



Fave&Follow – User Guide

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Overview

The Fave&Follow app was designed to solve common business use cases for Salesforce Knowledge subscriptions and favorites management within Salesforce Communities:

1. Ability to Favorite pages and records within a Community, including management of saved Favorites.
2. For authenticated Community Members, allow them to subscribe to email alerts when Knowledge Articles are updated within a Community.
3. Reporting on Favorites activity within a Community for Engagement Management.

The Fave&Follow app solves all of these business use cases:

1. Community Users can manage Favorite pages, records, record list views and Knowledge Articles including order prioritization, remove favorites or subscriptions, and filter by type for quick recall.
2. Community Users can subscribe to email alerts when a Knowledge Article is updated.
3. Community Managers can now report on Favorite and Subscription activity through standard Salesforce Reports and Dashboards.
4. Favorites and Subscriptions include the Community Network ID so that you can report on activity from many communities if you need to.
5. Automate your Content and Portal User onboarding processes with configurable Pre-Loaded Favorites and Subscriptions automatically for new Community Users to review.

Installation and Setup

After downloading the package from the AppExchange, a System Administrator should prepare a few assets in the Salesforce instance to fully configure the Fave&Follow app for use.

Below is a summary of the steps required to configure and activate the Favorites and Subscriptions application in your Community based on the order the System Administrator should take.

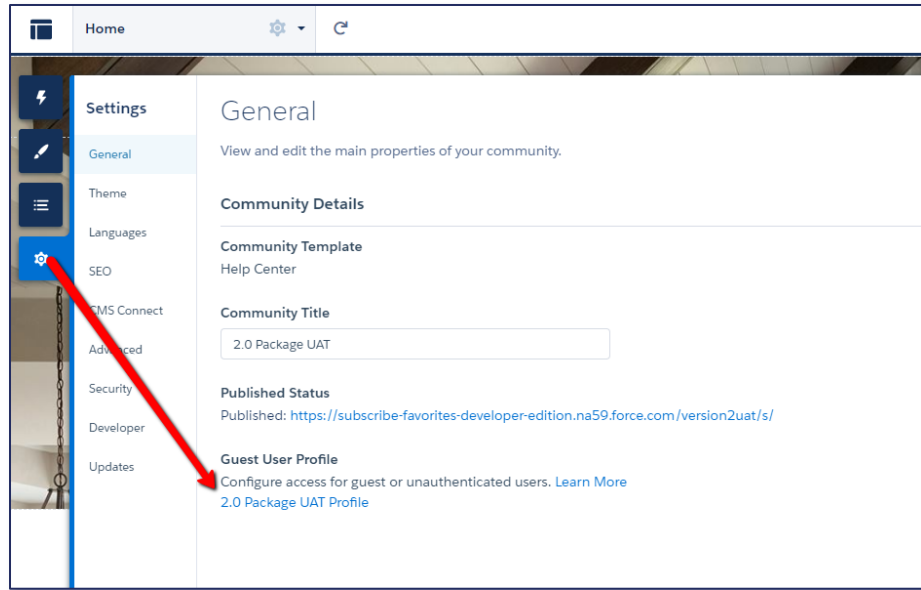
1. Required: [Configure Profile Access](#) for all Users and Community-related Profiles as needed to enable Favorites in the Community User experience and extend read access to internal Salesforce Users for Reporting purposes.
2. Required: [Setup a Custom Setting](#) for Favorites and Subscriptions
 - a. Required to use Favorites and Subscriptions in an Organization
 - b. Set up Email Template settings
 - c. Configure Option to hide Archived Articles from Favorites History
 - d. Associate Salesforce Organization ID to Favorites
 - e. Add Custom Logo for the Email Alert to Community Users on Article notifications
3. Required for Email Alerts - [Scheduled Apex Batches](#) - Fave&Follow
 - a. Set up Apex Batches if Subscriptions on Knowledge Articles should be sent to Community Users who subscribe to Articles

4. Required: Configure Community Builder for [Favorites Widget Component](#)
 - a. Set Placement of Component to each page type.
 - i. Add to Home Page Template Footer Favorites Widget Component
 - ii. Add to any subpage Template Footer Favorites Widget Component
 - iii. Test Desktop and Mobile layout and configuration setup of component
 - b. Publish Changes
5. Optional: Custom Metadata Type – [Preloaded Favorites](#)
 - a. Configure records for Preloaded Favorites if applicable
6. Optional Setup: Custom Metadata Type – [Favorites and Subscriptions](#)
 - a. You can choose to customize your Favorites Icons; by default the standard Salesforce Icons will be used

Profiles and Security

Enable Favorites and Subscriptions object access to all profiles who should be able to leverage the functionality within the Community, as well as Users who should be able to report internally on the dashboard.

- For Internal Users who need to Report on Favorites and Subscriptions, their Profiles need:
 - Object Access: Favorites & Subscriptions
 - Read; View All
 - Tab Setting: Default Off
 - Note: This access can be granted at the User Profile level, or granted via a Permission Set
- For Community Users who need access to create & manage their Favorites, their Profile needs:
 - Object Access: Favorites & Subscriptions
 - Create; Read; Edit; Delete
 - Note: This access is best granted at the Community User Profile level



As a best practice, we recommend logging in as a Community User to verify that they can see the Favorites Icon. For internal Users, we recommend verifying that the relevant Users are able to view and report on Favorites and Subscriptions records.

Example of Profile

1. Navigate to your Custom Settings via **Setup | Build | Develop | Custom Settings**, or by searching for “Custom Settings” in the Quick Find, and then click ‘Manage’ next to the “Favorites and Subscriptions” Custom Setting
2. Create the Default Organization Level record by clicking the “New” button at the top of your screen

Custom Setting
Favorites and Subscriptions

If the custom setting is a list, click **New** to add a new set of data. For example, if your application had a setting for country codes, each set might include the country's name and dialing code.

If the custom setting is a hierarchy, you can add data for the user, profile, or organization level. For example, you may want different values to display depending on whether a specific user is running the app, a specific profile, or just a general user.

New

▼ **Default Organization Level Value**

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 Other **All**

New

Setup Owner	Location
No records to display.	

3. Set up the Default Organization Level record as follows:

Favorites and Subscriptions Edit

Provide values for the fields you created. This data is cached with the application.

Edit Favorites and Subscriptions **Save** **Cancel**

Favorites and Subscriptions Information

Location

a Article Batch Email Template ID

b Client Name

c Custom Verbiage

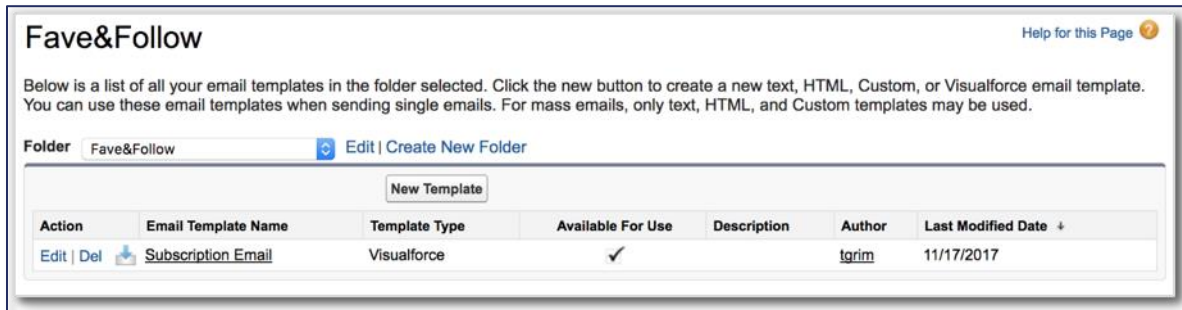
d Disable Subscriptions ☐

e Hide Archived Articles ☐

f Logo_DocumentId

g SFInstance

- a. Enter the Record ID of the default Subscription Alert Email Template provided with the Fave&Follow Package. Alternatively, you can create your own customized template using Visualforce, and use that ID instead.



- b. Enter your Company Name; this will be used in the Subject Line of the default Subscription Alert Email Template
 - i. If you create your own template, this information is not necessary
- c. Enter some brief language for the Visualforce Subscription Alerts Email Template. This will become the body of the Email Alert.
 - i. If you create your own template, this information is not necessary
- d. Optional; use this checkbox to toggle Subscription Ability from the Community off
- e. Optional; use this checkbox to hide Archived Articles from Community and Favorites Lists for Community Users
- f. The Record ID of an externally available Public Document; this will be used as the Logo in the Visualforce Subscription Email Alert template
 - i. If you create your own template, this information is not necessary
- g. Enter your Salesforce Instance reference, ex. NA11. For assistance with finding this information, please visit this Salesforce Knowledge Article: <https://help.salesforce.com/articleView?id=000002889&type=1>

Scheduled Apex Batches - Fave&Follow

Have your Salesforce Administrator set up the nightly batch jobs for Fave&Follow:

1. Daily Email Alert for when an Article is updated; alert is sent to all subscribers
2. Daily Archiving and Hiding Archived Articles from Community Favorites List

To schedule these jobs:

1. Navigate to **Setup | Develop | Apex Classes**, or search "Apex Classes" in the Quick Find
2. Select the "Schedule Apex" button at the top of the screen
3. Enter an intuitive job name and pick the appropriate Apex class for the job you wanted to schedule:

- a. fav_follow__SubscriptionEmailBatchScheduler for daily email alerts
 - b. fav_follow__KnowledgeArticleVersionBatch for hiding archived articles
4. Select the “Weekly” radio button and the days on which you would like the job to run. It is recommended to run these jobs daily to keep your data up-to-date.
5. Choose a start and end date and your preferred start time. We recommend choosing an end date very far out, such as 20 years in the future so the batch doesn’t inadvertently stop running.

Save Cancel

Job Name FavoritesSubscriptionEmailBatchScheduler

Apex Class SubscriptionEmailBatchScheduler

Schedule Apex Execution

Frequency

☒ Weekly
☐ Monthly

Recurs every week on

☐ Sunday
☒ Monday
☐ Tuesday
☐ Wednesday
☐ Thursday
☐ Friday
☐ Saturday

Start 11/20/2017 [11/20/2017]

End 12/20/2017 [11/20/2017]

Preferred Start Time --None-- ▼

Exact start time will depend on job queue activity.

Community Builder Setup – Favorites Widget

Fave&Follow allows for customization by a Community Manager including builder component placement and custom icons for Favorites within the user interface.

Set Up Favorites Widget Component

1. Navigate to the Community builder for the Site you'd like to enable for Fave&Follow.
2. From the Builder on the Home page, add the "Favorites Widget" from the Custom Components section
 - Favorites Pixel settings for Small are to set Mobile, Medium for tablet else they are for the desktop render. Recommended to use inspect element to find the proper pixel mapping for your community as the builder preview is not accurate until after publishing and viewing from community.
 - Add Favorites widget onto the **Template Footer Bottom** of the lightning Home page.
 - Home Page Template Footer must be applied if Favorites menu needs accessed, this step is not required.
 - Add Favorites widget onto the **Template Footer Bottom** of any lightning Subpage, *if favorites can be added on all other non-home page locations otherwise it can be applied only to specific pages but must be set to each page as needed.*
 - Toggle to Preview mode to see the location of the Favorite Star on the page or Publish and view from community site.
 - Apply custom positioning of the component with the Component settings, set custom location based on Desktop, Tablet, and Mobile configuration.
 - Desired pixel setup will vary based on the Theme and Community Template.

FavoritesWidget ⌵ ✕

Left

Right

150px

Top

115px

Bottom

Left (small)

40px

Right (small)

Top (small)

106px

Bottom (small)

Left (medium)

Right (medium)

200px

Top (medium)

163px

Bottom (medium)

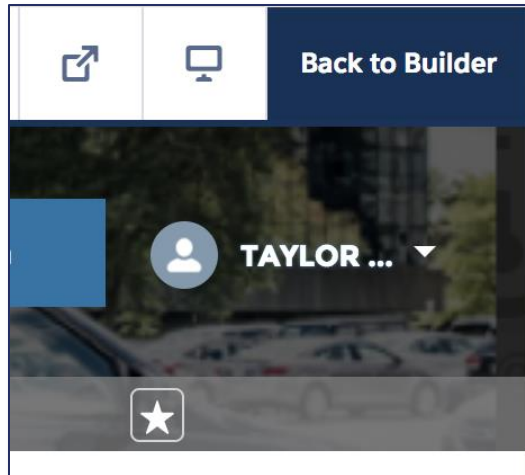
☒ Fill star icon?

Favorites Widget Label

My Favorites

Favorites Widget Position

left



Example of Favorites Widget Component

Custom Metadata Type: Preloaded Favorites

Administrators can choose to configure pre-loaded Favorite and Subscription records in the Community. If configured, a pre-defined set of favorites are generated when a new community user is created based on a Custom Metadata Type record. Preloaded favorites only apply to logged-in Community Members.

Considerations for Preloaded Favorites:

- Administrators are not restricted by Content type, but keep in mind your security policies and configuration by profile as to not assign a Favorite record to an object, list view or page a User is not allowed to see (based on Profile or Audience configuration in your Community)
- Content types for Preloaded Favorites can include:
 - Custom Community Pages
 - List Views
 - Topics
 - Articles.
- Administrators can determine Subscription settings for email alerts on Preloaded Favorites if they want Article updates to notify the Community User via email

Step 1 –Create Favorites as a Community Member

To configure Preloaded Favorites correctly, we recommend using a sample Favorite record created manually from the standard User interface for each Favorite to be configured. Log in as a Community Member and create any Favorites that should be preloaded.

Step 2 –Review Favorites & Subscriptions Records in Salesforce

Once you have manually logged in as a Community member and created the Favorites you want to be generated automatically as Content bundle, go to your Internal Salesforce and view the Favorites and Subscriptions records you have created. *Tip:* Use a list view to segment the data and find the records

easily. These IDs will be the mapping guide you use when preparing the Custom Metadata records for Preloaded Content to ensure all the proper data endpoints are configured to support the desired automation.

Step 3 – Create Custom Metadata Pre-loaded Favorites Records

Navigate to your Custom Metadata Types via **Setup | Build | Develop | Custom Metadata Types**, or by searching for “Custom Metadata Types” in the Quick Find, and then click ‘Manage Records’ next to the “Pre-Loaded Favorite” Custom Metadata Type.

1. Create records in the “Pre-Loaded Favorite” Custom Metadata Type for *each* preloaded Favorite record following the instructions below:

Pre-Loaded Favorite Detail		Edit	Delete	Clone
Label	ArticleFav1Preloader			
Pre-Loaded Favorite Name	ArticleFav1			
Record Id	kA1f400000GqRxCAK			
Subscription	☒			
Full URL	https://subscribe-favorites-developer-edition.na59.force.com/version2uat/s/article/Creating-New-Rule-Entries			
Default Name of Favorite	ArticleFav1Preloader			
Sort Order	2			
Network Name	2.0 Package UAT			
Created By	Gears Design, 7/11/2019 10:28 AM			

- a. **Label:** Choose a general name that is intuitive enough to understand its purpose. This is the CMDT record’s Name for System Administrator view of the CMDT, click tab to auto-generate the CMDT record’s API name for the following field ‘Pre-Loaded Favorite Name’
- b. **Pre-Loaded Favorite Name** is the API name of the Label; underscores and no spaces on these system fields are allowed
- c. **Record ID:** This should match the sample Favorite and Subscription record you created in step 1, use the exact value from the sample data created as IDs are case sensitive.
- d. **Subscription:** This only applies to the Knowledge Article type; check this box if the Preloaded Article favorite should notify users via email whenever an update is made.
- e. **Full URL:** This should match the sample Favorite and Subscription record generated; use the exact value from the sample records you created in Step 1.
- f. **Default Name of Favorite:** This will be the Label of the Favorite in the Community User’s view, i.e. ‘Getting Started Page’
- g. **Sort Order:** Defines the order of Favorites in the user interface for the Community User
- h. **Network Name:** this is the Community Name where you want the Favorite to be added. Enter the Community Name exactly as it is labeled in the Community Workspace

After configuring Preloaded Favorites into the Custom Metadata setup, validate records by generating a new Community User and setting the user to Active. Login as the test user, open the Favorites menu and verify that all Preconfigured Records were properly created through process.

Preloaded Troubleshooting Tips:

1. Verify records from the Favorites and Subscriptions object internally. Look for typos or missing data on a manually created favorite versus the automatically generated ones. Missing inputs on the CMDT records or typos will result in errors.
2. Knowledge Articles contain specific ID's; use the manually created records in Favorites and Subscriptions as a guide.
3. Network Name is the Name of the Community label, in the Favorites and Subscriptions record it's the Community Network ID.

Custom Metadata Type: Favorite Icon Mappings

Administrators can choose to leverage custom icons for Favorites on the Community Favorites Manager in addition to the default icons provided with the package. To support this functionality, custom icon images should be uploaded to Salesforce as Static Resources with the file set to Public. Once loaded into Salesforce, an Administrator can map the custom icons using the Custom Metadata Type "Favorites Icon Mappings."

1. Navigate to your Custom Metadata Type Records via **Setup | Build | Develop | Custom Metadata Types**, or by searching for "Custom Metadata Types" in the Quick Find, and then click 'Manage Records' next to the "Favorite Icon Mappings" Custom Metadata Type.
2. Create records in the "Favorites Icon Mappings" Custom Metadata Type for *each* custom icon
 - a. The label should match API name of the object and is **CASE SENSITIVE**
 - b. The Icon Static Resource should match the name of the Static Resource you uploaded

Favorite Icon Mapping Detail		Edit	Delete	Clone
Label	Knowledge__ka			
Favorite Icon Mapping Name	knowledge			
Icon Static Resource	 iconhappy			

FAQ

Question: Can we customize our email alert template?

Answer: Yes. However, we recommend using our Subscription Alert email template as an example of how to model the Visualforce code. Our Subscription Alert template is a great option for Users who are not comfortable modifying Visualforce code and would like to leverage the “Favorites and Subscriptions” Custom Setting to support the default template with minor customizations.

Question: Can we report on how many people are favoriting content and pages from a Community?

Answer: Yes, each Favorite or Subscription within the community creates a reportable record in the Favorites & Subscriptions custom object. Dashboards and an example report are provided with the package from the Fave&Follow Reports Dashboard folder.

Question: Can we report Favorites from multiple Communities?

Answer: Yes, each Favorite or Subscription within the community creates a reportable record in the Favorites & Subscriptions custom object. Segment by Network ID to see Favorites by Community if you have more than one Community.

Question: Can reports filter Favorites from Preloaded records?

Answer: Yes, each Favorite or Subscription record contains the Created Automatically ‘checkbox = true’ input when generated from the Preloaded Favorites automation.

Question: How can I test my Email Alert for Article Subscriptions or Archive on Hidden Articles?

Answer: From the Developer Console, run the following batch job:

```
Database.executeBatch(new SubscriptionEmailBatch());
```
