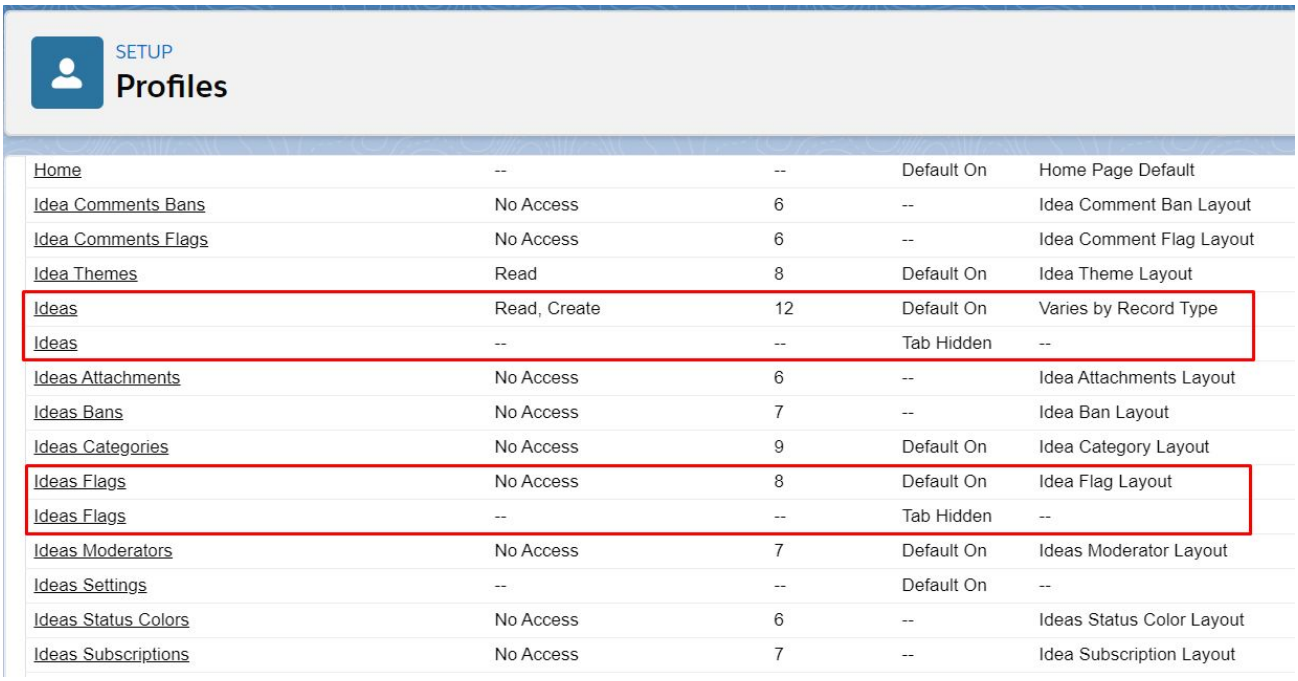
As for Ideas Flags, it is a custom object that requires configuration and an additional custom tab, that requires no configuration.




| | | | | |
|---|---|---|---|---|
| Home | -- | -- | Default On | Home Page Default |
| Idea Comments Bans | No Access | 6 | -- | Idea Comment Ban Layout |
| Idea Comments Flags | No Access | 6 | -- | Idea Comment Flag Layout |
| Idea Themes | Read | 8 | Default On | Idea Theme Layout |
| Ideas | Read, Create | 12 | Default On | Varies by Record Type |
| Ideas | -- | -- | Tab Hidden | -- |
| Ideas Attachments | No Access | 6 | -- | Idea Attachments Layout |
| Ideas Bans | No Access | 7 | -- | Idea Ban Layout |
| Ideas Categories | No Access | 9 | Default On | Idea Category Layout |
| Ideas Flags | No Access | 8 | Default On | Idea Flag Layout |
| Ideas Flags | -- | -- | Tab Hidden | -- |
| Ideas Moderators | No Access | 7 | Default On | Ideas Moderator Layout |
| Ideas Settings | -- | -- | Default On | -- |
| Ideas Status Colors | No Access | 6 | -- | Ideas Status Color Layout |
| Ideas Subscriptions | No Access | 7 | -- | Idea Subscription Layout |

## Organization-Wide Defaults (Default External Access):

**Idea Ban -** Read Only
**Idea Category** - Read Only
**Idea Comment Ban -** Read Only
**Idea Comment Flag -** Read Only
**Idea Flag -** Read Only
**Ideas Status Color -** Read Only
**Idea Subscription -** Read Only

App permissions (admin):

**AC_Enterprise_Ideas**: Visible

Tabs permissions (admin):

Ideas (separate custom tab) - Default On
Ideas Settings - Default On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Ideas Moderators - Default On
Ideas Categories - Default On
Ideas Flags - Default On

| Objects and Fields | Ideas Enterprise Admin | Ideas Enterprise User | Ideas Enterprise Guest |
|---|---|---|---|
| **Idea** | Read, Create, Edit, Delete | Read, Create | Read |
| Archived | Read, Edit | Read | Read |
| Idea on Moderation | Read, Edit | - | - |
| Official Answer | Read, Edit | Read | Read |
| Official Answer Date | Read, Edit | Read | Read |
| Status | Read, Edit | Read | Read |
| **Idea Attachment** | Read, Create, Edit, Delete | Read, Create,Edit, Delete | Read |
| **Idea Ban** | Read, Create, Edit, Delete | - | - |
| Ban Reason | Read, Edit | - | - |
| Idea | Read, Edit | - | - |
| **Idea Category** | Read, Create, Edit, Delete | Read | Read |
| Order | Read, Edit | Read | Read |
| Parent Category | Read, Edit | Read | Read |
| Zones | Read, Edit | Read | Read |
| **Idea Comment Ban** | Read, Create, Edit, Delete | - | - |
| CommentId | Read, Edit | - | - |


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| | | | |
|---|---|---|---|
| **Idea Comment Flag** | Read, Create, Edit, Delete | Read, Create | Read |
| CommentId | Read, Edit | Read, Edit | Read |
| **Idea Flag** | Read, Create, Edit, Delete | Read, Create | Read |
| Idea Title | Read | Read | Read |
| Flag Message | Read, Edit | Read, Edit | Read |
| **Idea Moderator** | Read, Create, Edit, Delete | - | - |
| Categories | Read, Edit | - | - |
| Moderator | Read, Edit | - | - |
| **Idea Status Colors** | Read, Create, Edit, Delete | Read | Read |
| Color | Read, Edit | Read | Read |
| **Idea Subscription** | Read, Edit, Delete | Read, Create, Edit, Delete | Read |
| Idea | Read, Edit | Read, Edit | Read |
| User | Read, Edit | Read, Edit | Read |
| **Status Update Rule** | Read, Create, Edit, Delete | Read | Read |
| Status | Read, Edit | Read | Read |

## Apex Classes Access

According to the Salesforce access restriction to @AuraEnabled Apex Methods for Guest and Portal Users, provide access for external users (including guests) to the following Apex Classes:

acideas.brCustomCategoriesController
acideas.brCustomCategoryCreateFormController


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acideas.brCustomCategoryDeleteController
acideas.brCustomCategoryDetailsController
acideas.brCustomCategoryEditFormController
acideas.brCustomCategoryFormController
acideas.brFieldWrap
acideas.brGlobalInfoController
acideas.brGlobalSearchResultController
acideas.brIdeaCommentDeleteController
acideas.brIdeaCommentsController
acideas.brIdeaCommentWrap
acideas.brIdeaCreateFormController
acideas.brIdeaDeleteController
acideas.brIdeaDetailsController
acideas.brIdeaEditController
acideas.brIdeaFormController
acideas.brIdeasCommonSettingsController
acideas.brIdeasListController
acideas.brIdeasListFilterController
acideas.brIdeasListItemController
acideas.brIdeasModerationSettingsController
acideas.brIdeasModerationUtils
acideas.brIdeaStatusController
acideas.brIdeasZoneSettingsController
acideas.brIdeaUnsubscribeController
acideas.brIdeaVotesListController
acideas.brIdeaWrap
acideas.brLexIdeasController
acideas.brLexIdeasSettingsController
acideas.brMergedIdeasListController
acideas.brRelatedIdeasListController
acideas.brStatusColorsController
acideas.brStatusUpdateRulesController
acideas.brTestFieldWrap
acideas.brUserDisplayNameController
acideas.brUserInfoController
acideas.brFilesManager

To set Apex class security from a profile:

1. From Setup, enter Profiles in the Quick Find box, then select **Profiles**.


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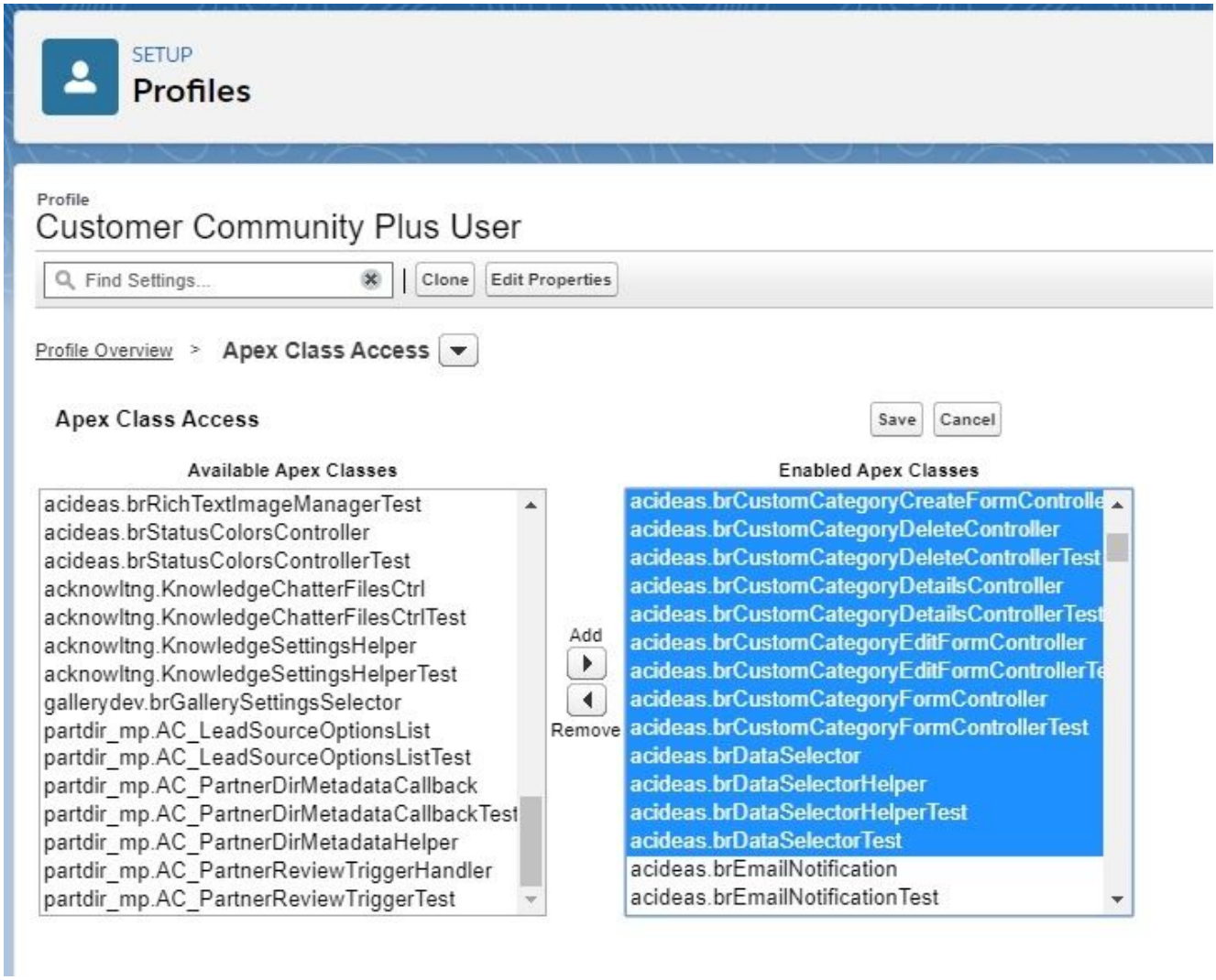
We recommend using the Enhanced Profile User Interface to see the full list of available Apex classes!

2. Select a profile.
3. In the Apex Class Access page or related list, click **Edit**.
4. Select the Apex classes that you want to enable from the Available Apex Classes list and click **Add**.




## Custom Settings Access

AC Ideas Enterprise uses Custom Settings. To make this data visible for users on the community, provide them with the read access to the following custom settings: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acideas.Ideas Common Settings
acideas.Ideas Zone Settings

Only users with Customize Application permission can provide access to custom settings.

To grant a specific profile or permission set read access to custom settings:

1. Search for Profiles or Permission Sets from Setup, then click the name of the profile or permission set.
2. Click the **Custom Setting Definitions** permission.
3. Click **Edit**, add the custom setting to the Enabled Custom Setting Definitions list, then click **Save**.


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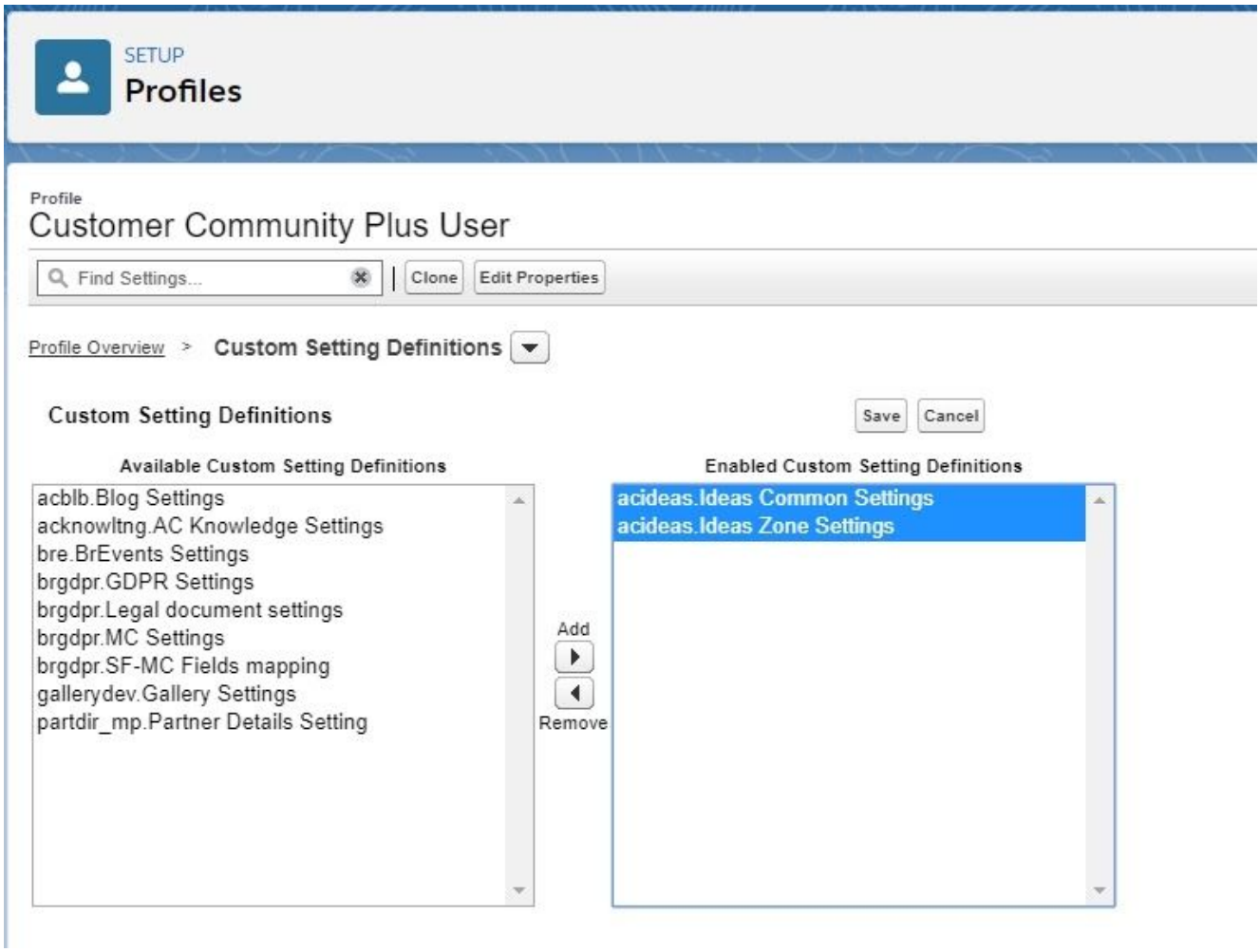


### Guest users

In order for an external user who is not logged in the community to see the list of Ideas, you need to do the following:

1) Go to the Community Builder Settings tab – choose General section – click Guest User Profile;
2) Found Standard Field-Level Security section – click "View" next to Idea;
3) Click "Edit" – enable "Read access" for Archived field – Save.

## Set up Ideas Zones

**Important!**


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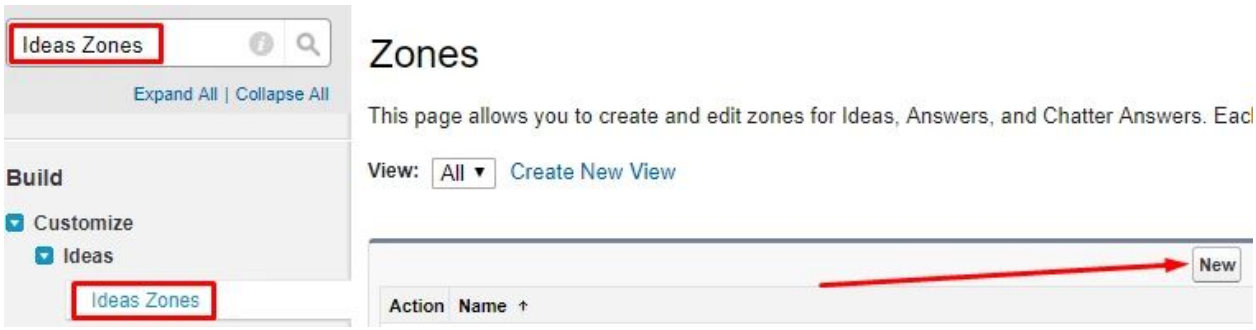
Create a mandatory Idea Zone with the name **"TestPublic"** and assign it to the community. It is necessary for running apex tests and for the correct component functioning.

To set up Ideas Zones use Salesforce Classic Interface.

Ideas Zones are used for separating different sets of Ideas. You only need to set up the Ideas Zones:
- If you are using Ideas on a community and internally (to collect Ideas from your employees, for example)
- If you have two or more communities with different sets of Ideas

**To create Ideas Zone, go to:**

1. Setup – Quick Find / Search – Ideas Zones – click New.




2. Fill the Name, optionally add a description. Enable the "Active" checkbox and choose the username format you want to be displayed in this Zone. Fill the Visibility section. From the drop-down list, choose the community which this Zone will be shown in. Click Save.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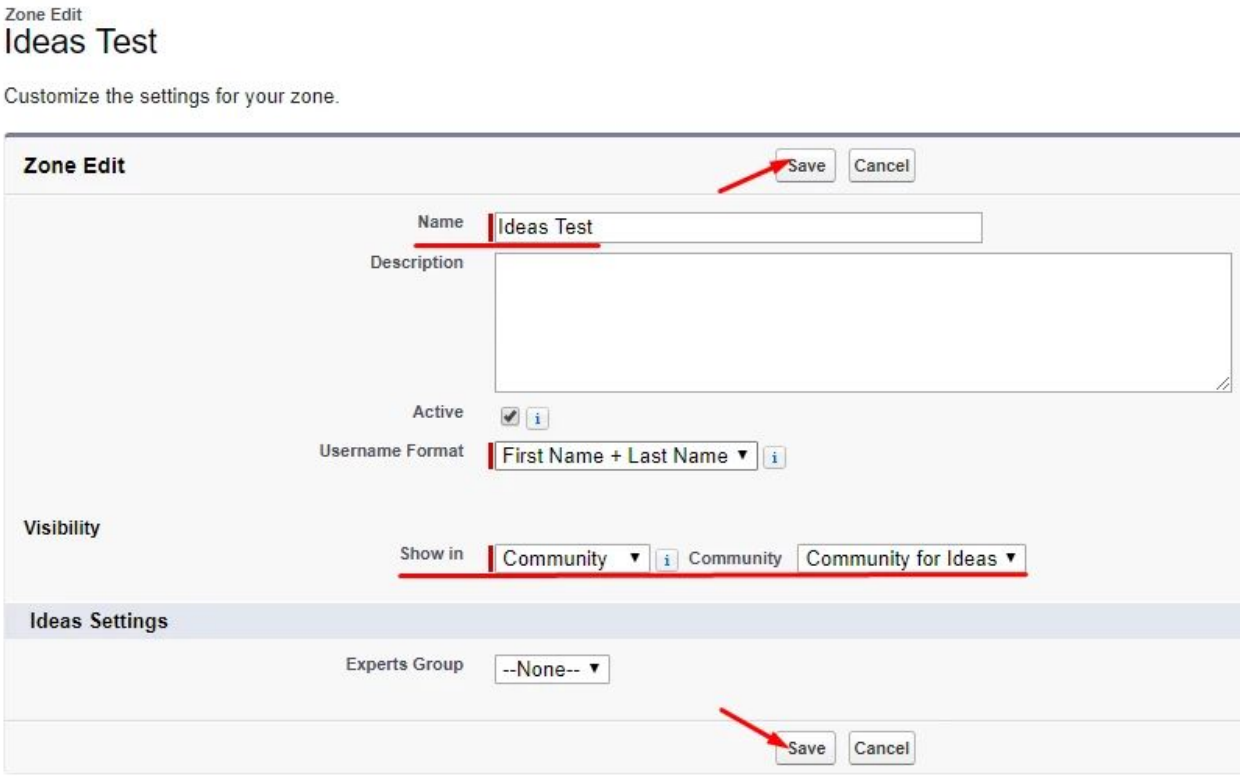


## Set up Ideas Categories and Statuses

To set up Ideas Categories and Statuses use Salesforce Classic Interface.

You can use Categories and Statuses for filtering the Ideas on the community.

**To create Ideas Categories, go to:**

1. Setup – Quick Find / Search – type Ideas - choose Fields – click Categories.
2. Categories Picklist Values – click New.
3. Add categories for your Ideas component (each category on a separate line) and choose an appropriate Zone.
4. Click Save.


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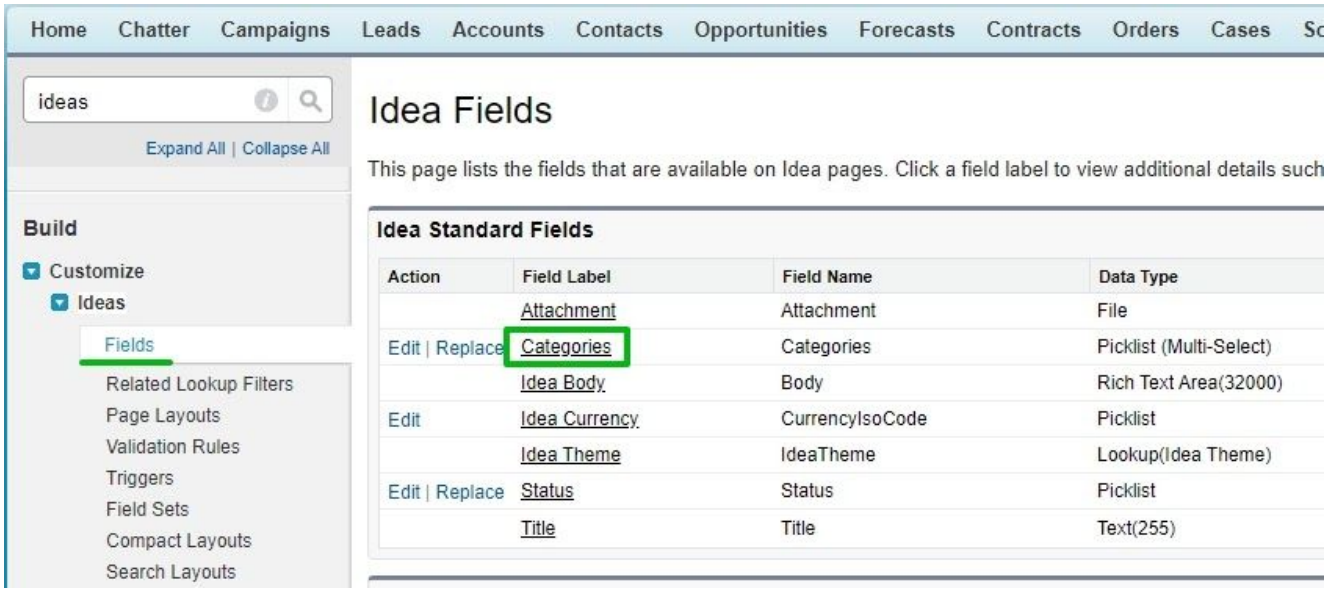
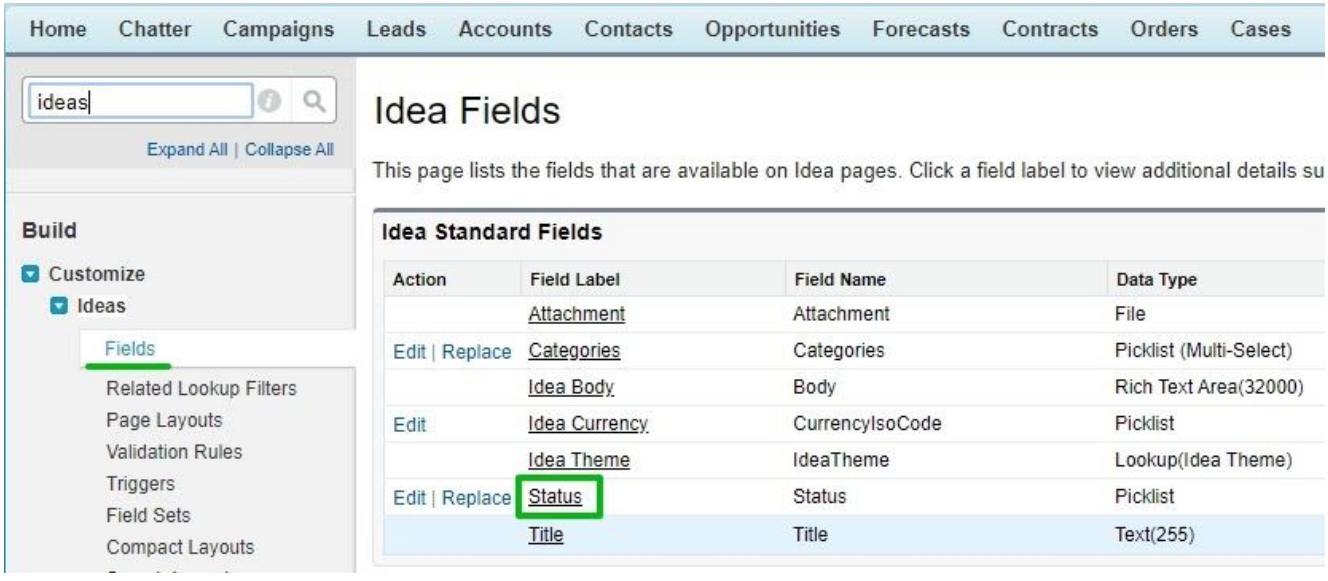



It is also possible to add statuses that will be assigned to ideas on the community.

**To add a Status, go to:**

1. Setup – Quick Find / Search – type Ideas - choose Fields – click Status.
2. Status Picklist Values – click New.
3. Add statuses for your Ideas component (each status on a separate line) and choose an appropriate Zone.
4. Click Save.





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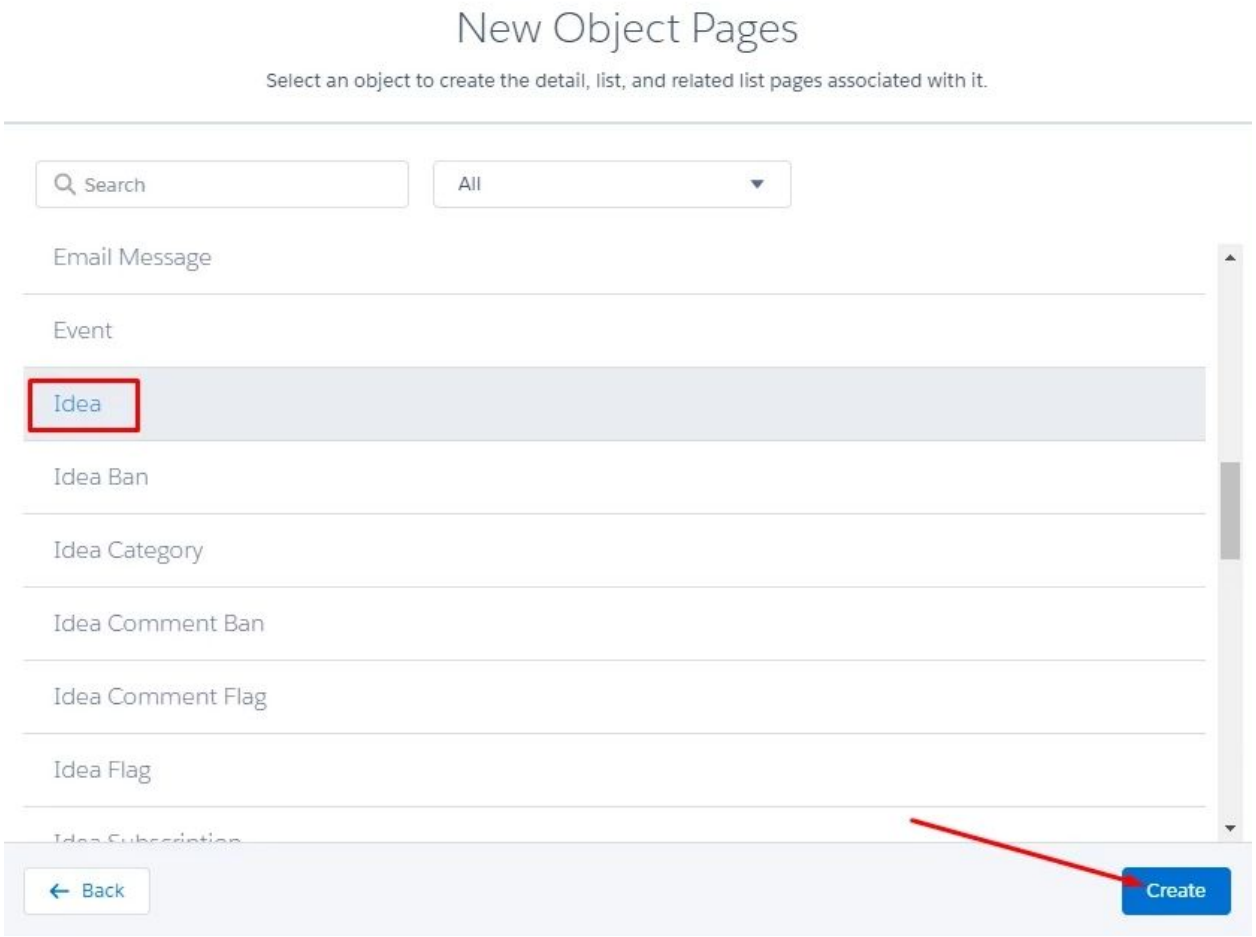
# COMMUNITY BUILDER

## Set up Community Pages

**Important:** you don't need to set up community pages for ideas if Idea object pages have been created previously.

**For using Ideas components within the community, you need to create Idea object pages (Idea List, Idea Detail). Follow the steps below to create them:**

1. Pages menu – New page – Object page.
2. Choose object Idea – Create – Publish your changes.





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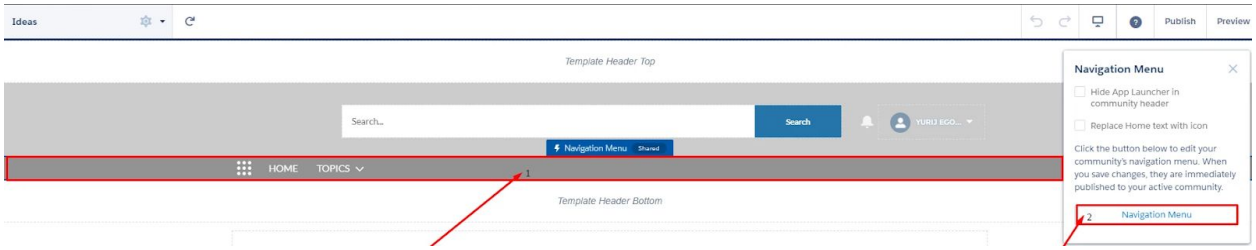
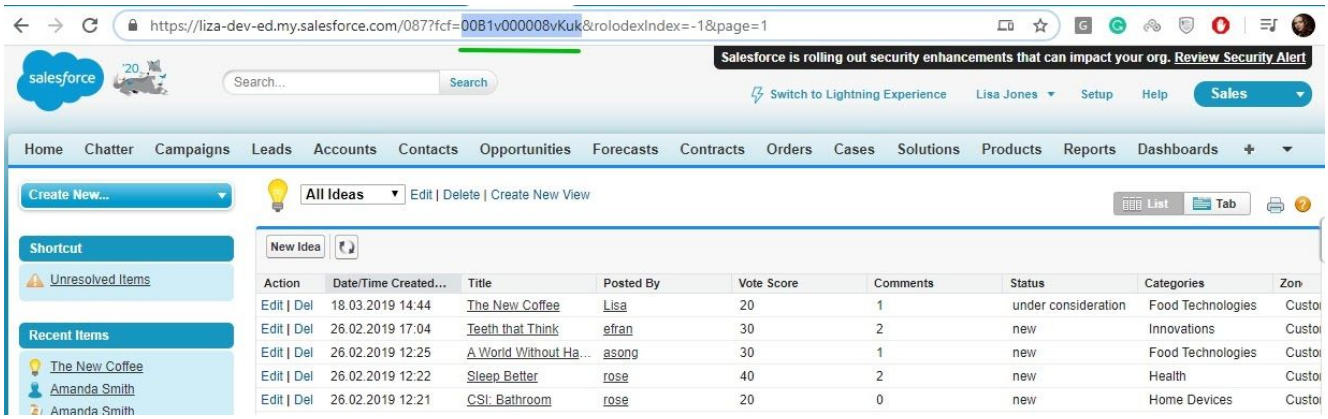
**To make the page available for community users, add it to the Navigation menu. Take the following steps to do this:**

1) Navigation Menu – Navigation Menu window.




2) Click "+ Add Menu Item" – Enter the Name; Type: Community Page; Page: Idea List.

3) Copy an appropriate list view ID on the standard (classic) Ideas tab address bar.




4) Past it into the Ideas Navigation page URL field using the following format:

**/idea/Idea/LIST_VIEW_ID**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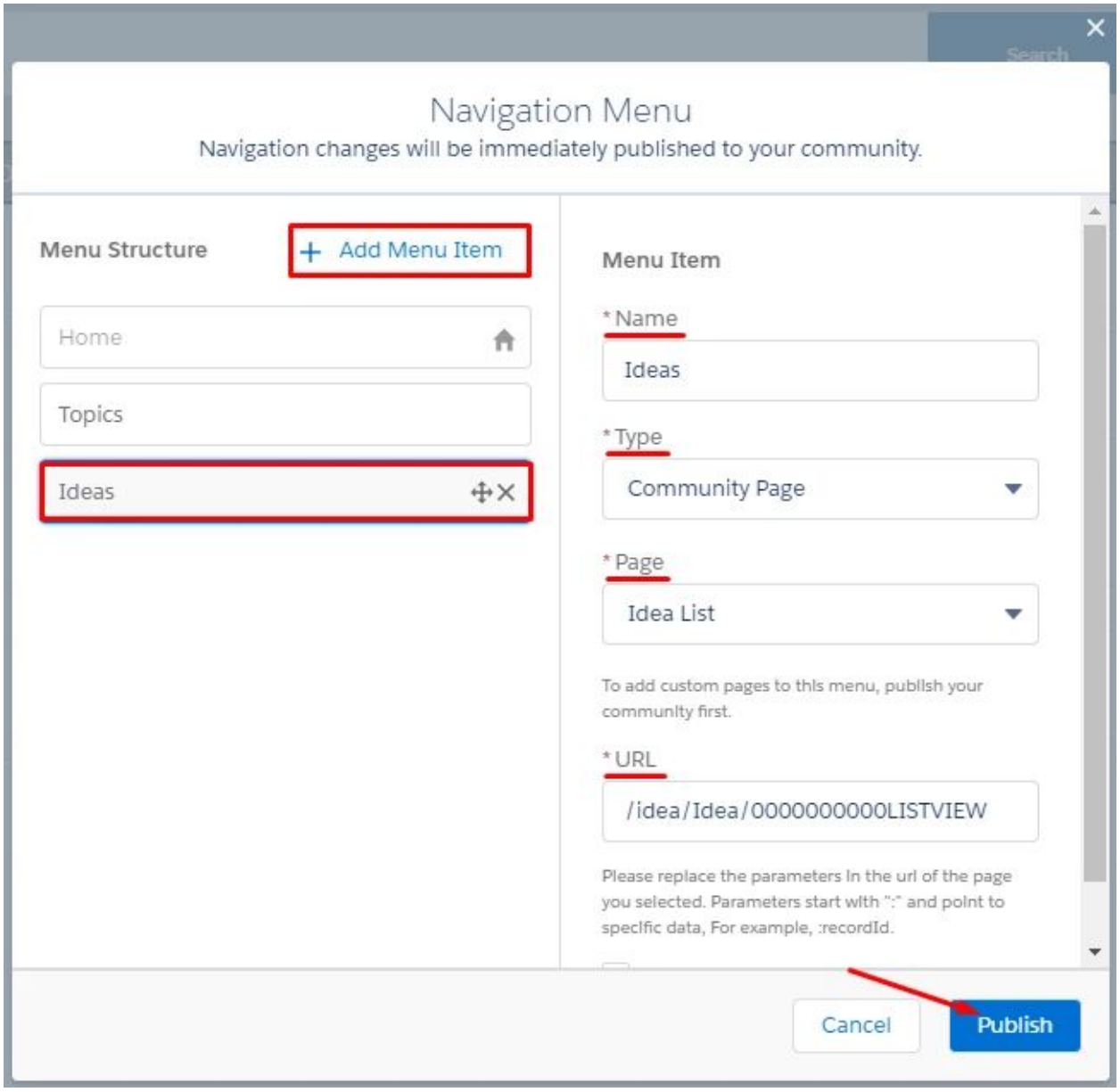


5) Publish your changes.

## AC Ideas List Component

This is used on the Ideas List page and displays a list of published ideas.

**Add a component to the page:**


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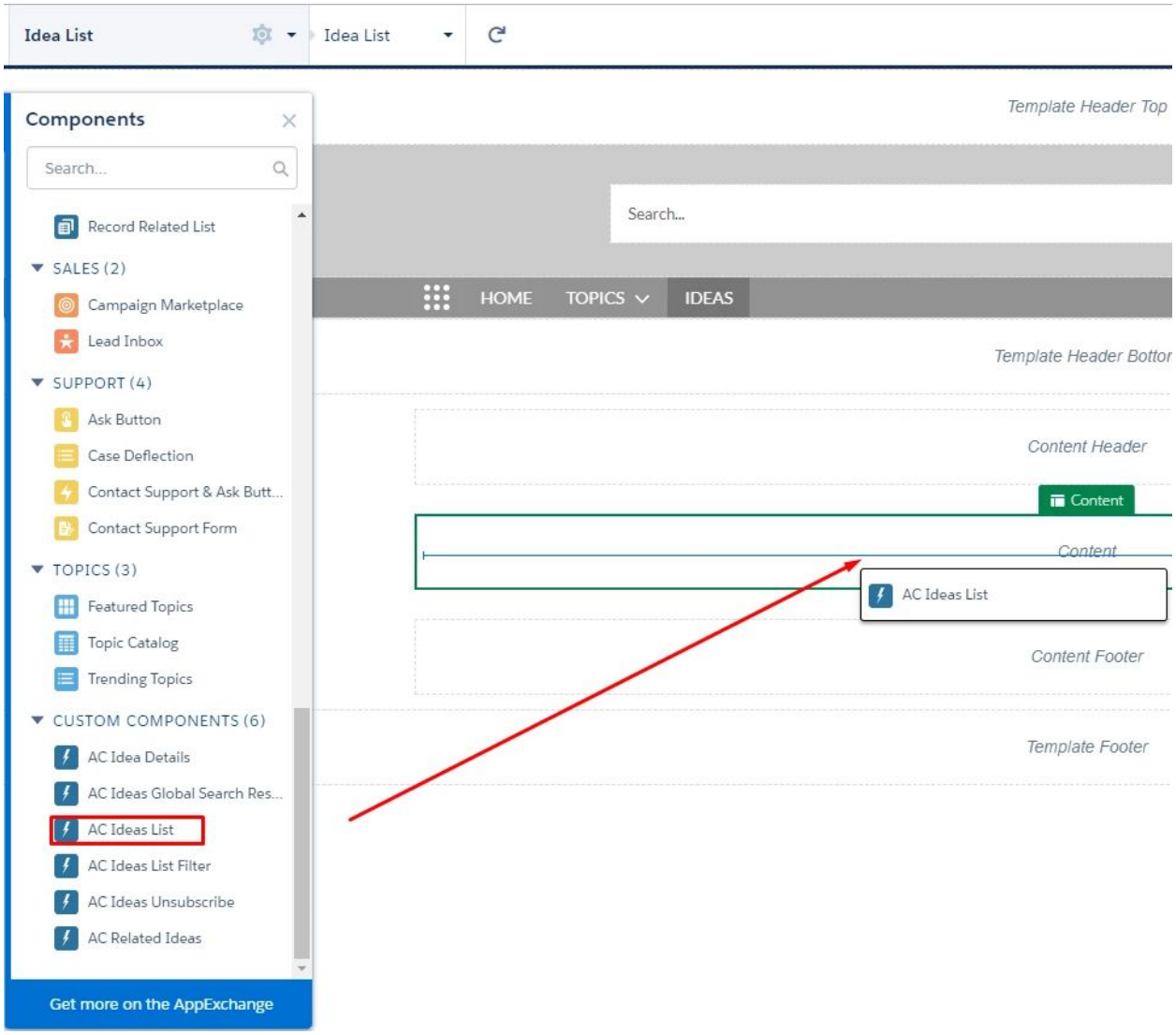
1. On the “Idea List” page, click on the components tab to find the **AC Ideas List** component in the drop-down list, and drag it to the page canvas.




2. Open the Properties box by clicking on the component. Here you can manage Ideas Zone Name, the number of items per page and the default order of ideas. Choose a full or compact style of the Ideas list. You can also enable the Search field. Publish your changes.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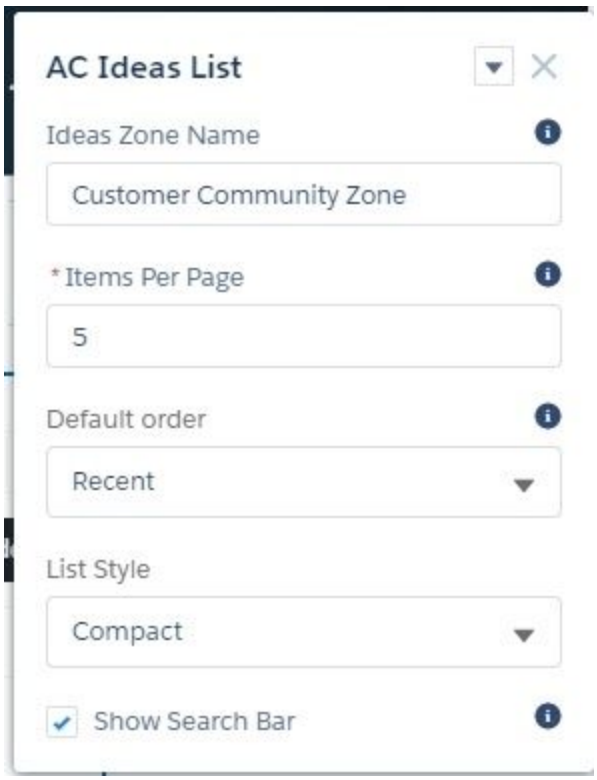


## AC Ideas List Filter Component

This serves to filter existing ideas by categories and statuses. It can be added to the sidebar on the **Idea List** page.

**Add a component to the page:**

1. On the "**Idea List"** page, click on the components tab to find the **AC Ideas List Filter** component in the drop-down list, and drag it to the page canvas.


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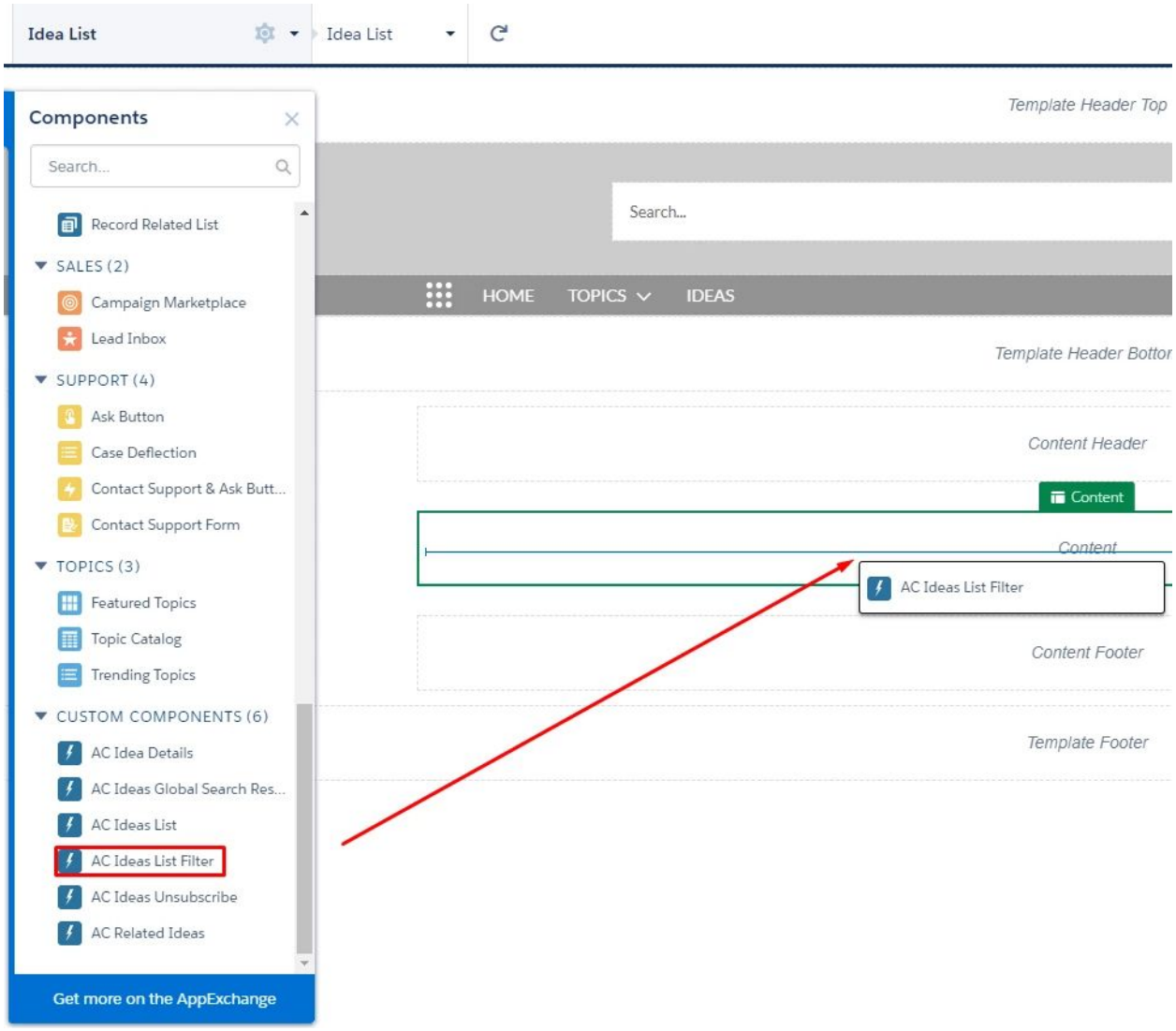


2. Open the Properties box by clicking on the component. Here you can manage Ideas Zone Name and default filter groups order. You can also make filter groups expanded. Publish your changes.

## AC Idea Details Component

### Add a component to the page:

On the "**Idea Detail**" page, click on the components tab to find the **AC Idea Details** component in the drop-down list, and drag it to the page canvas. Publish your changes.


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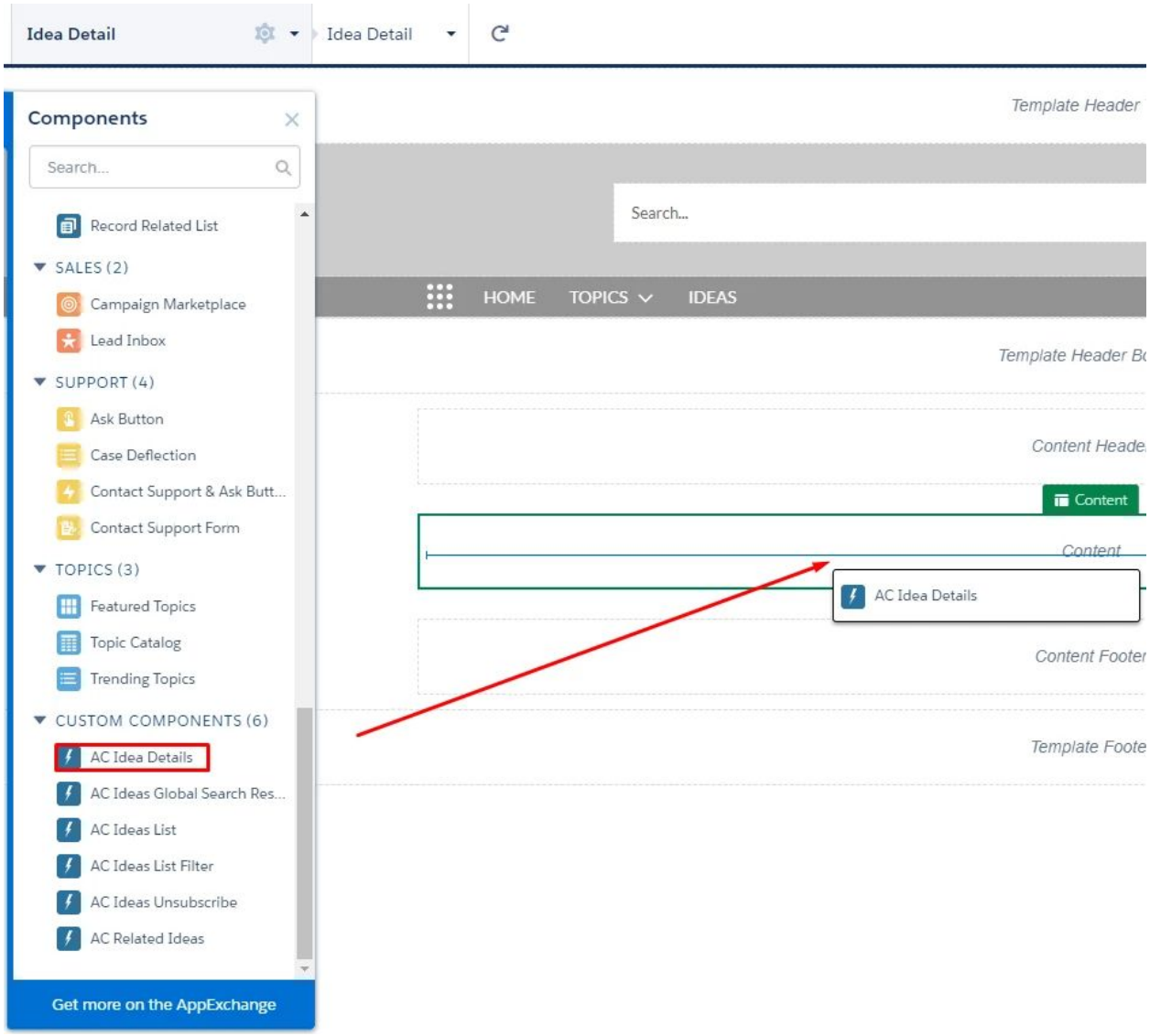


## AC Related Ideas Component

It displays a list of similar ideas on the detail page.

**Add a component to the page:**

On the "**Idea Detail**" page, click on the components tab to find the **AC Related Ideas** component in the drop-down list, and drag it to the page canvas. Publish your changes.


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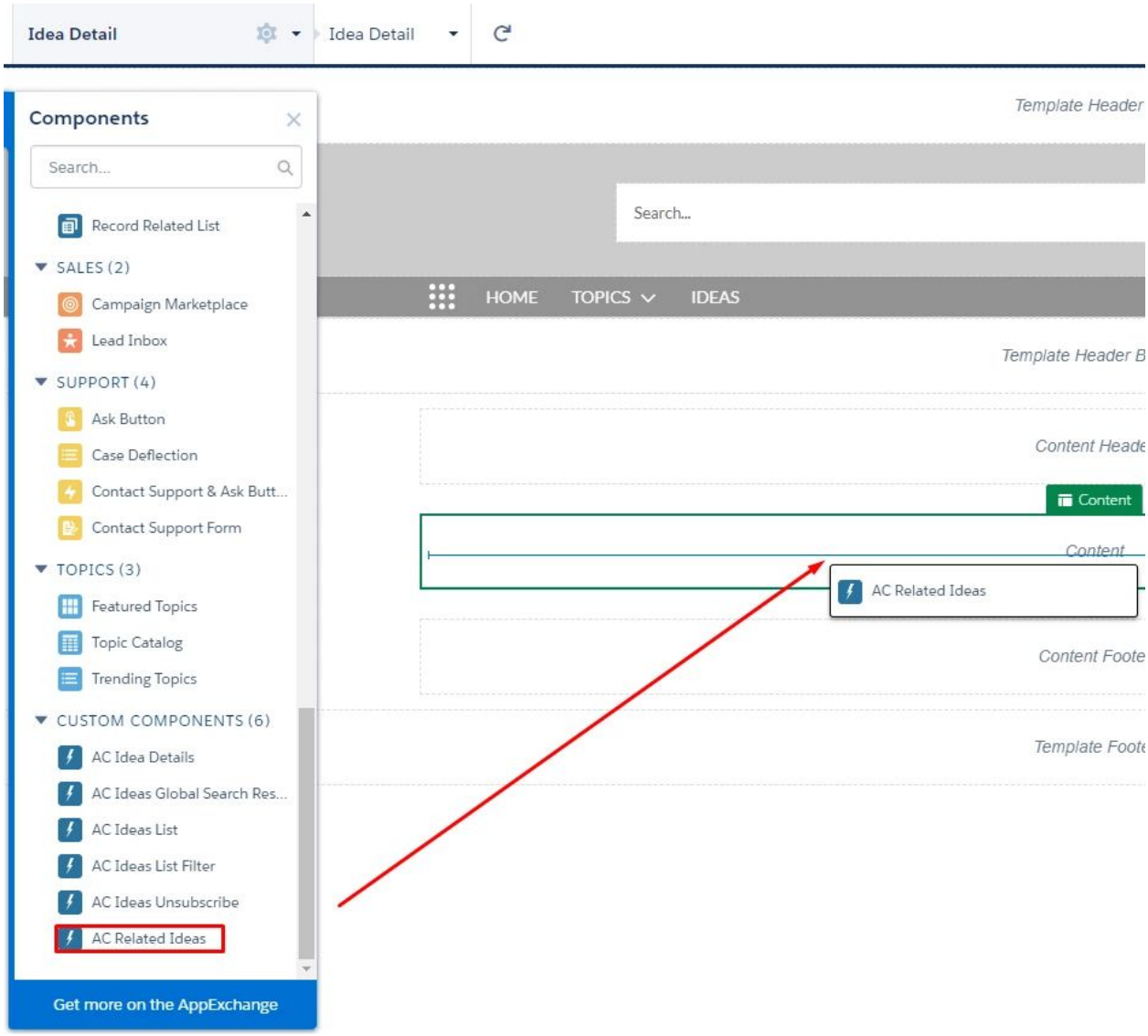


## AC Ideas Global Search Result Component

This helps users searching for Ideas across the community. It has to be added to the standard **Search** page.

### Add a component to the Search page:


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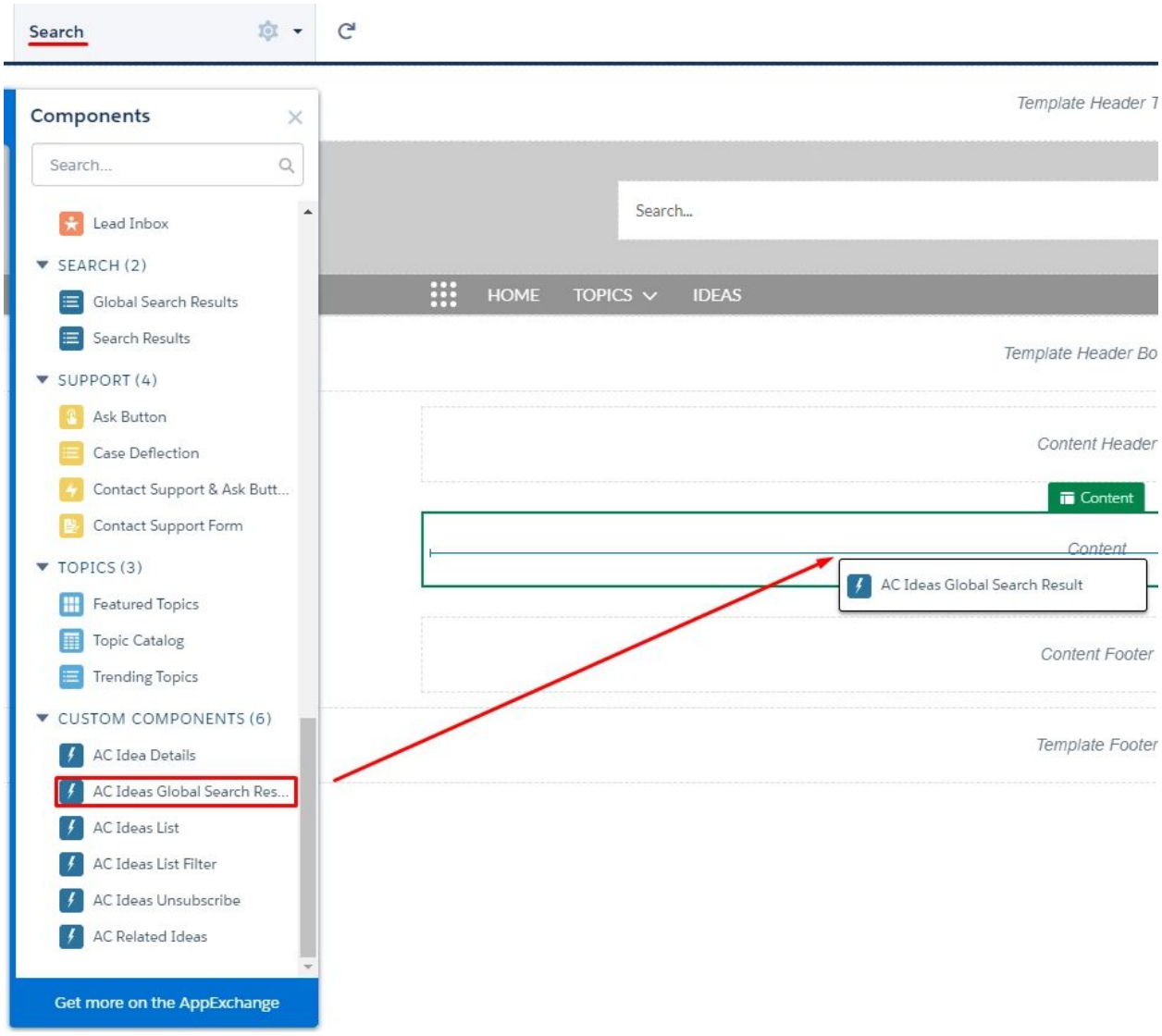
1. On the **Search** page, click on the components tab to find the **AC Ideas Global Search Result** component in the drop-down list, and drag it to the page canvas.




2. Open the Properties box by clicking on the component. Here you can manage Ideas Zone Name, the default order of ideas, the number of items per page and the search string. Publish your changes.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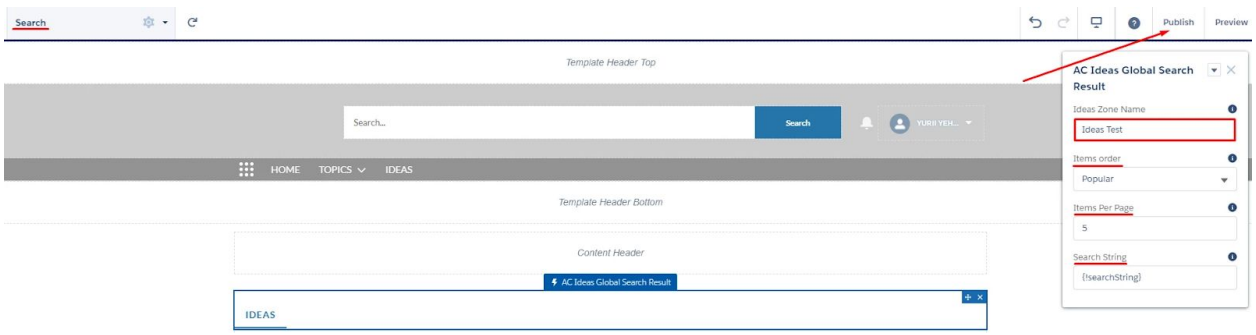


## AC Ideas Unsubscribe Component

AC Ideas Unsubscribe component is used to unsubscribe from one or all ideas at once by clicking on the link in the email.

1. **Add a component to the page:**

Create a standard page in the community builder. Click on the components tab to find the **AC Ideas Unsubscribe** component in the drop-down list, and drag it to the page canvas.


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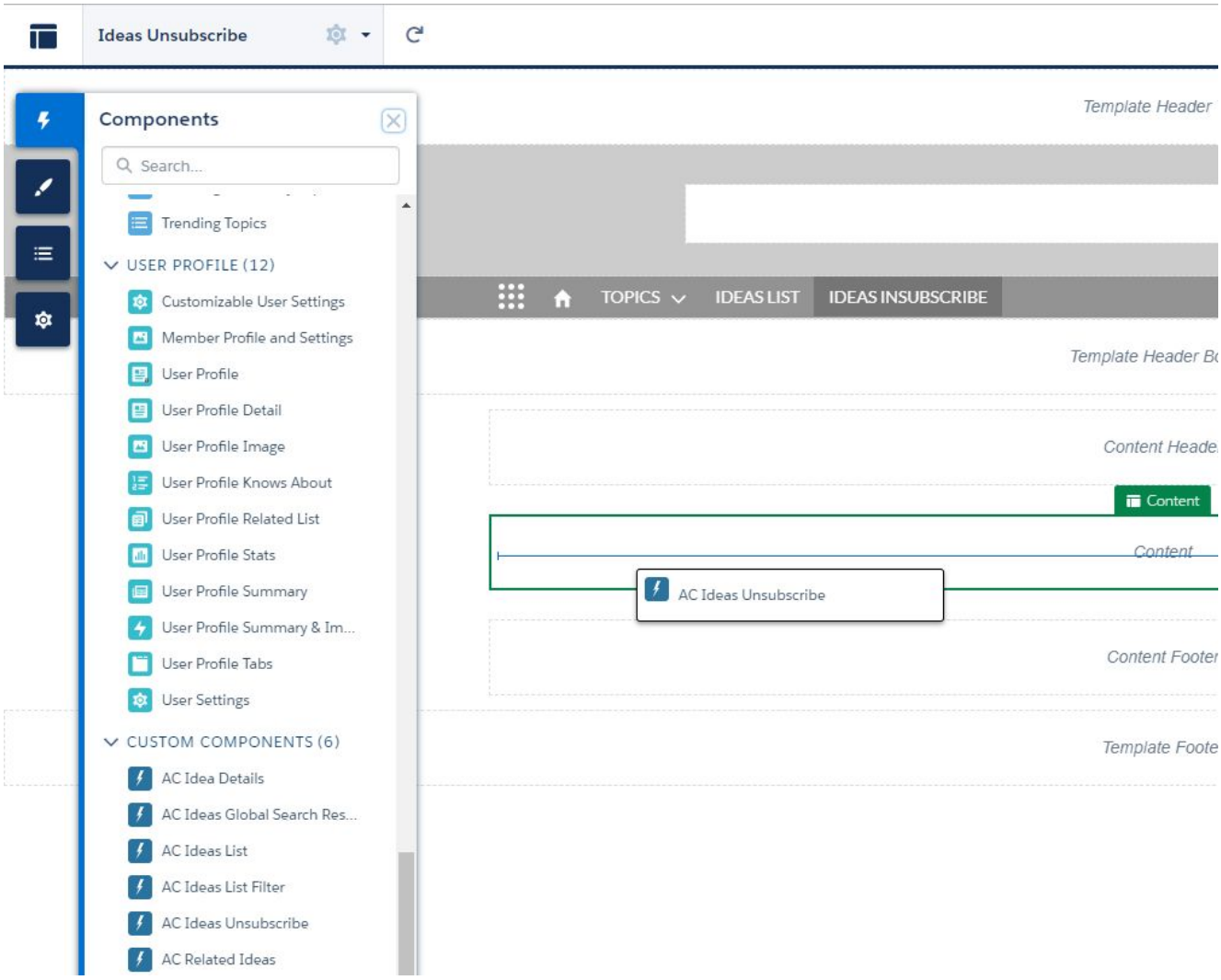


The component has no properties in the community builder.

2. **Update email templates for Ideas Enterprise in the organization**

Go to the Organization Setup - Classic Email Templates - AC Ideas Enterprise folder.

Update the following email templates for subscribers:

- IdeaOfficialAnswerChangeToSubscriber
- IdeaStatusChangeToSubscriber


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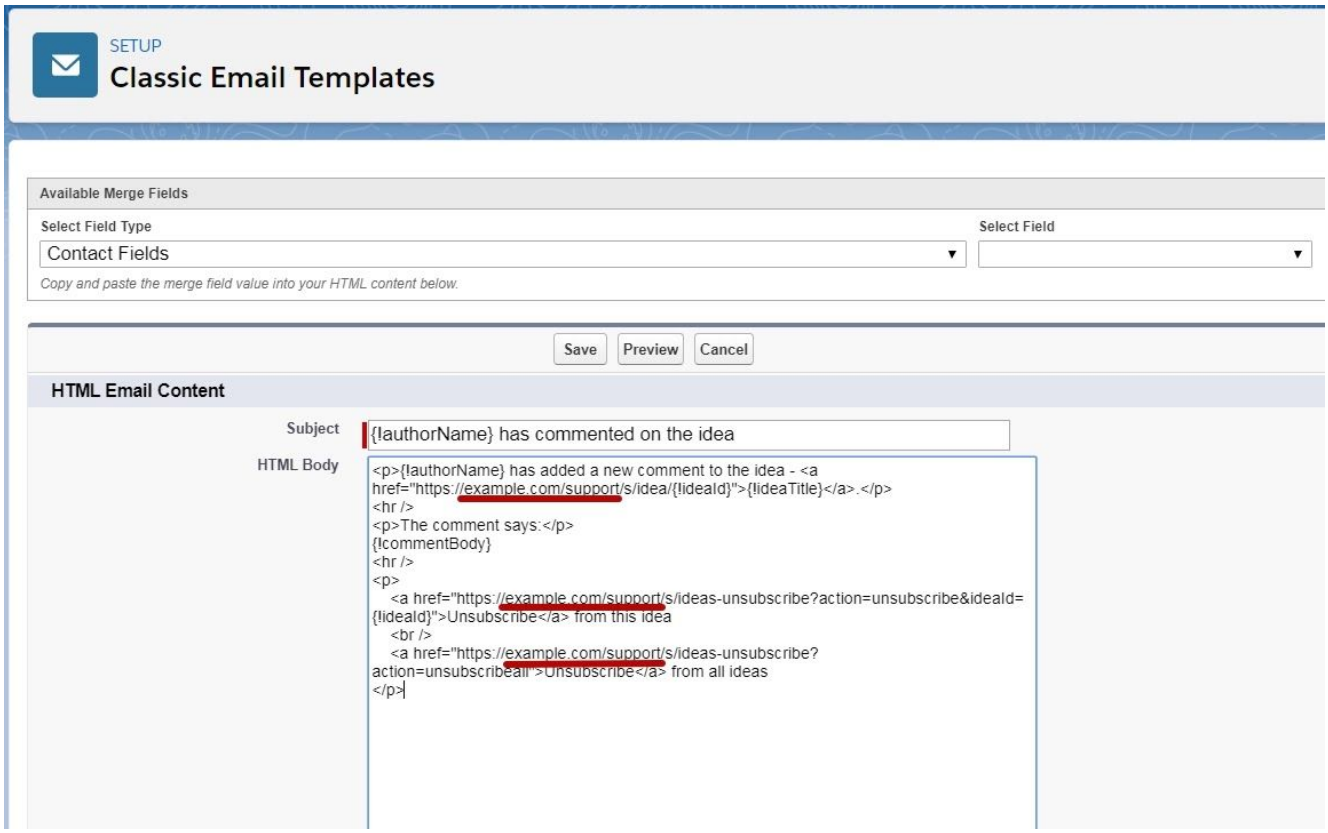
- NewCommentNotificationToSubscriber

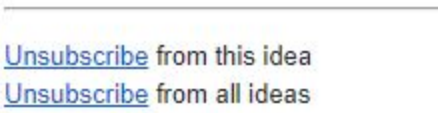
Open the template and edit HTML Version. The Text Version can be copied from the HTML one.

Replace the example.com/support in the template body with the community URL.




Read also the **Configuration** section.

Community users will be able to unsubscribe the specific idea or all ideas at once when getting an email notification.





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After clicking one of the links, the user will be redirected to the community page.

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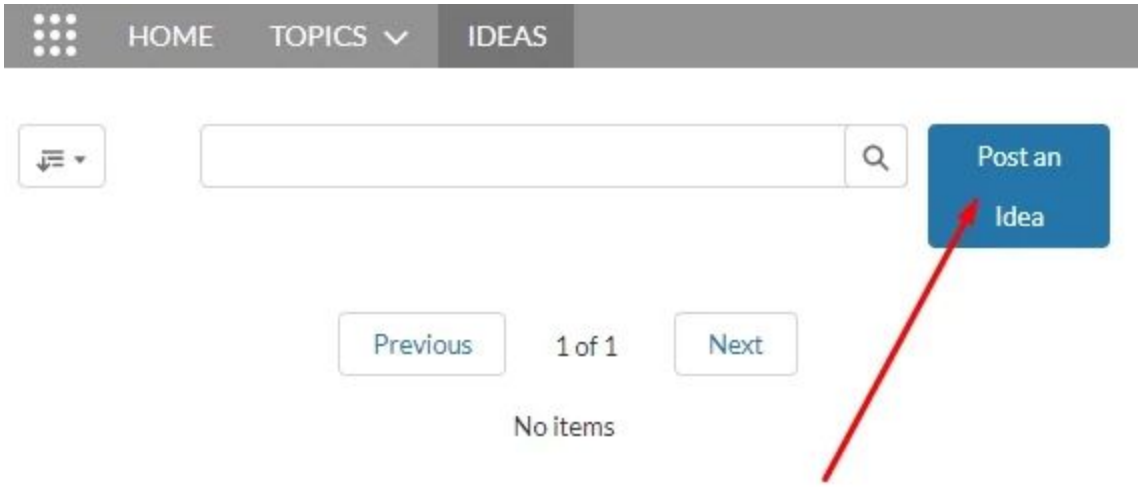
# FEATURES DESCRIPTION

## Create an Idea on the Community

To create Ideas just from the Community you have to log in as a user.

**Create an Idea:**

1. Click the "Post an Idea" button on the Idea page.




2. Fill the required fields in the pop-up window: Title, Category, and Description.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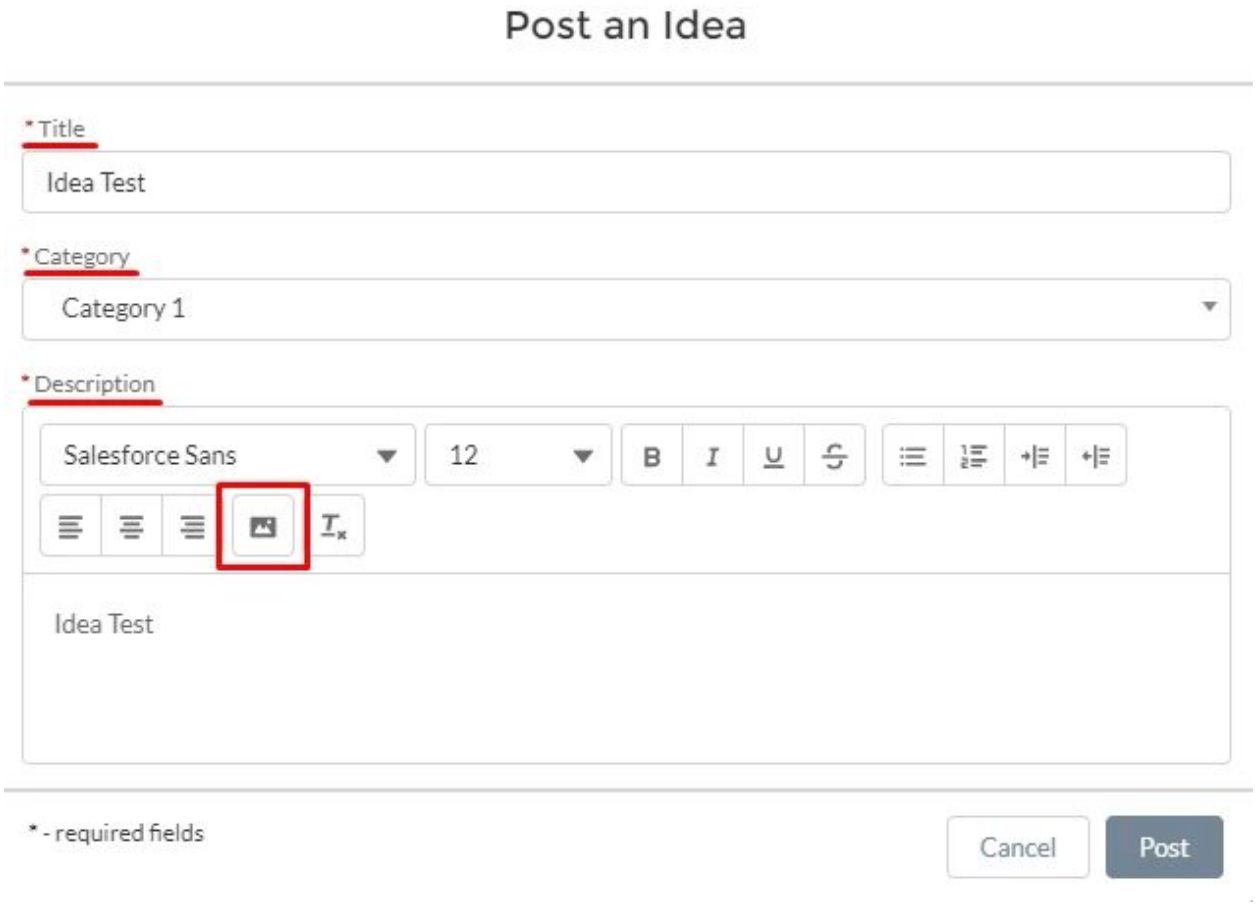


You can also add attachments to the idea within the “Upload Files” button. To add attachments to an existing idea, click “Edit” next to the Idea and then upload files.


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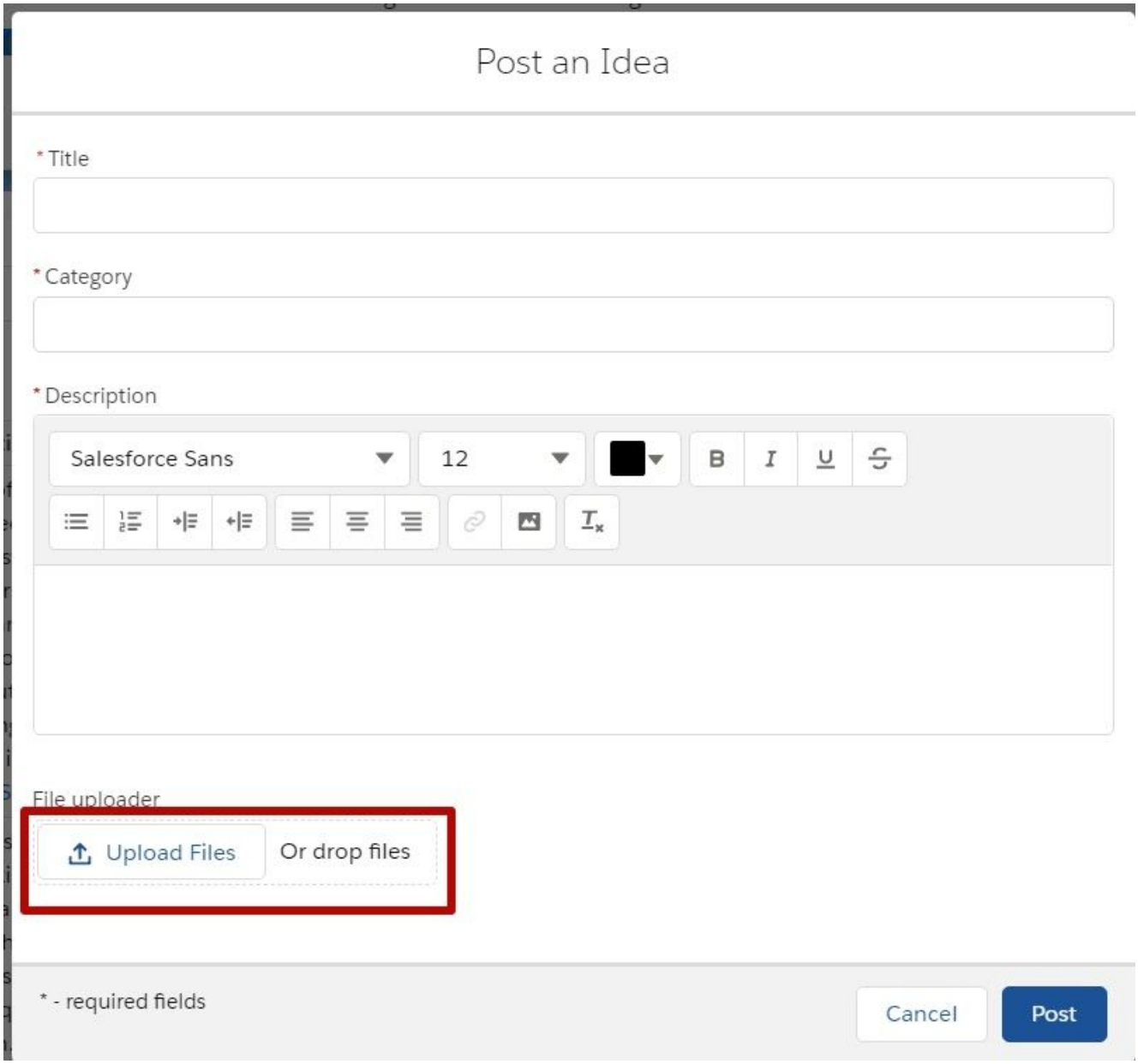



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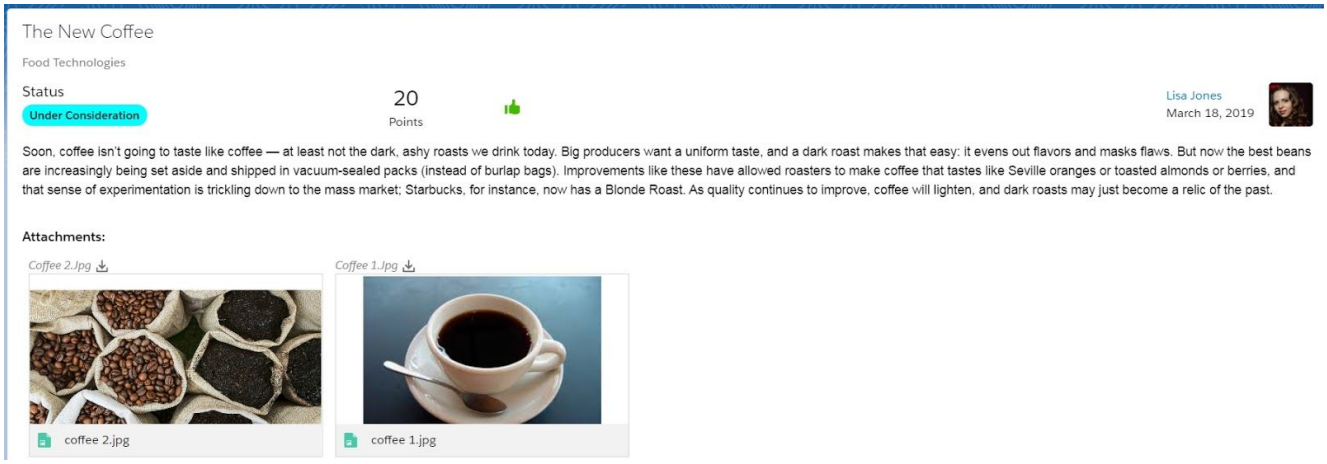
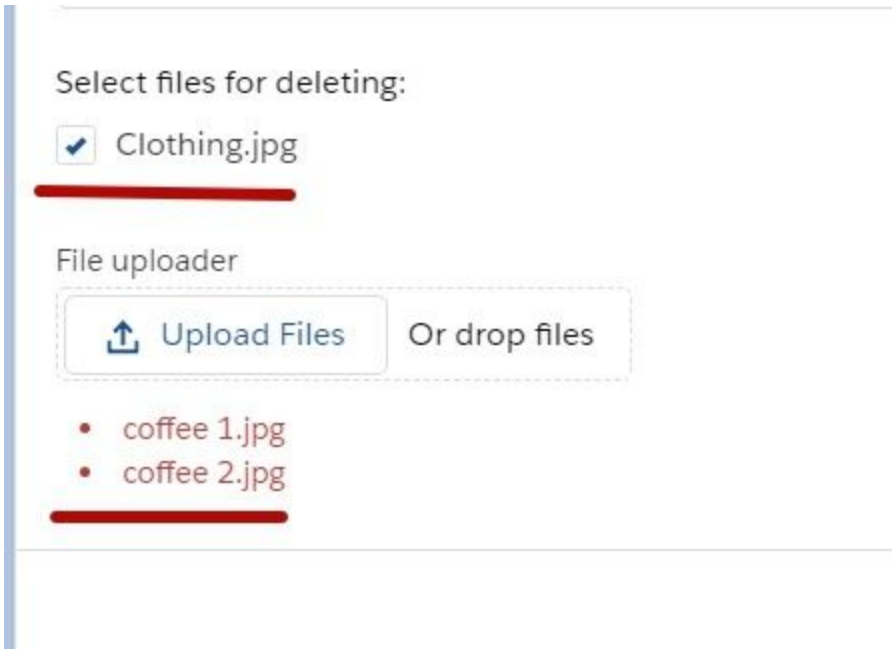



You can also delete and update adding files. Edit the Idea, to delete enable the checkboxes near existing files and upload new ones. Save your changes.




## Comment on Idea

Idea's Discussion is also available on the Community Detail Page. Each user who has access can comment on the Idea.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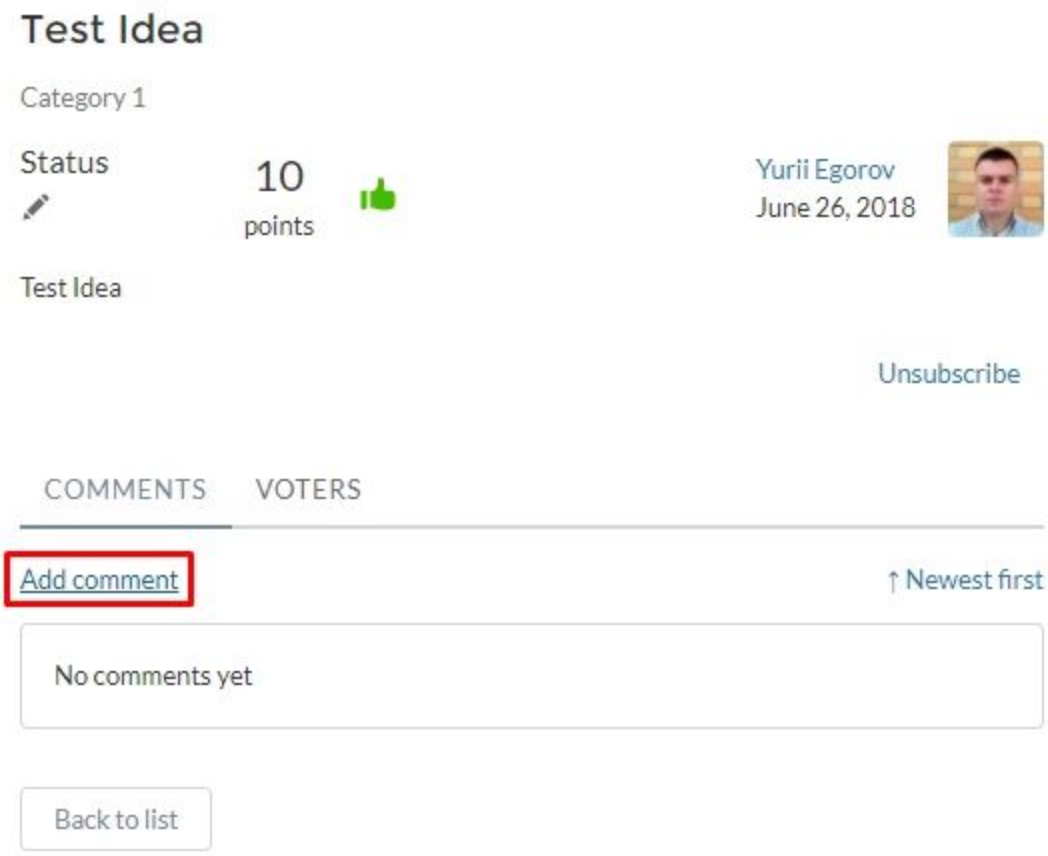


**Note!** The comment can be edited or deleted only up to 10 minutes after posting. After 10 minutes, the comment can no longer be modified.

You can also disable the ability to comment on Ideas by clicking on the "Disable comments" checkbox in the Zone Settings (*Lightning Experience – AC Enterprise Ideas App – Ideas Settings tab – Zone Settings subtab*) and saving this change for a certain zone.

## Change Idea's Status

When you change the status of the Idea, the moderators and subscribers will receive notification of this event.

You can change Idea's Status using one of the following ways:

1. Use the "Status Auto Update" function (*Lightning Experience – AC Enterprise Ideas App – Ideas Settings tab – Common Settings subtab*). Status Auto-Update

is useful to define some vote threshold to change from “New” to “Under consideration” status to mark that a certain Idea reached vote threshold and was automatically moved to “Under consideration” status. All other status changes should be done manually by the admin team.

2. Change status manually in the Salesforce Classic interface by adding the “Status” field to the Idea Page Layout, because it is not available by default.

3. On the Community, you can edit status both on the Idea list and on the Idea Detail page. Click on the “pencil” button, select a new status from the drop-down list, and Save. This feature is available for the System Administrator license only.

***List View***

***Detail view***

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## Archiving Ideas

The ideas which are old or declined can be archived. In order to move an idea to the archive, enable the correspondent checkbox on the Idea edit view within the Classic UI. Those ideas will not be displayed in the community ideas list.

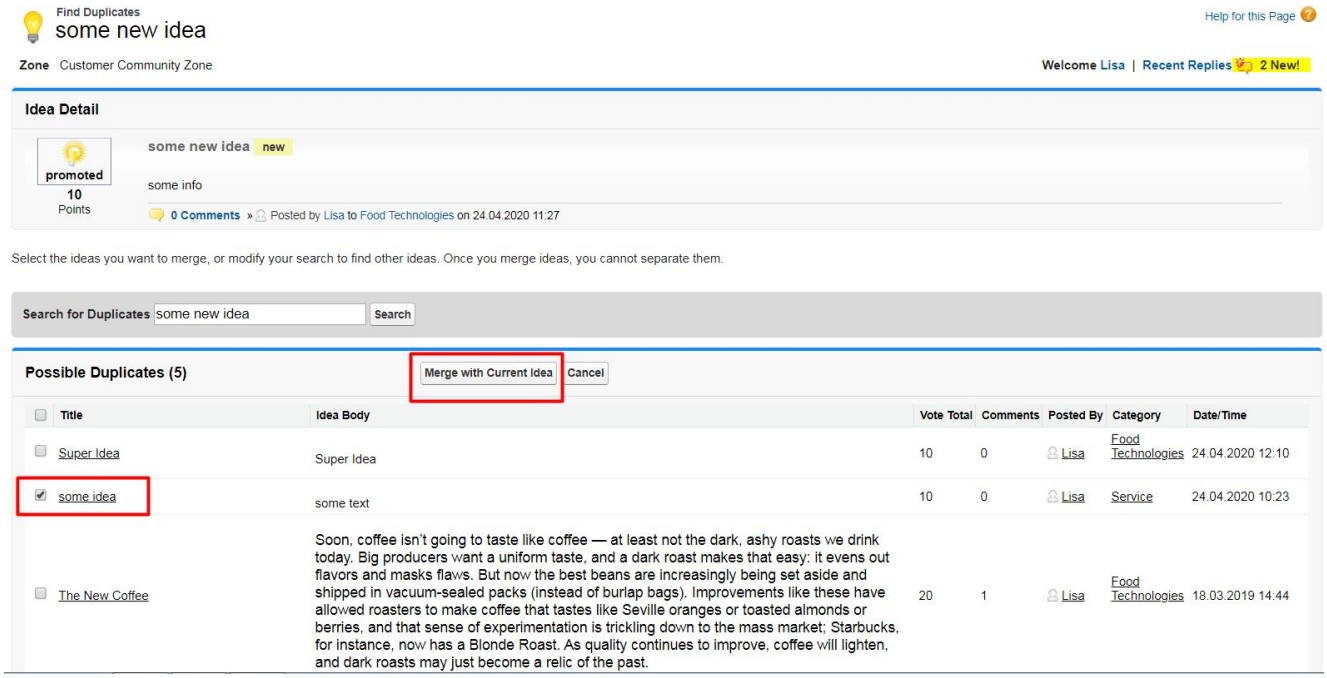
***Note**: if you don't see the 'Archived' checkbox on the Idea page, then you have to add this field to the Idea page layout in Setup.*

## Merging Ideas

To merge ideas use Salesforce Classic Interface.

To search for duplicate ideas and merge, do the following:

1) On the Ideas tab, click the title of an idea that you want to merge.
2) On the idea's detail page, click the Find Duplicates. Salesforce searches all the ideas within the zone and displays the five ideas with titles that most closely match the current idea's title. If the Possible Duplicates list does not contain any ideas that you want to merge, enter keywords in the Search for Duplicates field and click Search.




3) Select the ideas that you want to merge. Click Merge with Current Idea and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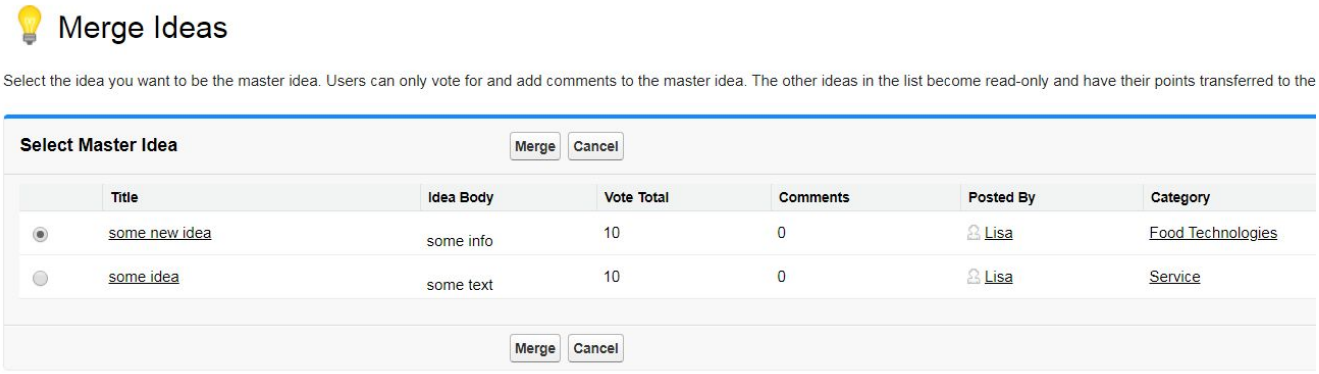
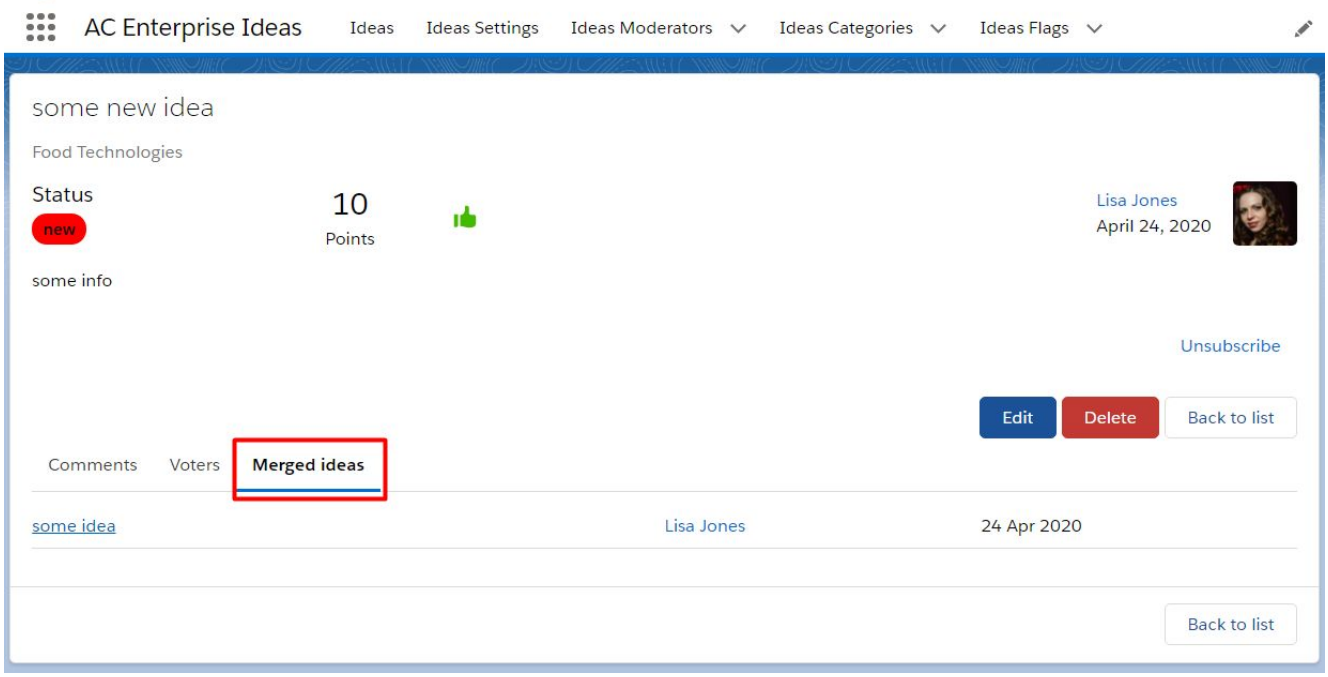
select the idea that you want to be the master idea, and click Merge.




The result of merging ideas will be visible on the lightning interface and on the community.





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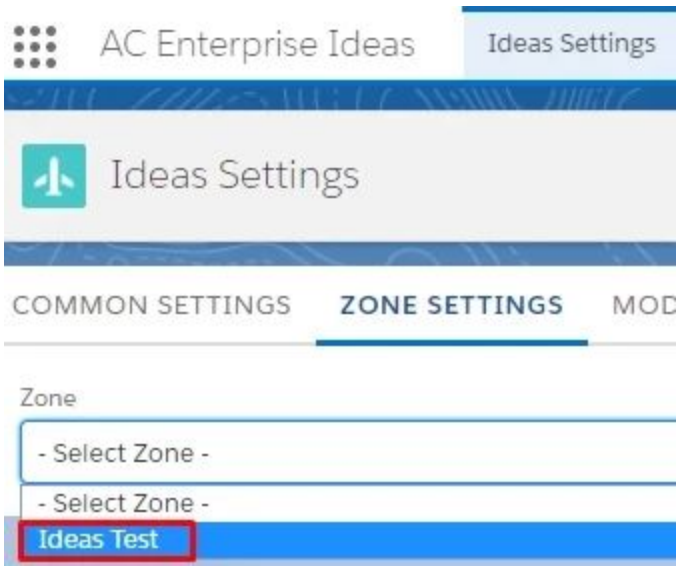
# ADDITIONAL CONFIGURATION

AC Enterprise Ideas is available for configuration in Lightning Experience only!

Choose the AC Enterprise Ideas App from the drop-down list of apps in the App Menu/App Launcher.

Three main tabs cover different areas of Ideas management and configuration: Ideas Settings, Ideas Moderators, Ideas Categories.

**Note**: Before making any changes, we recommend that you select the appropriate zone for which the settings will be applied.




## Ideas Settings

Ideas Settings tab includes three main sections of settings: Common Settings, Zone Settings, Moderation Settings.

1. **General Settings**

The Ideas Display section is used in case you want some additional custom fields to be displayed when creating an idea. Copy an API name of the created custom field set and paste it to this section.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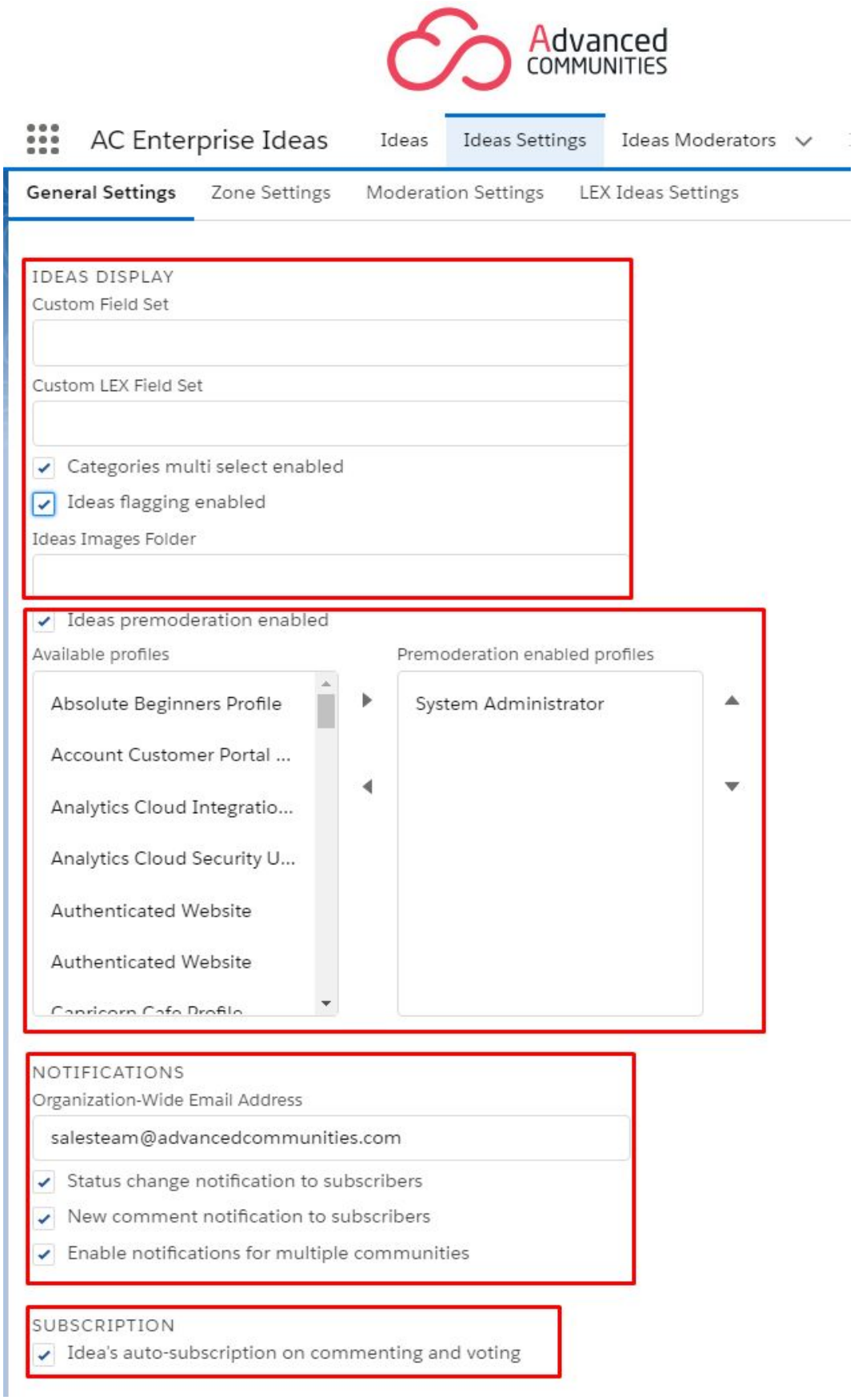



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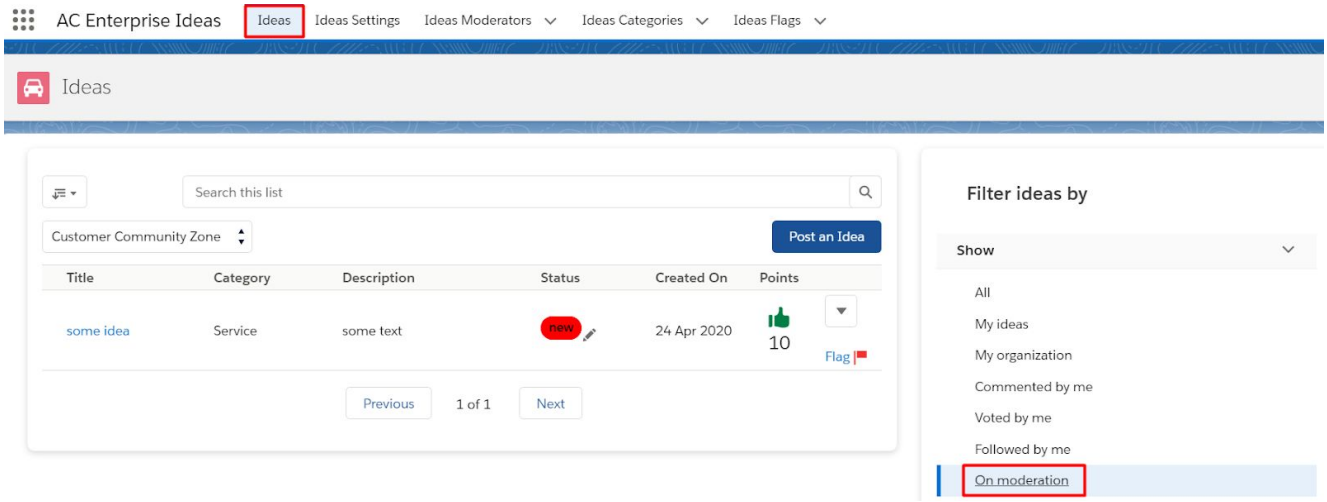
**Note:** See how to create Custom Fields and Field Sets in the Custom Field Settings section.

Here you can also enable/disable multiple choice of categories and ideas' flagging.

Enable Ideas Premoderation to save created ideas as a draft and select profiles for which ideas on moderation will be not visible.

The draft ideas will be visible within the "on moderation" section of the ideas list in your environment.




To make the idea publicly available, edit the idea and uncheck the "Idea on moderation" checkbox.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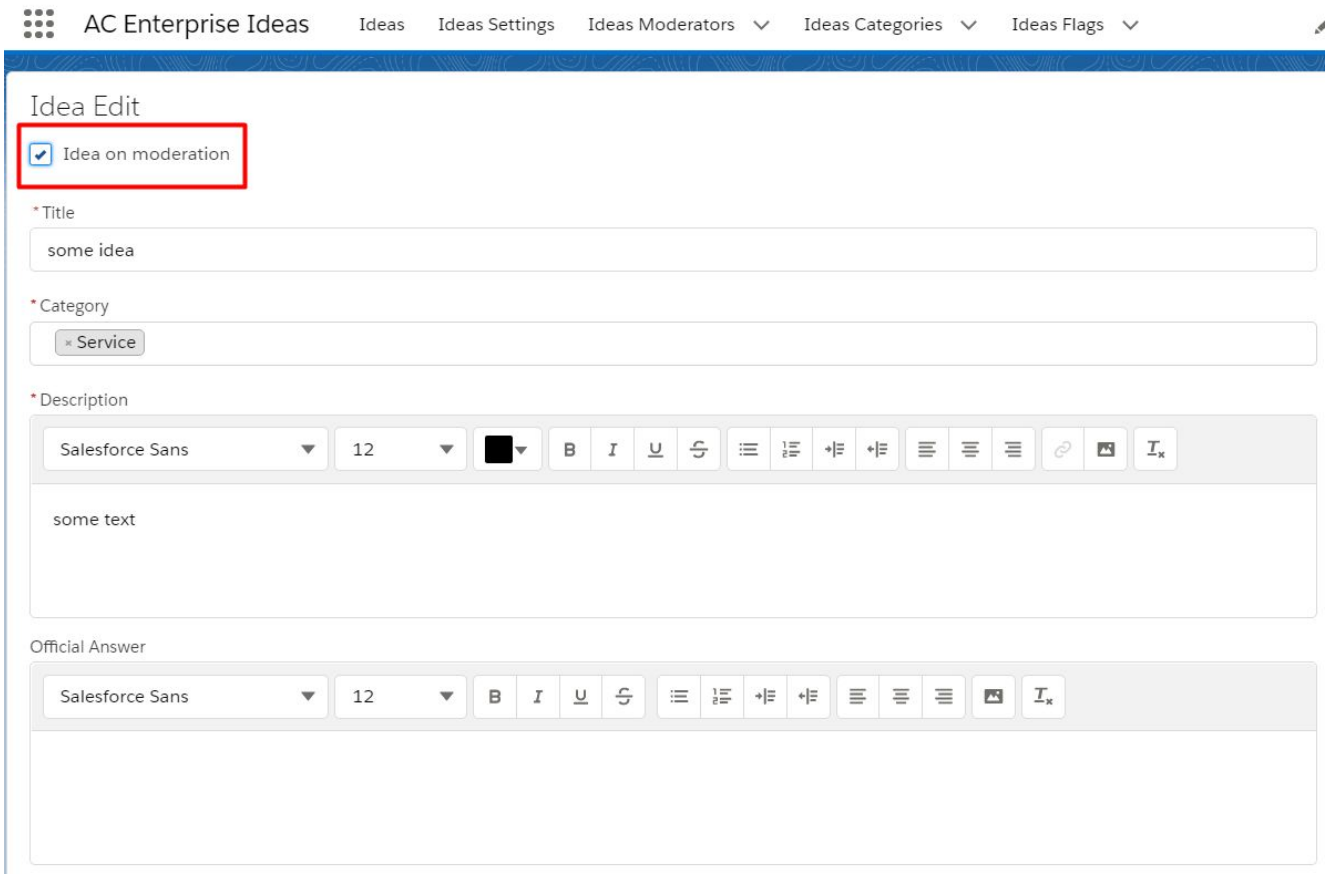


Notifications section defines Organization-Wide Email Address, from which subscribers will be notified. If Organization-Wide Email Address is empty then the system will use a comment author as a sender.

To configure Org-Wide Email, go to Setup – Organization-Wide Email Addresses – create and copy the email address you want to be used as a sender – paste it to the appropriate field in the Ideas Settings – Common – Notification section.

Using this section, you can also enable/disable subscriber's notifications about ideas status update and new comments.

If you have multiple communities using Ideas, enable notifications for multiple communities and set up email templates according to instructions in the Configuration section.


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Subscription. Enable **Idea's auto-subscription on commenting and voting**. By enabling this feature, users will be automatically subscribed to ideas on which they voted or commented.

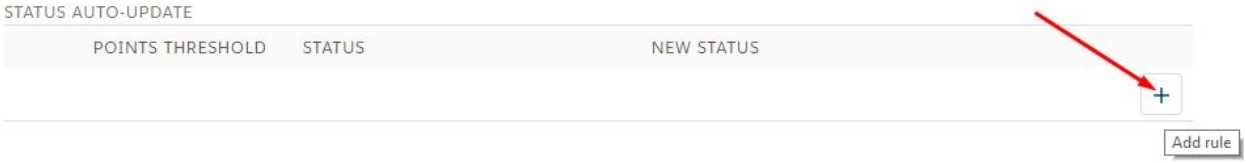
Statuses Colors. In order for Ideas to be clearly distinguished by its status, you can assign a color to the Status field.
Fill in the fields for statuses with HTML Color Codes (HEX codes).

***Note**: The setting applies to all zones; you cannot apply different colors with the same status name.*

Status Auto-Update section is used to filter out the most popular ideas by status. You can create rules for the automatic update status. When the number of reputation points reaches the specified mark in the rule, the status will be updated to the other value specified in the rule.

**To create auto-update status rules, do the following steps:**

1. Go to the App launcher – choose AC Experience Ideas – Ideas Settings – Common Settings – Status auto-update item – click "+ New rule" button.




2. Fill in the fields:
    1) In the required field “POINTS THRESHOLD” enter an integer (eg 20)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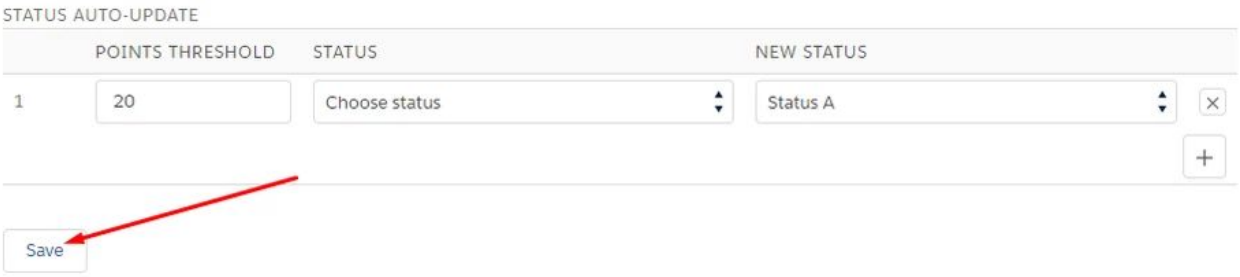
2) The Status field is not a mandatory value; if the intended Idea has not previously been assigned a status, then the field has to be left without a selected value.
   *There's an exception if it only applies the rule to the Idea with the previously assigned status.*
3) In the drop-down list of the mandatory "New status" field, select the intended status name for the change. Click Save.




You can delete / edit rules. The maximum number of rules created is 5. The created rules, without selecting zones, are applied to all zones without exception.

## 2. Zone Settings

Zone Settings allow you to configure some component's features or idea's behavior for certain zones individually.

Before editing any options for a specific zone you have to select the zone from the drop-down list for which the settings will be applied.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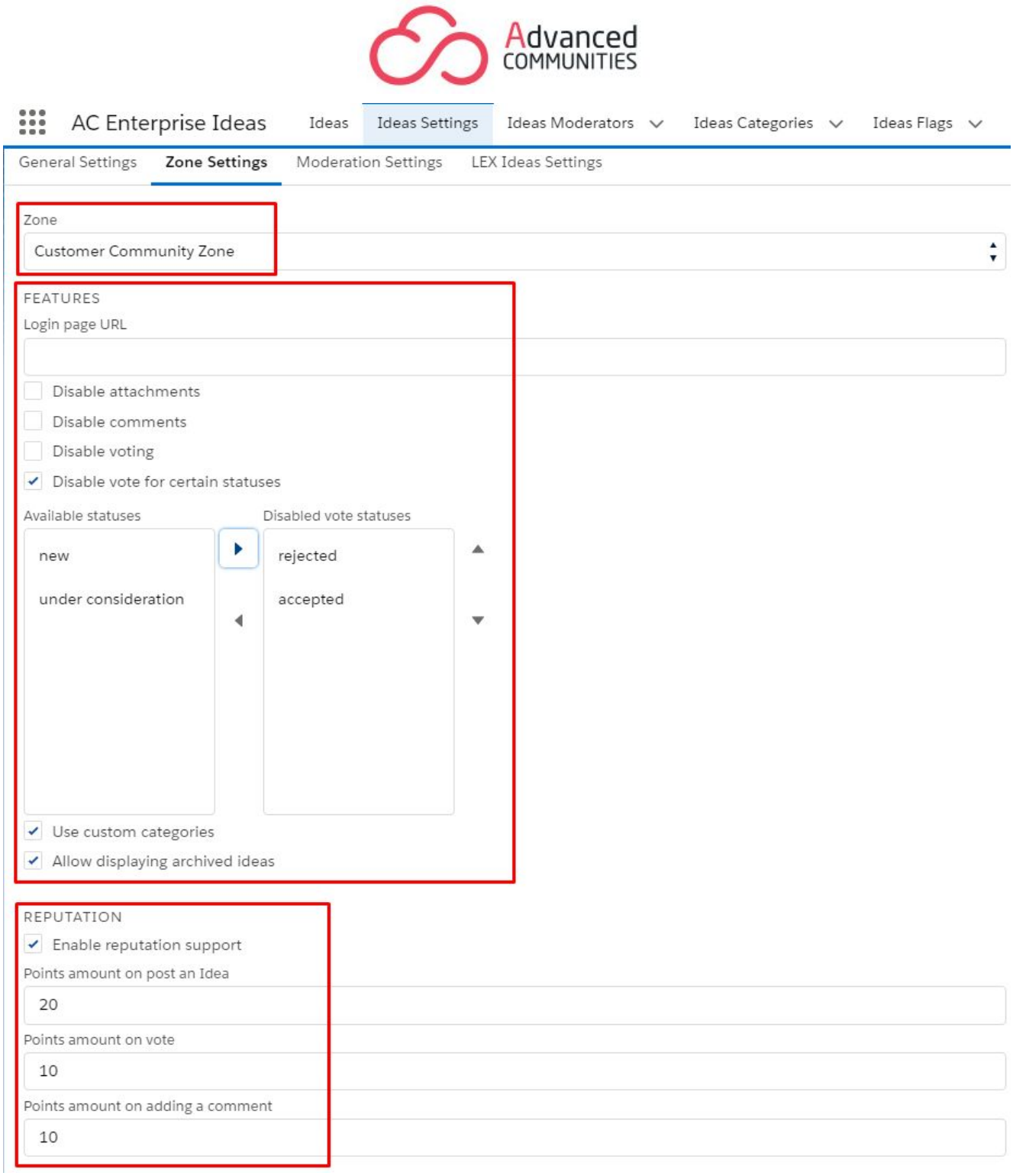


## Features

**Login page URL** - the URL of the login page in your Community
**Disable attachments** - disable the ability to attach file and images to ideas


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**Disable comments** - hide all previous comments and disable the ability to add comments for all users
**Disable voting** - disable the ability to add votes for all users
**Disable voting for certain statuses -** when the idea reaches the status for which it requires no more votes (e.g. *rejected* and *accepted*), enable "Disable voting for certain statuses" checkbox. Then select the statuses from the available for which you need to block/stop voting
**Use custom categories** - switch to custom categories instead of standard pick-list ideas categories
**Allow displaying archived ideas** - makes possible for users to see ideas that were marked as archived

Reputation

You can enable Community member's reputation support for ideas.

A community user's reputation can be configured by setting reputation rewards for three main Ideas actions, which are: "post an idea", "post a comment" and "make a vote".

### 3. Moderation settings

Moderation Subtab shows the list of moderators and the list of forbidden words and expressions in Community Ideas.


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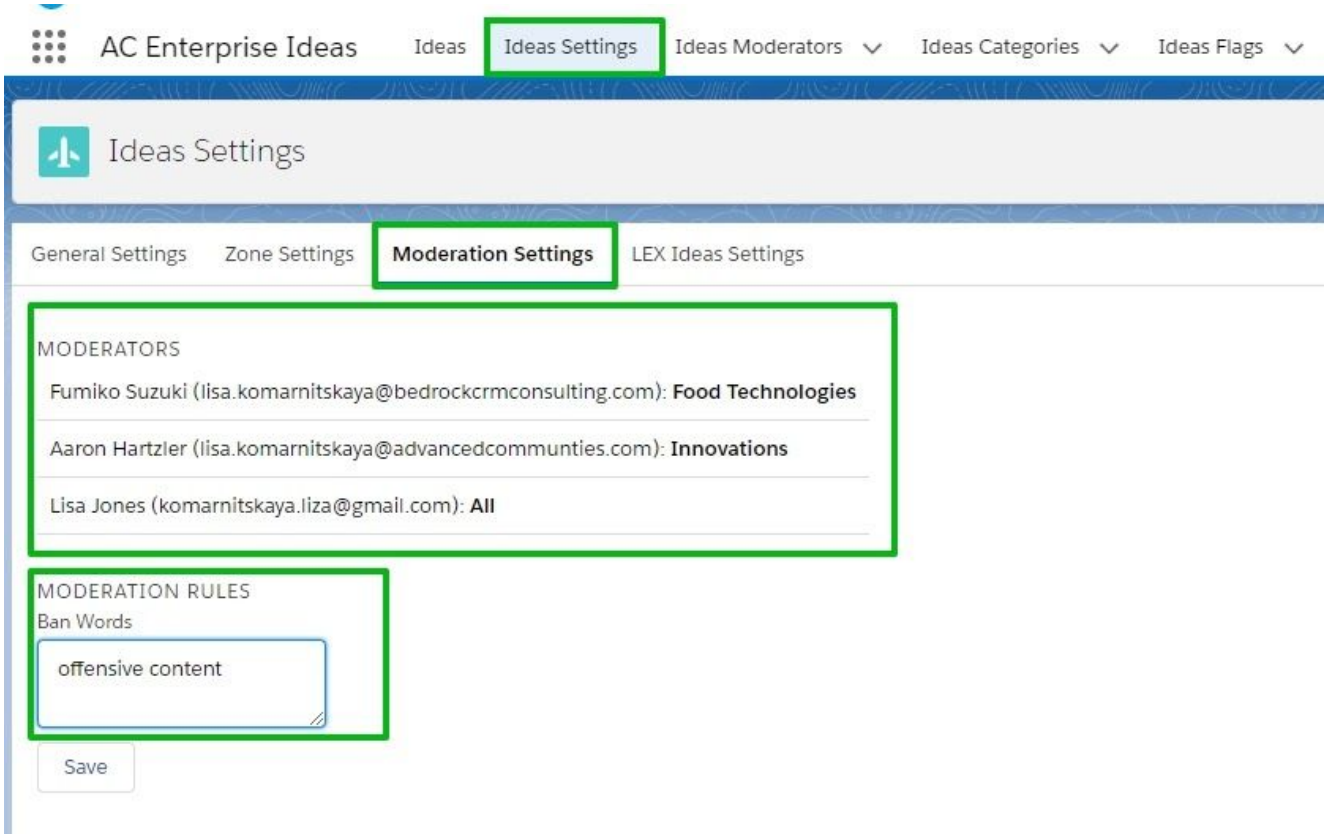


Add the list of banned words and community members will be warned about using forbidden content when creating and commenting on the idea.


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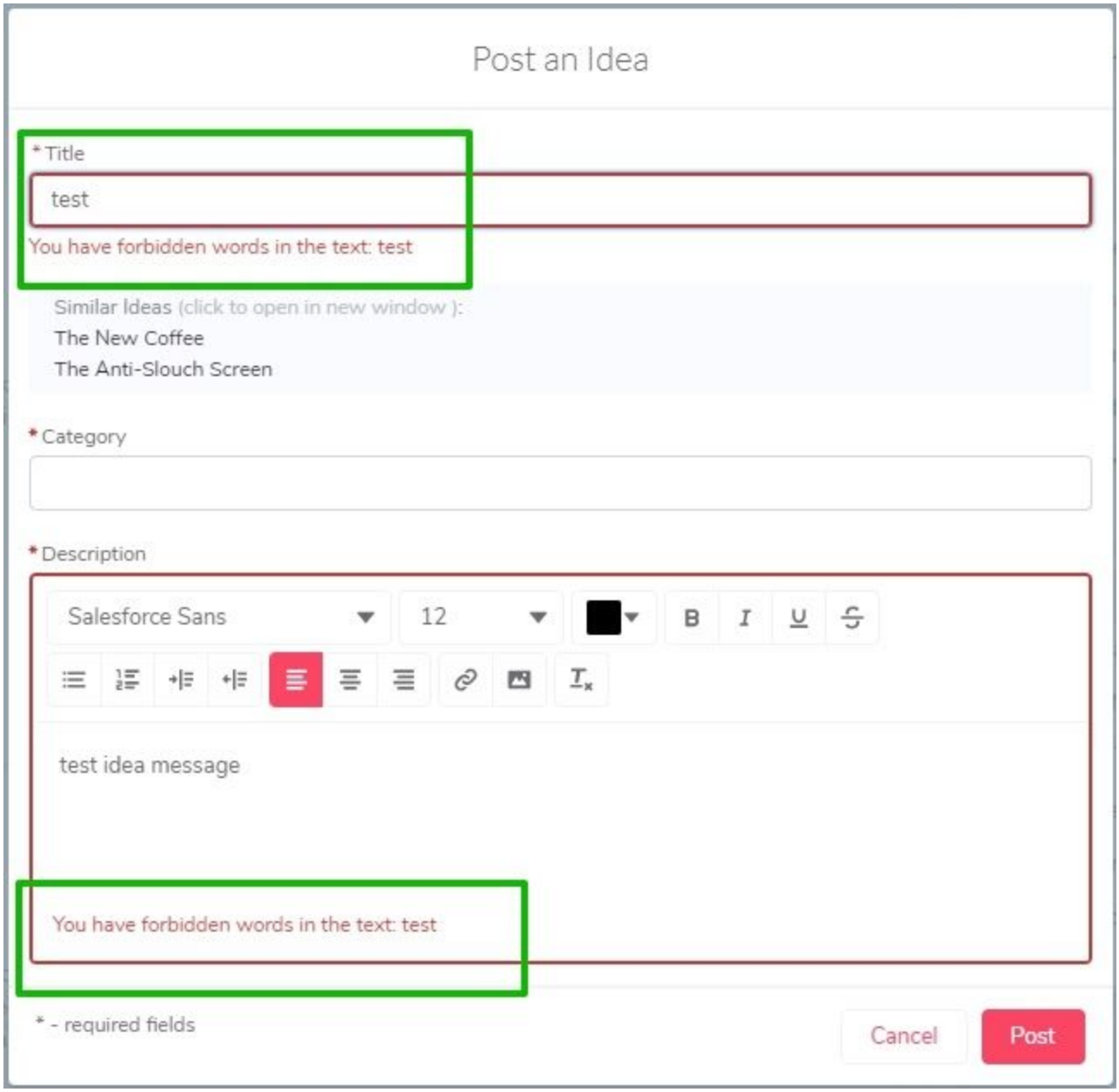


## Ideas Moderators

You can allocate Idea Moderators for any category(s). The idea moderators would receive a notification for each new idea that is posted in that category.

To assign a user as a moderator, you need to do the following. Open the page by clicking on the “Ideas Moderators" tab, click on the “New” button or the “New Ideas Moderator”.


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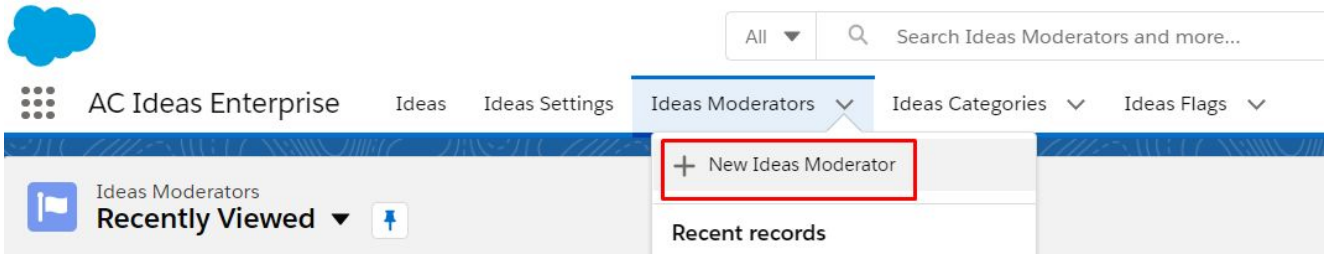
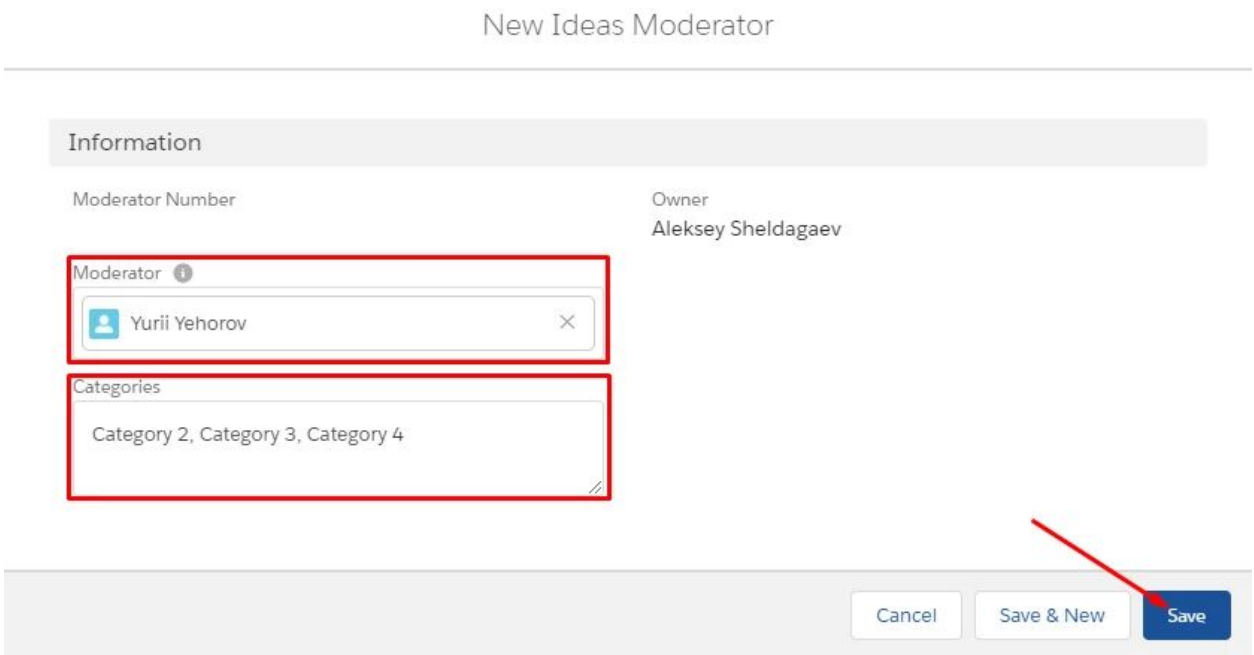



In the New Ideas Moderator window that appears, click on the search field, to assign the proposed users - Moderator, select the appropriate User by clicking on the Name.
In the Categories field, enter the Category or Category name with the "," or leave the value "All", which is suggested by default. Click Save.




## Ideas Categories

Custom Categories Settings.

Standard Salesforce configuration does not provide a way to distinguish categories in different Zones or to create a hierarchy. Therefore, we have designed a workaround, so that you can create different categories for each zone using custom settings. It is also possible to add sub-categories. The custom category should be bound to the main one.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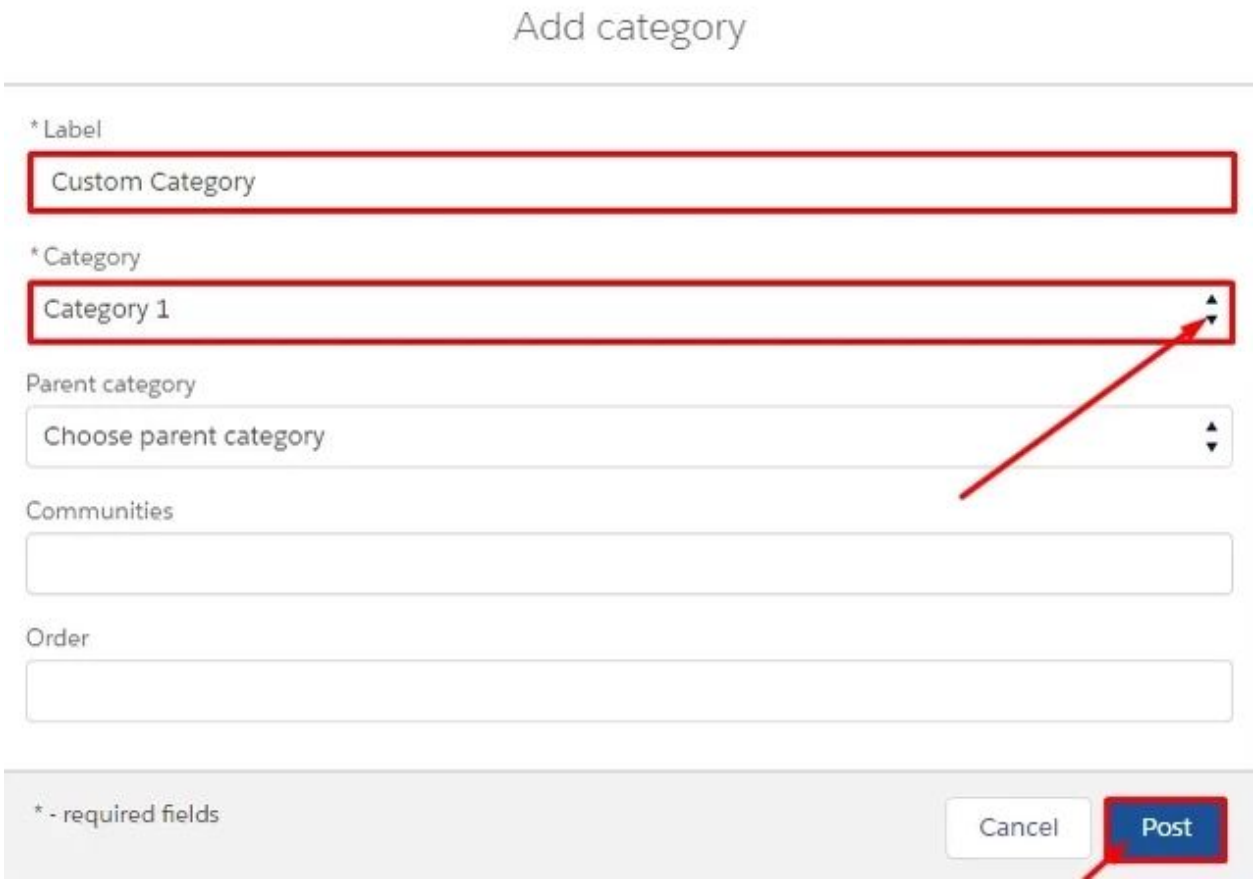
***NOTE**: Make sure you checked the "Enable Categories" checkbox in Ideas Settings (Classic UI – Setup – Ideas Settings – Edit – Enable Categories – Save).*

1. Choose "Add Category".

2. In the "Add Category" window fill the next fields:

- enter a Label of a custom category;
- for the "Category" field, select already existing category (Label and Category can be named the same way);





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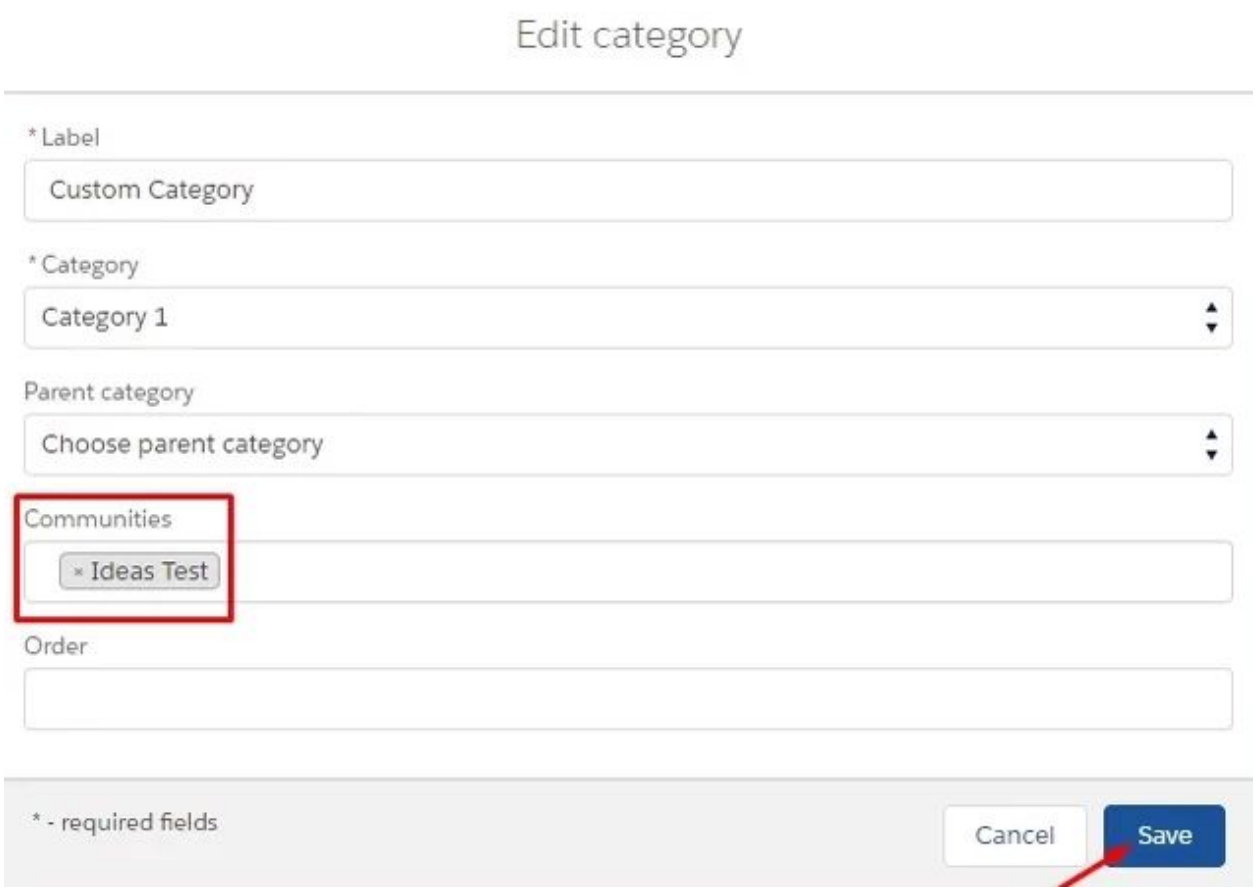
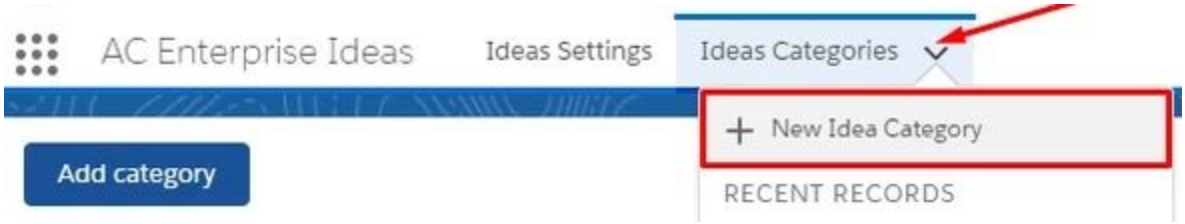
- choose a community this category will be available for;
- click “Post”/ “Save”.




3. You can also add Custom Category from the tab’s drop-down list.




4. It is possible to create a Categories Hierarchy. To do this, you add a sub-category by simply choosing a parent category for the category when creating it.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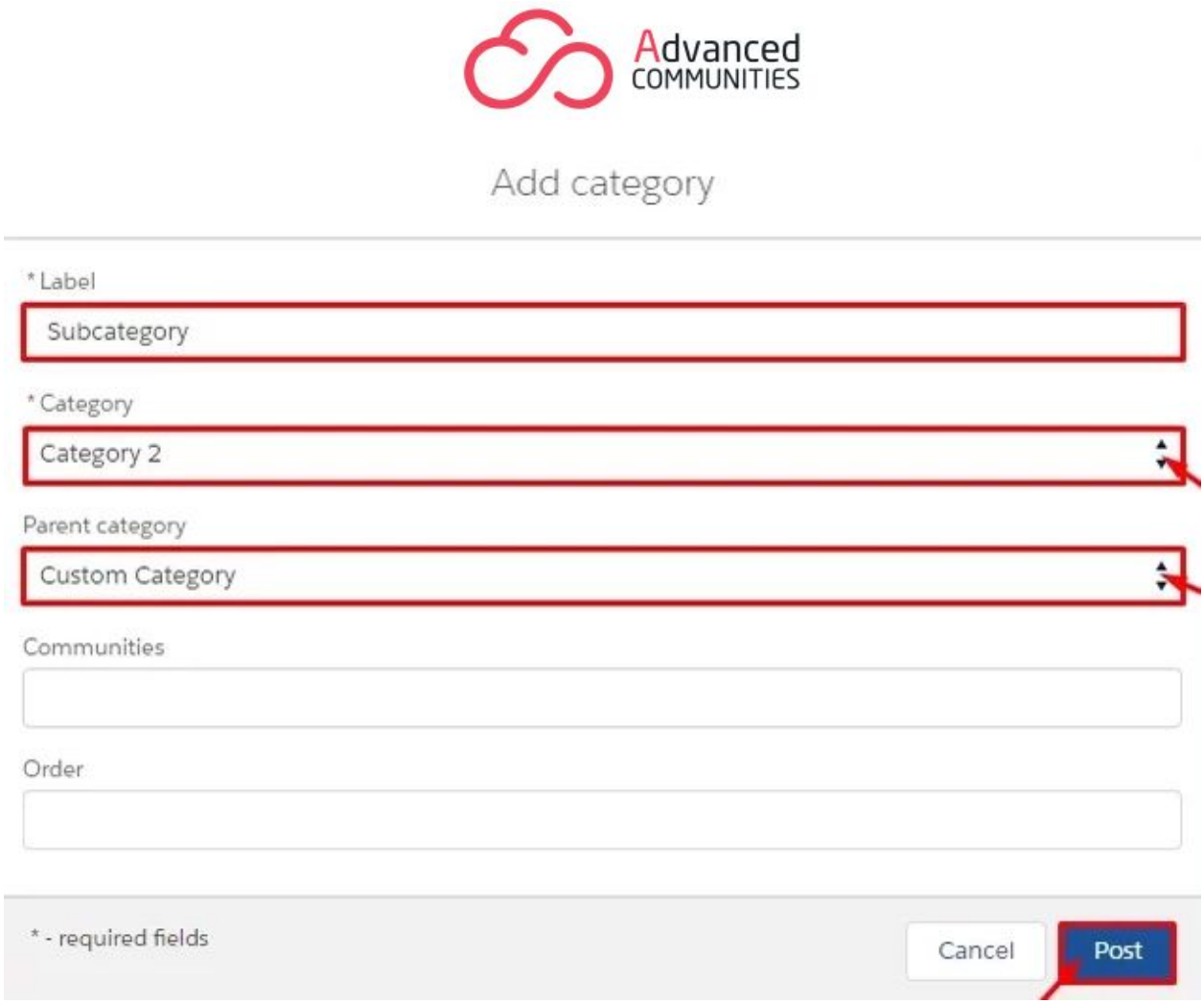
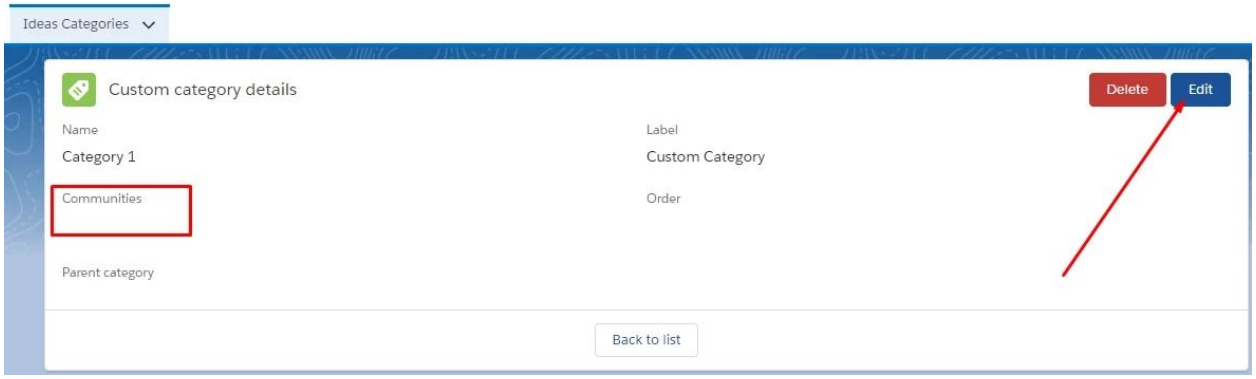



5. Custom categories can be edited/deleted. Click on the category's name to make changes.




6. Activate created Custom Categories: switch to the Ideas Settings tab – Zone Settings subtab – choose appropriate zone – enable "Use Custom Categories" checkbox.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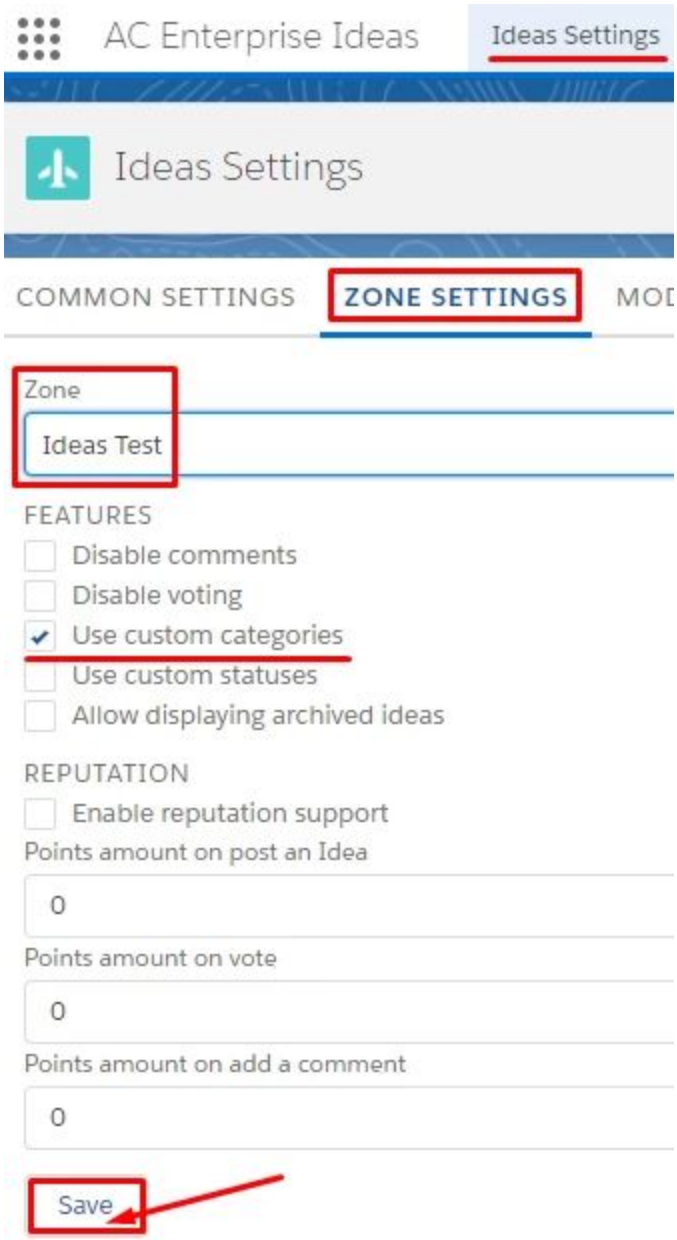


## Ideas Flags

You can enable flagging feature for Ideas in Ideas Settings - General Settings.


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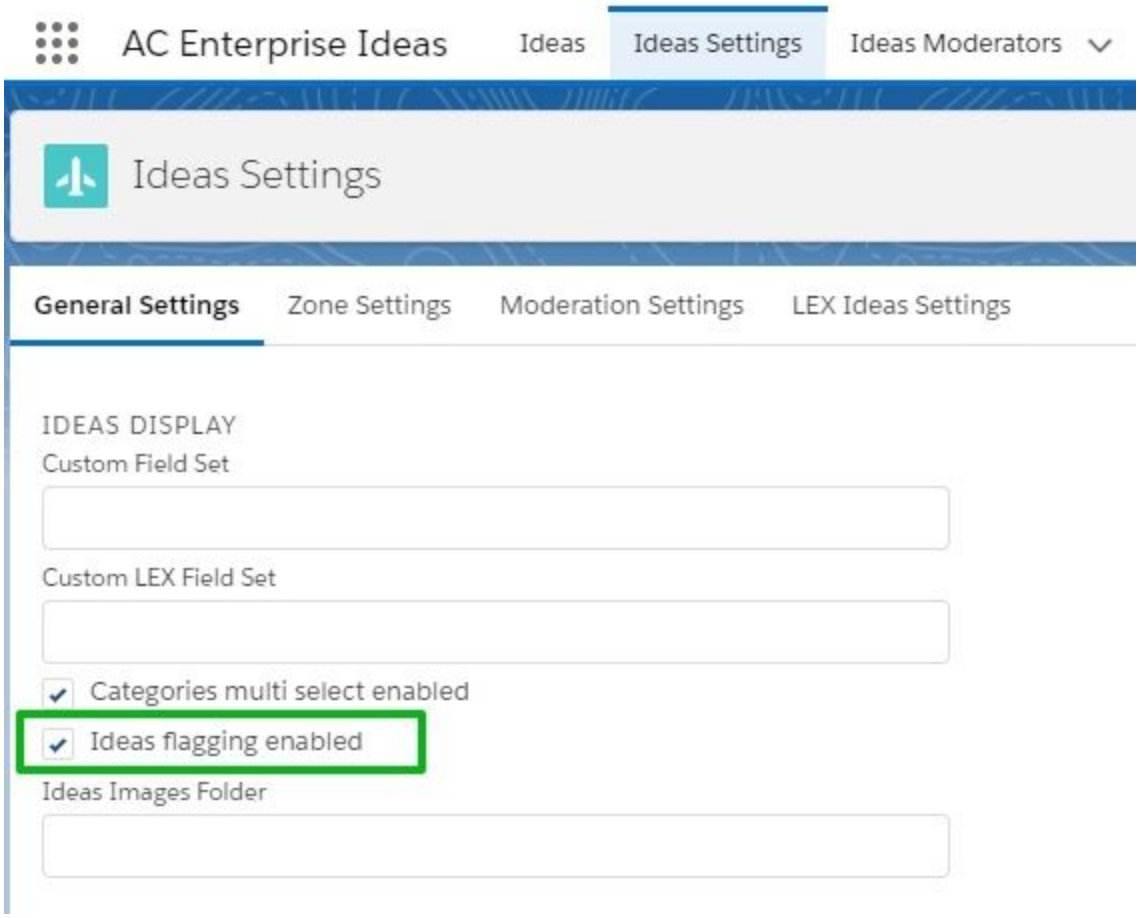


When the flagging feature is enabled community members can flag the idea they do not like for some reason and explain their opinion with a flagging message.

Keep tracking on the flagged Ideas in the Ideas Flags tab.


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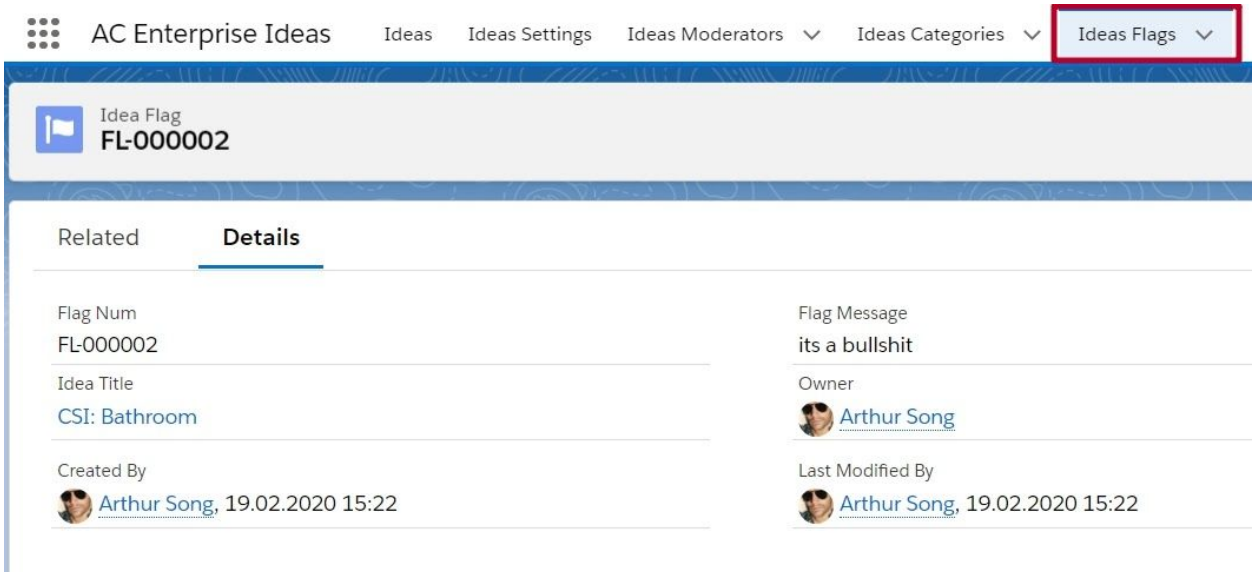
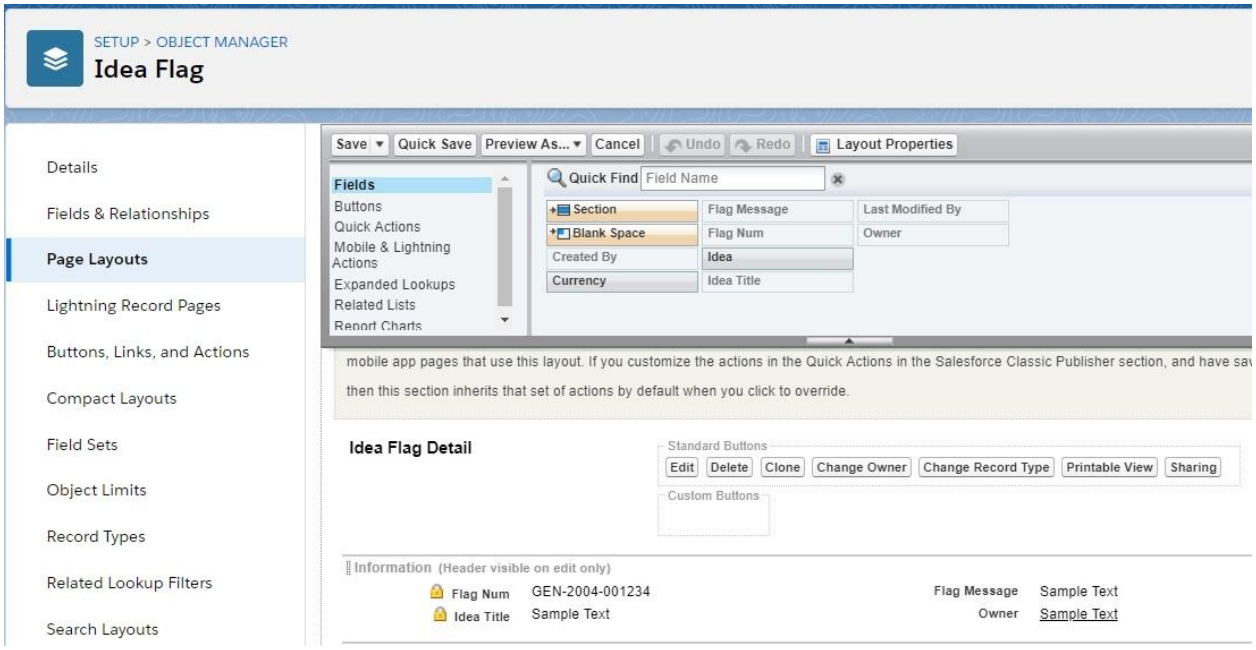



To start using this feature, check the Ideas Flags tab is the “Default On” for your community managers and if they have the appropriate object and field-level access.

Make sure the following fields are added to the Idea Flag object layout:

- Idea Title
- Flag Message





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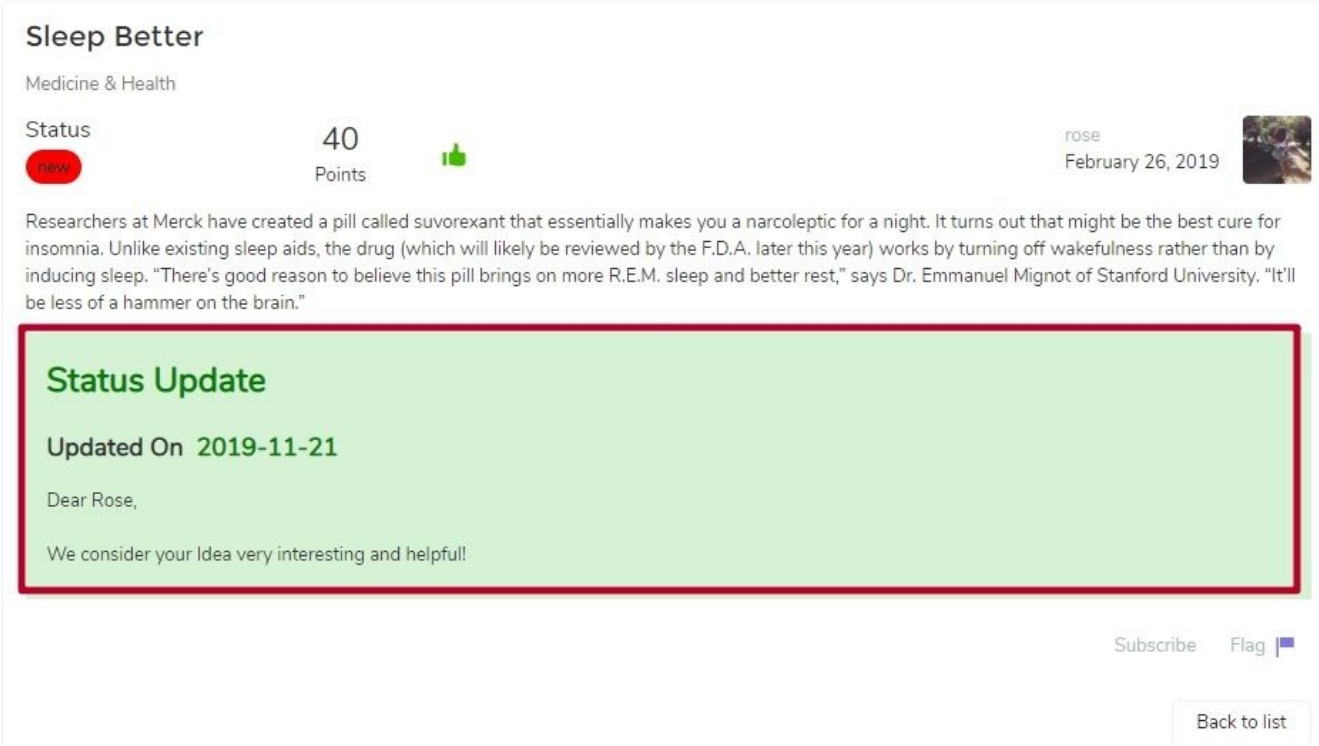
## Ideas Official Answer

Give official answers to posted ideas for community members to know they are listened to and heard.




To add an official answer, edit the idea, add your answer to the Official Answer field and set up the date answer is added.

## Page Variations usage to setup multiple Ideas Zones

This feature allows creating different versions of the page and making these options available to specific audiences and groups. You can use Page Variations to try out different page layouts and styles or create variations that are aimed for a different audience. Each page on the community, including custom pages, should have one default page variation. You can add as many extra variations as you need on the page's Page Variations tab.

In order to customize page variations for audiences, you need to create two audiences and two page-variations for the "Idea List" page:

1. Community Builder – menu pages – choose Idea List – click Page Properties – choose Page variation – click Manage Audiences – New Audience.
2. Create two Audiences called “Community Users” and “Internal Users”:
    1) For the “Community Users” audience, select the appropriate profile for external users.
    2) For the “Internal Users” audience, select the appropriate profile for internal users.
3. You are able to create two page-variations when at least two Audiences have been created.
4. Create two page-variations called “Idea Community Users” and “Idea Internal Users”:
    1) For “Idea Community Users” page variation assign an audience called “Community Users”.
    2) For “Idea Internal Users" page variation assign an audience called “Internal Users”.

## Custom Field Settings

**Note:** Custom Field Settings are available in Classic UI.

Create Custom Fields and Field Sets to display unique information when creating ideas.

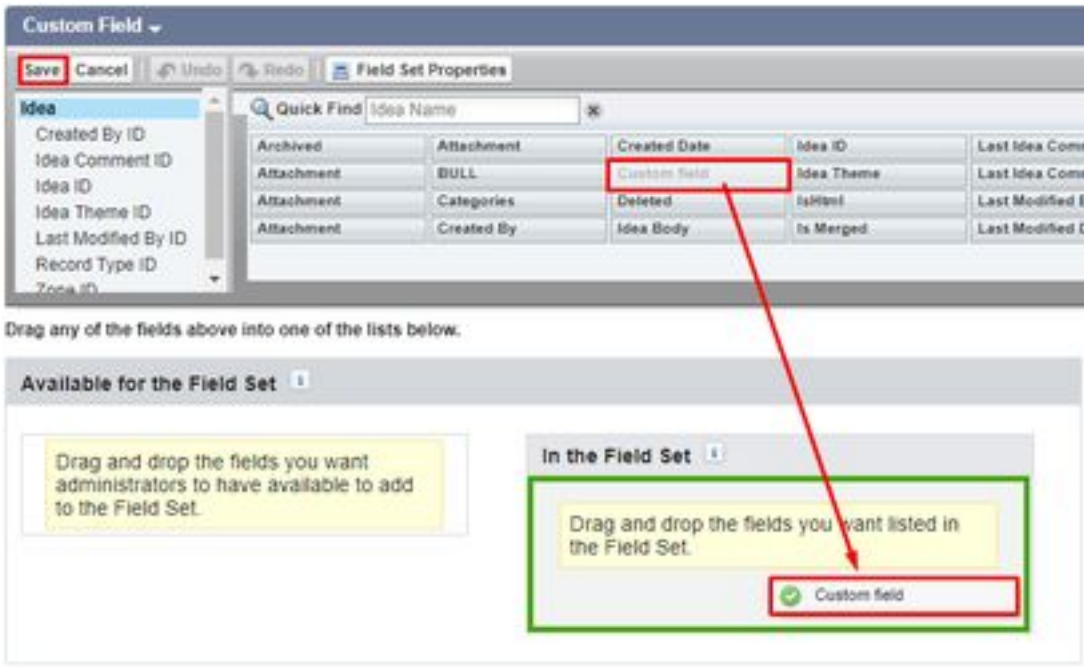
To create a custom field, do the following steps:

1. Go to Setup – Quick find box – type Ideas – choose Fields item – click New.
2. Choose the field type.
3. Enter field Label.
4. Establish field-level security.
5. Add to page layout – click Save.

To create a Field set, do the following steps:

1. Go to Setup – Quick Find / Search – Ideas – Field Sets item – click New.

2. Fill in all required fields and click Save.
3. Find the created custom field and drag and drop it to the "In the Field Set" section. Click Save.




4. In order to display this field set when creating an idea, copy its API name.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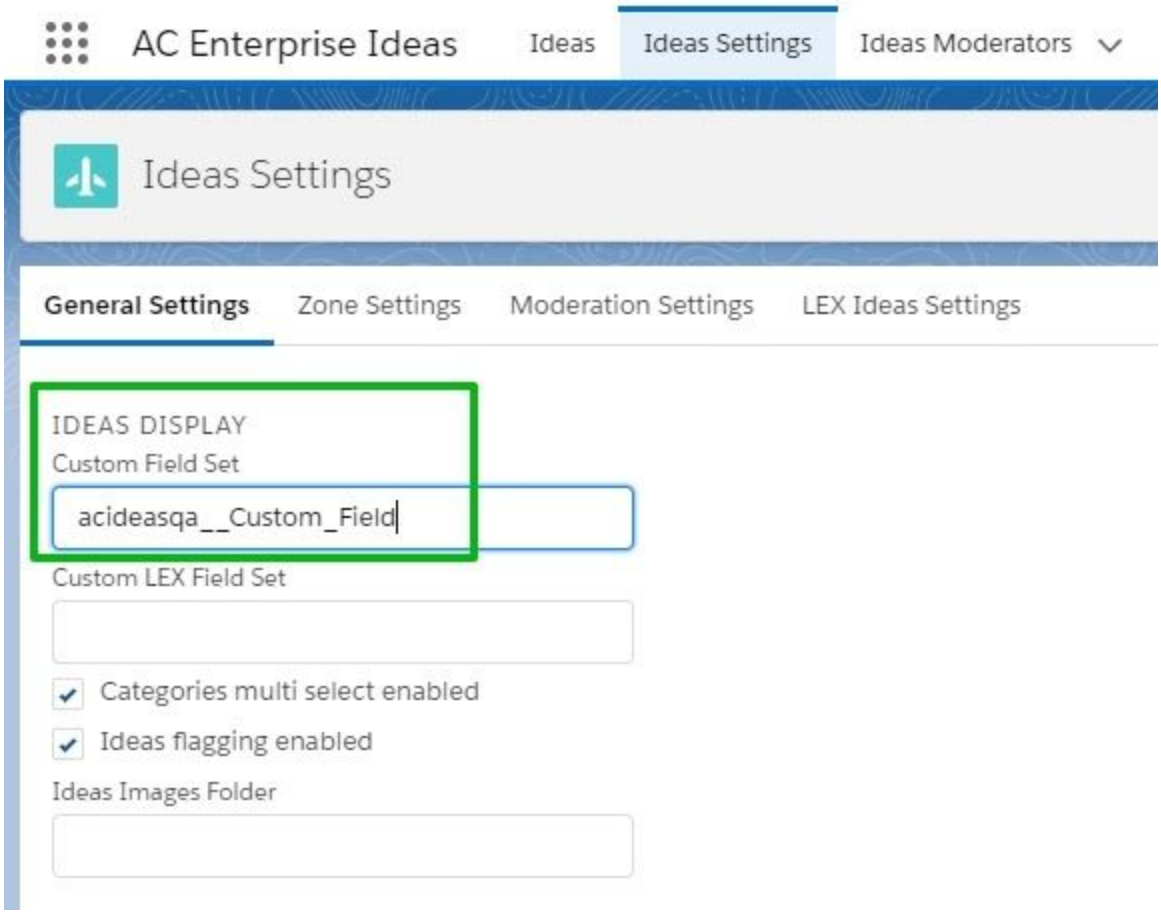
5. Insert the copied API field set's name to Lightning Experience – AC Enterprise Ideas – Ideas Settings tab – General Settings subtab – "Custom field set" field.




6. See custom field added to "Post an Idea".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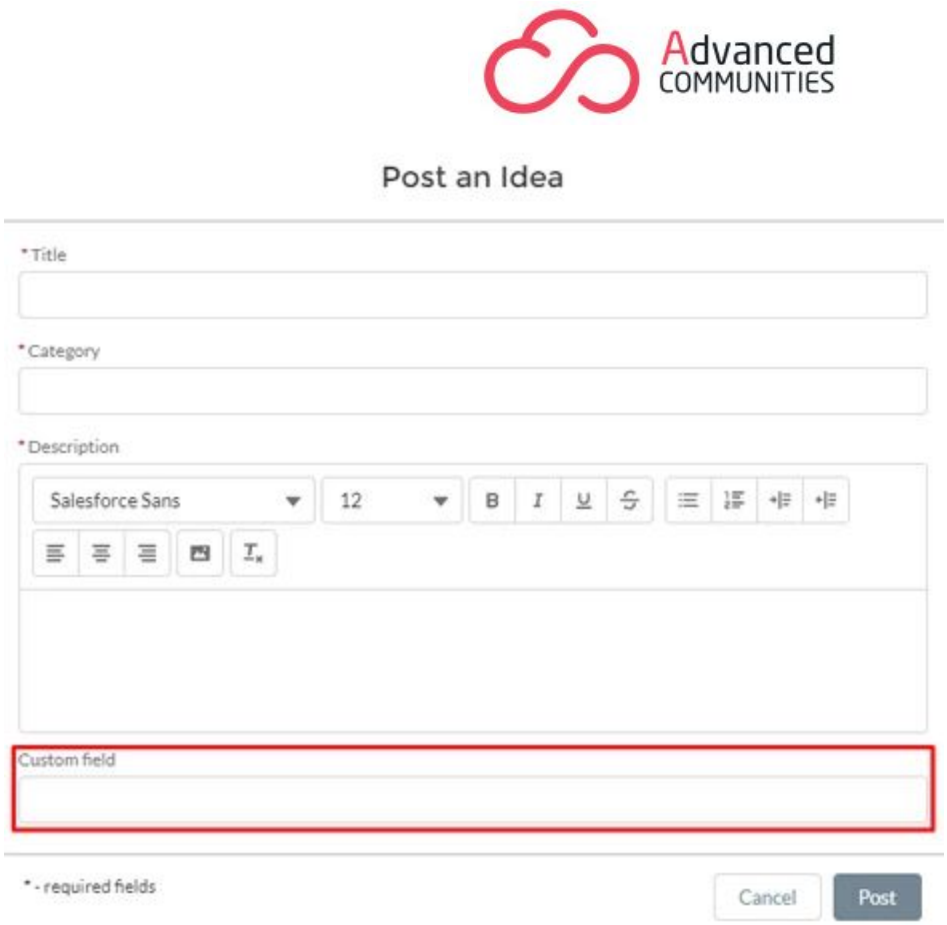



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# NOTIFICATIONS

You can set up sending notifications for subscribers, assign moderators, using categories and statuses of ideas.

## Configuration

**Email Templates are available within both Classic and Lightning Experience Interfaces:**
Setup – Search Find box – Classic Email Templates.

**To change an Email Template:**
Select a template – click on its Name – click Edit HTML Version button – HTML Body field – click Save.

**Replace** the example.com/support in each email template with your community URL to provide correct links in the email notifications that lead to your community.

For multiple communities notifications:

1) Enable the "Enable notifications for multiple communities" checkbox in the Ideas Settings - General Settings.
2) Configure prebuilt email templates that come with the package to be notified about internal changes performed to ideas by admins/managers.

Open Ideas tab, choose any Ideas record, and copy its address before the number.


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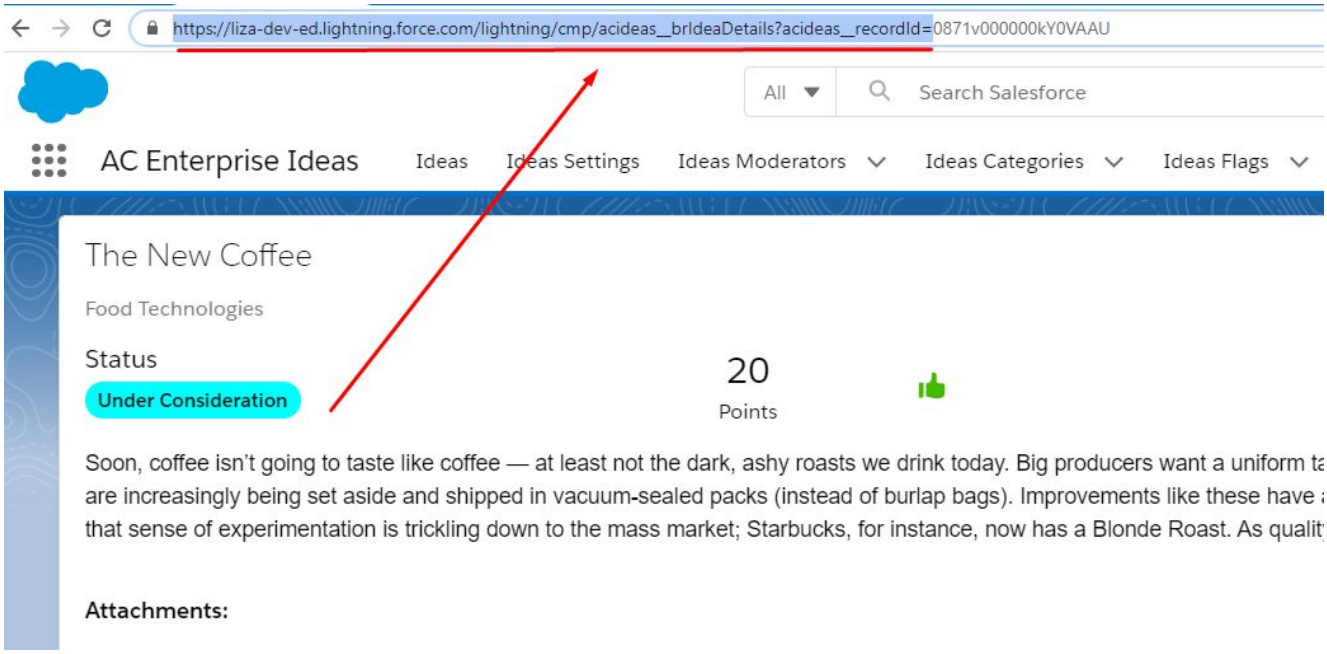
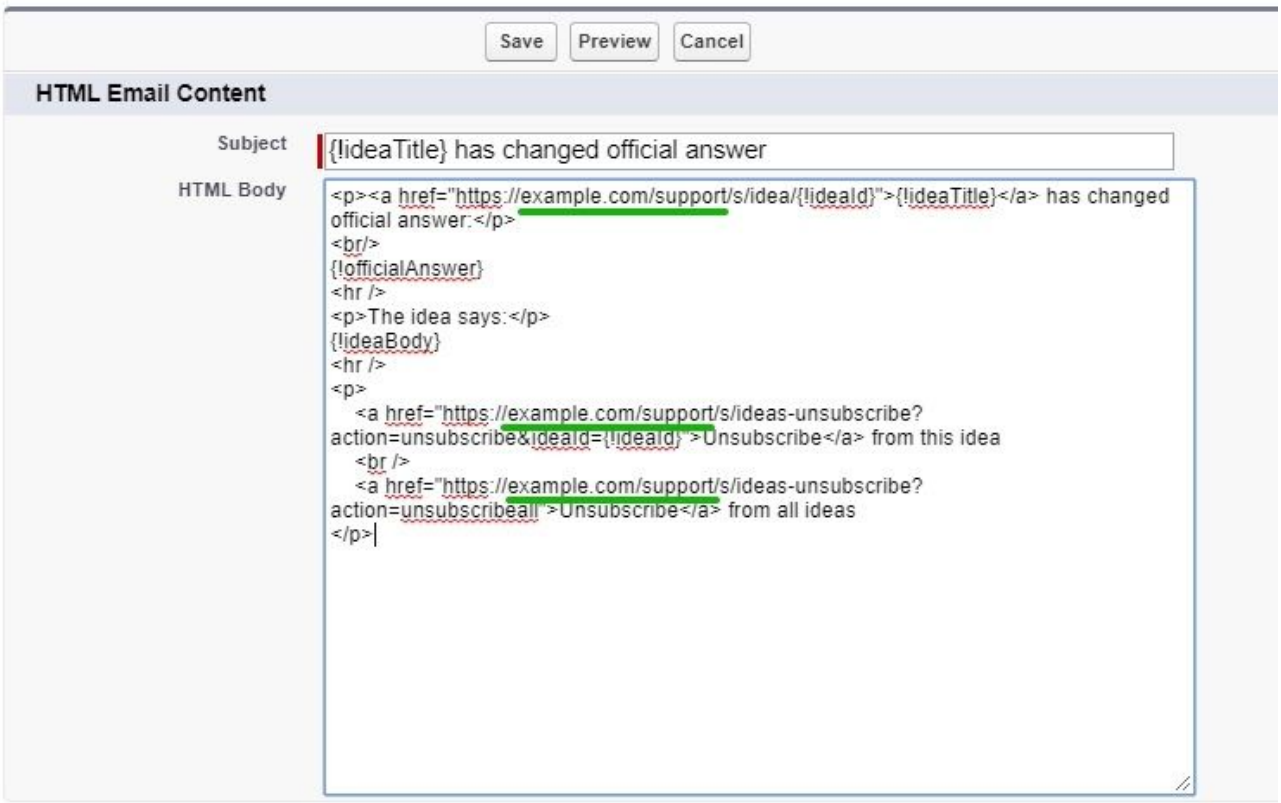



Replace the example.com/support in each email template with ideas record ID URL.





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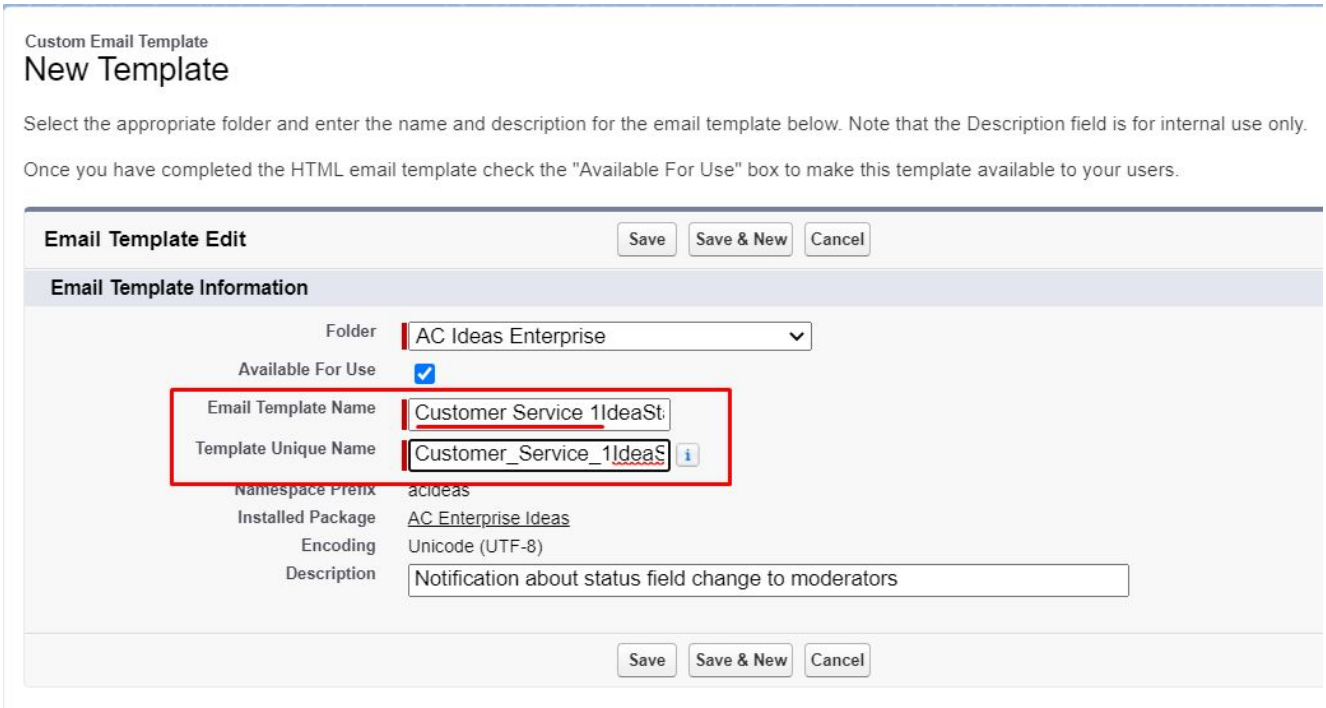
3) Configure email templates to notify community members and managers about changes performed to ideas on the community.

- **Clone** the prebuilt Ideas Enterprise email template

Select a template – click on its Name - click the “Clone” button.

- **Add** the name of the community before the template name




- **Replace** the example.com/support in each email template with your community URL to provide correct links in the email notifications that lead to your community.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When you change the Email Template, you have to definitely use the variables closed in curly braces "{ }".

**Important!**

If you have a version installed before Winter 19, we strongly recommend updating the "IdeaOfficialAnswerChangeToSubscriber" template manually, as **email templates can NOT be updated automatically!**

```
<p><a href="https://example.com/support/s/idea/{!ideaId}">{!ideaTitle}</a> has changed official answer:</p>
<br/>
{!officialAnswer}
<hr />
<p>The idea says:</p>
{!ideaBody}
<hr />
<p>
                                                                                <a href="https://example.com/support/s/ideas-unsubscribe?action=unsubscribe&ideaId={!ideaId}">Unsubscribe</a> from this idea
  <br />
                                                                                <a href="https://example.com/support/s/ideas-unsubscribe?action=unsubscribeall">Unsubscribe</a> from all ideas
</p>
```


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**Set a common sender for emails:**

You need to setup Organization-Wide email in Setup → Organization-Wide Email Addresses and then put the created email address in the Organization-Wide Email Address field in Ideas Settings → Common Settings → Notifications.
If Organization-Wide Email Address is empty then the system will use a comment author as a sender.

## Moderators Notifications

You can assign internal users to the Idea Moderator role with the ability to split responsibilities by Ideas Categories if necessary (See section Ideas Moderators).

**Moderators get email notifications when:**

- the new idea is created (the creator does not receive a notification);
- the new comment is added (the commentator does not receive a notification);
- there is a status update.

## Subscribers Notifications

Users who are subscribed to an Idea can get email notifications only if they are enabled (See section Ideas Settings).

**Subscribers get email notifications when:**

- the new comment is added (the moderator does not receive a notification);
- there is a status update (the moderator does not receive a notification).

## TRANSLATIONS

All component's labels have corresponding instances in Custom Labels. Use them to add translations for different languages.

## RUNNING APEX TESTS

Requirements:

- Create test Idea Zone with name **"TestPublic"**
- Set a role for the user which was used to run tests

***Note:*** *Some custom validation rules on Idea, Account, Contact, User may cause problems with running Apex Tests.*

## GET IN TOUCH

AC Ideas Enterprise is created and maintained by AdvancedCommunities.com – the Community Cloud experts.

We specialize in Community Cloud customization, development and consulting. Feel free to contact us regarding anything related to Community Cloud.

https://advancedcommunities.com
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