



Salesforce Communities Managers Guide

Salesforce, Summer '16



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MANAGE YOUR COMMUNITIES FOR SUCCESS

Monitoring and managing your community is the key to ensuring the community is a success.

This guide is intended to introduce you to the roles that help ensure a community is successful, and the tools that they can use to achieve that success.

Great communities don't just happen; there are many people involved, from the designer to the implementer to the developer who performs customizations. But once a community is up and running, the community manager and moderator are crucial to making sure it succeeds. These two roles combined help to ensure that the community is:

- Active: Members are logging in regularly
- Engaged: Members feel motivated to actively participate on a regular basis
- Healthy: Member are posting, commenting, and sharing appropriate and helpful information. Inappropriate information or files are removed.

COMMUNITY MANAGERS, MODERATORS, AND ADMINS WORKING TOGETHER

Communities can thrive when community managers, moderators, and admins understand their unique roles and work together effectively.

A community manager and moderator work hand-in-hand. They are partners and support one another in fostering engagement and harmony in the community. Sometimes, they perform some of the same tasks, but each has unique contributions. While the community manager is typically responsible for monitoring adoption and engagement, the moderator is typically responsible for ensuring the community is a healthy environment and that members feel encouraged to be active and helpful to each other.

Community managers, moderators, and admins all work together to protect, engage, and measure community success.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions



Prevent spammers, bots, and trolls from attacking the community.

Protect the community from trademark infringement and legal issues.

Ensure community members use appropriate language and adhere to the terms of use.



Welcome new members, add contributors, and connect members with resources.

Help ensure that members questions are answered quickly.

Acknowledge helpful members and thank them.

Identify, encourage, groom, and retain MVPs.



Review analytics on community health.

Measure return on investment (ROI) and key performance indicators (KPI), such as money saved and cases deflected.

Identify and track community trends.

[Assign a Community Manager](#)

To assign a user as a community manager, simply give them the “Manage Communities” permission.

[Assign a Community Moderator](#)

Make one or more people moderators in your community so they can keep an eye on its content.

Assign a Community Manager

To assign a user as a community manager, simply give them the “Manage Communities” permission.

Community managers must be employees of your organization; external community members can’t be community managers. To assign a user as a community manager, give them the “Manage Communities” permission. With this permission, they can access the Community Management page.

1. From Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the “Manage Communities” permissions.
3. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
4. Find the user you want to be a community manager and add the permission set to their Permission Set Assignments related list.

The user can now manage the community through Community Management.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To assign permission sets:

- “Assign Permission Sets”

Assign a Community Moderator

Make one or more people moderators in your community so they can keep an eye on its content.

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management. External users who are moderators can moderate within context of the community, such as directly in the community feed.

You can assign moderators by assigning a permission set that includes one or more of following moderation permissions.

Permission	Allows Users To
Moderate Communities Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Moderator options for feed content are available in the community feed and in Community Management.
Moderate Communities Files	Review flagged files they have access to and take action, such as removing flags or deleting the file. Moderator options for files are available on a file’s detail page and in Community Management.
Moderate Communities Chatter Messages	Review flagged messages and take action, such as removing a flag or deleting a message. This permission allows users access to only flagged messages in communities they’re a member of.
Can Approve Feed Post	Approve, delete, or edit posts that are pending review.
Moderate Community Users	Freeze external users who are members of the community. Moderators can freeze members on their user profile page or from an Insights report.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To assign permission sets:

- “Assign Permission Sets”

Permission	Allows Users To
Manage Communities	Moderate community content in Community Management.

You can also add these permissions to a profile. These permissions are valid for all communities the user is a member of, but don't apply in your internal organization.

1. From Setup, enter *Permission Sets* in the *Quick Find* box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the appropriate permissions.
3. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
4. Find the user you want to be a community moderator and add the permission set to their Permission Set Assignments related list.

After you grant moderator permissions to a user, keep these things in mind:

- The user can now moderate any items they have access to in all communities they're a member of.
- The user can flag items even if *Allow members to flag content* is disabled in a community.
- Moderators can receive an email notification when a post, comment, or file is flagged by selecting the *Flag an item as inappropriate* email notification.

Access to moderator functionality is slightly different depending on user permissions:

- **In the community feed:** Both internal and external users with the "Moderate Communities Feeds" permission can view flag indicators directly in the community feed for posts and comments and decide to either remove the flags or delete the content.
- **In Community Management:** Only internal users with the "Manage Communities" or "Create and Set Up Communities" permission can access the **Moderation** area in Community Management.

THE ONE-STOP SHOP: COMMUNITY MANAGEMENT

Community Management Overview

Community Management is a central place for setting up and managing your community. You can manage basic setup information including membership and branding, dashboards, reputation levels and points, and topics.

Community Management gives community administrators, managers, and moderators a central place to monitor the health of their community and its members.

 **Important:** The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration > Preferences** and enable **Show all settings in Community Management**.

Access Community Management

Community administrators and managers use Community Management to monitor community activity, and set up other important management features.

1. Access Community Management in one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click  in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click **Community Management**.
 - From Setup, enter *All Communities* in the Quick Find box, then select **All Communities** and click the **Manage** link next to a community. To access this page, you need the Create and Set Up Communities" permission.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
2. Choose the part of the community you want to manage:
 - Preview the community or access your community's settings in the Community Builder, Force.com, or Site.com Studio from the Community Management menu in the global header.
 - In **Engagement**, you can view Insights reports and take action on activity in your community.
 - In **Dashboards**, you can view community dashboards and reports.
 - In **Moderation**, you can set up moderation rules and monitor flagged feed items.
 - In **Topics**, you can manage navigational and featured topics.
 - In **Recommendations**, you can set up custom recommendations to appear in your community.
 - In **Reputation**, you can set up reputation levels and points.
 - In **Administration**, you can customize your community properties, such as name, description, URL, status, and template. You can also update your community settings, such as members, tabs, branding, login and registration, and emails.

 **Important:** The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration > Preferences** and enable **Show all settings in Community Management**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To access Community Management:

- "Manage Communities" OR "Create and Set Up Communities"
- AND is a member of the community whose Community Management page they're trying to access

To customize administration settings or use Community Builder:

- "Create and Set Up Communities"
- AND is a member of the community whose Community Management page they're trying to access

Get Started with Communities Dashboards and Insights

Dashboards in Community Management provide essential reports for managing your communities. Insights help you drill down to the source of activity and take action.

Let us do the hard work for you!

1. Install the [Salesforce Communities Management package](#) and get preconfigured dashboards and Insights.
2. Check out your new mapped pages. Click **Dashboards** and **Engagement** in Community Management.

Don't be afraid to customize the preconfigured dashboards and Insights to fit your community's needs. You can edit the source reports or dashboards at any time.

Alternatively, create your own dashboards and Insights.

1. Create [custom dashboards](#) and [custom Insights](#).
2. Map those [dashboards](#) and [Insights](#) in Community Management.

Report on Communities with the Dashboards and Insights Package

The Salesforce Communities Management package gives community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Community Management.

Use the Salesforce Communities Management package to:

- View the latest metrics and rapidly spot trends
- Determine how fast your community is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas in your community that need attention
- Take immediate action on recent activity with Insights reports

 **Note:** To use the preconfigured Insights reports, your community must use Chatter.

Install one of the following versions from the AppExchange:

- [Salesforce Communities Management \(for Communities with Chatter\)](#)
- [Salesforce Communities Management \(for Communities without Chatter\)](#)

 **Tip:** For installation instructions, detailed information about the reports, and upgrade instructions, see [Get Started with the Communities Management AppExchange Package](#).

During installation, dashboard and report folders are automatically installed in your internal org. You'll also have the option to give your community managers access to the package contents so you don't have to share the dashboard and report folders with them later. If you have no previous Insights or dashboards mapped in Community Management, they are automatically mapped for you during installation.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Community Management, community-specific data is displayed. After installation, here's what you see in Community Management.

Navigation Section	Page Name	Description	Requires Chatter
Dashboards	Home	Stay informed about recent activity or membership. This dashboard is mapped to your Community Management home page.	
	Overview	See the overall state of your communities at a glance. 90-day trending reports show total membership, newly joined members, and member logins. If you have Chatter enabled, 90-day snapshots show post and comment metrics.	
	Activity	See metrics about posts, comments, daily unique contributors, and which types of members are contributing posts and comments.	

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To install AppExchange packages:

- "Download AppExchange Packages"

Navigation Section	Page Name	Description	Requires Chatter
	Custom Recommendations	See how your community's custom recommendations are doing and how often the recommendations are viewed, clicked, or dismissed. You can view data for individual recommendations or across channels.	✓
	Files	Track content uploads, downloads, engagement, and content creators.	✓
	Groups	Monitor membership and post and comment activity within groups, one of the top drivers of community success.	✓
	Members	Gauge membership growth and see login metrics for the last 30 days.	
	Moderation	Track flagged content in your community.	✓
	Q & A	Review metrics about questions, answers, and best answers posted in your groups.	✓
	Self-Service	See metrics about questions, answers, and best answers posted in your user profiles. This dashboard is great for communities using the Napili template.	✓
	Topics	See metrics about the navigational and featured topics in your community.	✓
Engagement	Adoption	Monitor member activity and help drive adoption in your community.	✓
	Engagement	Track posts and comments in groups and see which members are truly engaged in your community.	✓
	Files	Monitor file uploads and downloads, including files receiving a lot of comments.	✓
	Groups	Helps you identify groups with deactivated or inactive owners and also groups that have been or will be archived soon.	✓
	Moderation	Track flagged posts, files, messages, and content flagged by moderation rules in your community.	✓
	Self-Service	Track questions and answers in user profiles, including questions escalated to cases. This Insights page is great for communities using the Napili template.	✓
	Topics	Keep an eye on recent topic activity in your community.	✓

The dashboards and reports provided in the package are 100% customizable. Don't be afraid to customize and change what you get in the package. You won't hurt our feelings. As newer versions of the package become available, you can upgrade your package by reinstalling it. If you customized any of the reports and dashboards, fear not; your customizations are retained during upgrade.

Insights for Community Engagement

Insights are reports that help your community managers monitor activity and take action on that activity. Insights make it easier to manage day-to-day moderation tasks, encourage community engagement, and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups, trending topics, and even recent Chatter contributions.

 **Example:** With an Insights report set up to track new members, community managers can quickly navigate to a new member’s profile to send them a welcome message.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

Adoption

New Members By Posts Refresh Edit Report

All Time From To

Filtered by Chatter Activity: Last Login

Member	Last Login	# Posts +	# Comments	# Comments Received
 Eric Ware	11/13/2015 2:06 PM	17	10	0
 Joe Smith	11/6/2015 1:43 AM	15	7	0

They can also access other reports about members directly from the Insights page using the drop-down menu.

Adoption

New Members Refresh Edit Report

- New Members
- Recent Contributors
- Recent Logins
- Top Active Members By Comments
- Top Active Members By Comments Received
- Top Active Members By Influence
- Top Active Members By Likes Received
- Top Active Members By Posts
- Top Contributors Inactive For 7+ Days
- Top Influencers Inactive For 7+ Days
- Top New Members By Comments
- Top New Members By Comments Received
- Top New Members By Influence
- Top New Members By Likes Received
- Top New Members By Posts
- Top New Members By Total Contributions

Date	Last Login	Last Chatter Activity
7/27/2015 3:10 PM	-	-
7/20/2015 4:13 AM	-	-
7/20/2015 4:12 AM	-	-
7/20/2015 4:11 AM	-	-
7/20/2015 4:01 AM	-	-
7/20/2015	7/20/2015 3:59 AM	-
7/20/2015	7/20/2015 3:57 AM	-

 **Tip:** Let us do the setup work for you! Get out-of-the-box Insights in the [Salesforce Communities Management package](#) available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter.

Insight reports provided in the package are 100% customizable. You can change the default Insights page names, report folder mappings, and even the Insights report columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

[Enable and Map Insights for Community Managers](#)

Community managers can use Insights reports to monitor recent activity and take action on that activity. To get up and running quickly, use preconfigured Insights from an AppExchange package. You can also create and map your own. Each community can have their own Insights.

[Create Insights to Display in Community Management](#)

You can create your own Insights to display in Community Management. We recommend that you create your Insights reports based on custom report types available for communities.

[Create Custom Actions for Community Management Insights](#)

Do more with community Insights reports with custom actions. Say a spammer attacks your community. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

[View and Customize Insights in Community Management](#)

Use Insights in Community Management to monitor recent community activity and immediately take action. Insights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your community.

Enable and Map Insights for Community Managers

Community managers can use Insights reports to monitor recent activity and take action on that activity. To get up and running quickly, use preconfigured Insights from an AppExchange package. You can also create and map your own. Each community can have their own Insights.

Insights pages map to report folders in your internal org. All the reports included in that folder are displayed in the drop-down menu on the Insights page. Adding or removing an Insights report from the report folder in your internal org updates the Insights page in Community Management. On the Insights page, links are automatically created for report fields such as `Created By` or `Group Name`. For posts, comments, and messages, you can even see the contents directly on the page.



Tip: Get out-of-the-box Insights in the [Salesforce Communities Management package](#) available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter.

When you install the package, report folders are automatically installed in your internal org. If you have no previous Insights mapped, the package automatically maps them for you. You can change the default mappings at any time.

Use the following steps to map or update your Insights in Community Management:

1. [Open Community Management](#).
2. Click **Engagement > Settings**.
3. Provide a name for each Insights page and then select the report folder you want to map to the page.

You can have up to 10 Insights pages mapped in Community Management.

Make sure that you have shared the mapped report folder with your community managers or they won't be able to view the Insights reports.

4. Click **Save**.

Insights pages are visible to community managers when they expand the **Engagement** section of Community Management.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To map Insights in Community Management:

- "Manage Communities"
OR "Create and Set Up Communities"

AND

"Manage Reports in Public Folders"

AND

Is a member of the community whose Community Management page they're trying to access

Go check out your changes. Click **Engagement** and then click each Insights page name. Use the drop-down menu to verify the reports mapped to each page.

If you installed the Salesforce Communities Management package, moderation-related Insights reports are also mapped to pages in the **Moderation** section of Community Management. Unlike the page names in the **Engagement** section, the page names in the **Moderation** section can't be renamed or unmapped.

Create Insights to Display in Community Management

You can create your own Insights to display in Community Management. We recommend that you create your Insights reports based on custom report types available for communities.

 **Tip:** Get out-of-the-box Insights in the [Salesforce Communities Management package](#) available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter.

Use the following process to create Insights to display in Community Management:

1. Create custom report types based on the Networks object.

Only reports that are based on the Networks object show community-specific information in Community Management.

 **Note:** You can create reports based on other objects and expose them in Community Management. Just keep in mind that they show data from across your organization, not just for the community in which you're viewing them.

- Select Networks as the primary object.
- Select a child object:
 - Chatter Messages
 - Feed Revisions
 - Groups
 - Network Audits
 - Network Activity Daily Metrics
 - Network Feed Revisions
 - Network Members
 - Network Membership Daily Metrics
 - Network Moderations
 - Network Public Usage Daily Metrics
 - Network Unique Contributor Daily Metrics
 - Recommendation Metric
 - Topic Assignments
 - Topics
 - Unpublished Feed Entities

2. Use the custom report type to create an Insights report.

Insights reports are just like any other report, except they must also meet the following requirements:

- The report can only be a tabular-based report.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To create custom report types:

- "Manage Custom Report Types"

To create, edit, and delete reports:

- "Create and Customize Reports"

To create and share report folders:

- "Manage Reports in Public Folders"

- The report can't include pagination.
- We recommended that your report only return 2,000 rows or less because only the first 2,000 rows are displayed in Community Management.

Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

3. Save the report to a new report folder that you'll use for mapping in Community Management.

We recommend that you create a separate report folder for each of your Insights pages. For example, create one report folder called *Insights Members* and another called *Insights Moderation*.

Insights pages map to report folders in your internal org. All the reports included in that folder are displayed in the drop-down menu on the Insights page. Adding or removing an Insights report from the report folder in your internal org updates the Insights page in Community Management.

4. Share your Insights report folder with your community managers.
5. In [Community Management](#), click **Engagement** > **Settings** to map Insights pages to your report folder.

When a community manager accesses Community Management, the Insights reports appear in the drop-down menu on the mapped **Engagement** page.

Create Custom Actions for Community Management Insights

Do more with community Insights reports with custom actions. Say a spammer attacks your community. You can create and use a custom action to remove all the spammer's posts and comments with just one click. Custom Insights actions work with standard objects and custom objects.

When you click an Insights action in the report, behind the scenes a Visualforce page drives the action. The Visualforce page links to standard or custom objects using standard controllers or standard list controllers.

Here are the high-level steps of how to create a custom Insights action:

1. Create a Visualforce page.

There are a few options you can use:

- Use a standard controller

Choose this option to create a Visualforce page that contains the same functionality and logic used in standard Salesforce pages. For example, if you use the standard Accounts controller, clicking a **Save** button in a Visualforce page results in the same behavior as clicking **Save** on a standard Account edit page.
- Use a standard list controller

Choose this option to create a Visualforce page that can display or act on a set of records. Examples of existing Salesforce pages that work with a set of records include: list pages, related lists, and mass action pages.
- Use a controller extension that uses Apex

Choose this option if you want to expose new functionality, customize the navigation through an application, use callouts or Web services, or if you need finer control for how information is accessed for your page.

All options work with standard objects and custom objects.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To create, edit, and set version settings for Visualforce pages:

- "Customize Application"

To edit custom Visualforce controllers:

- "Author Apex"

For detailed information about these options, see the Visualforce Developer Guide.

2. Add your custom action to the Insights report.

Actions are displayed based on the data returned in the report. Make sure that you have a report that is currently returning the data your action needs.

- a. In Community Management, navigate to the Insights report that you want to apply your new custom action to.
- b. On the report, click  and then add your custom action from the picklist.

3. Ensure that your users have the correct permissions to complete your custom action.

Depending on how you set up your custom action, after the action is executed, the user either stays on the Insights page or is redirected to a page in your internal org. Unlike our standard Insights actions, users don't receive the standard success or failure message for custom actions.



Example: Here's an example of a custom action to delete all activity from a community member. This custom action is great for cleaning up the community after a spam attack.

Create a custom controller extension using an Apex class and use it in your Visualforce page. The following `DeleteAllActivityControllerExtension` class is an example of a custom controller extension.

```
public with sharing class DeleteAllActivityControllerExtension {

    private List<Id> ids;
    private String retURL;
    private Database.DeleteResult[] deleteResult = null;
    private Map<String, String> resultMap;
    private String success = 'success';
    private String failure = 'failure';

    public DeleteAllActivityControllerExtension(ApexPages.StandardController controller)
    {
        resultMap = new Map<String, String>();
        /* The IDs you select on the Insights page are stored in a comma separated
string of IDs.
        This string is passed in a parameter called "idsList" */
        String idsList = ApexPages.currentPage().getParameters().get('idsList');
        //The return URL to the Insights page is passed in a parameter called "retURL"

        retURL = ApexPages.currentPage().getParameters().get('retURL');
        ids = idsList.split(',');
    }

    public PageReference deleteAllActivity() {
        deleteFeedPosts();
        deleteFeedComments();
        //Include these two lines of code to be redirected to the Insights page after
you click the action.
        PageReference retPage = new PageReference(retURL);
        retPage.setRedirect(true);
        Integer failureCount = calculateFailureCount();
        Integer successCount = ids.size() - failureCount;
        retPage.getParameters().put(success, String.valueOf(successCount));
        retPage.getParameters().put(failure, String.valueOf(failureCount));
        return retPage;
    }
}
```

```

    }

    private void deleteFeedPosts() {
        List<FeedItem> feedItems = [Select Id, CreatedById FROM FeedItem WHERE
CreatedById IN :ids];
        deleteResult = Database.delete(feedItems, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedItems.get(i).CreatedById),
failure);
                    }
                }
            }
        }
    }

    private void deleteFeedComments() {
        List<FeedComment> feedComments = [Select Id, CreatedById FROM FeedComment WHERE
CreatedById IN :ids];
        deleteResult = Database.delete(feedComments, false);
        //Update the resultMap with failures to calculate the failureCount
        if(deleteResult != null) {
            for(Integer i=0;i < deleteResult.size();i++) {
                if (!deleteResult.get(i).isSuccess()) {
                    for(Database.Error error : deleteResult.get(i).getErrors()) {
                        resultMap.put(string.valueOf(feedComments.get(i).CreatedById),
failure);
                    }
                }
            }
        }
    }

    private Integer calculateFailureCount() {
        Integer failureCount = 0;
        for (String result : resultMap.values()) {
            if (failure == result) {
                failureCount++;
            }
        }
        return failureCount;
    }
}

```

This code creates a **Delete All Activity** button in your Insights report. This button deletes all posts and comments for any selected members. If you wanted to delete all private messages and files too, you could expand the code.

 **Note:**

- This code example doesn't include any permission checks. This custom action only works for admins.

- The IDs for the items you selected on the Insights report are passed to the Visualforce page using the `idsList` parameter.

The following Visualforce markup shows how the custom controller extension can be used in a page:

```
<apex:page standardController="User"
extensions="DeleteAllActivityControllerExtension" action="{!deleteAllActivity}"
/>
```

View and Customize Insights in Community Management

Use Insights in Community Management to monitor recent community activity and immediately take action. Insights help you manage day-to-day moderation tasks and keep up on adoption and engagement in your community.

Each Insights page includes multiple Insights reports. You can access these reports using the drop-down menu on the page. On the Insights page, links are automatically created for report fields such as `Created By` or `Group Name`. For posts, comments, and messages, you can even see the contents directly on the page.

Insights are powerful tool that you can use to perform mass-actions. For example, if a spammer attacks your community, you can select all the offending posts and click **Delete Post**.

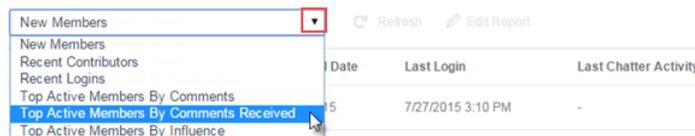
Important: Some Insights actions require special permissions. If you can't perform an action, let your admin know.

1. [Open Community Management](#).
2. Click **Engagement** or **Moderation**.

Note: Your admin maps Insights pages. If the **Engagement** section isn't visible or the **Moderation** section doesn't include any Insights pages, your admin hasn't mapped them yet.

Pages with mapped report folders appear when you expand the sections.

3. Click the Insights page you want to view.
 - To access other Insights reports, use the drop-down menu.



- Take action! Only the first two actions are displayed on the page. To see more actions, click next to the displayed actions. You can select up to 100 rows at a time.
- To filter the report by relative and custom date ranges, use the drop-down date filter. Select one of the following relative date ranges: All Time, This Week, This Month, Last Month, Today, Yesterday, Last 7 Days, and Last 30 Days. You can also enter your own custom date range.
- To sort the report by a specific column, click the column heading. An arrow on the column indicates whether the report is sorted by ascending or descending order.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view Insights in Community Management:

- "Manage Communities" OR "Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access

To customize Insights reports:

- "Create and Customize Reports"

- To edit or customize the report, click  to open the report in your internal org. From there you can customize the report to fit your community needs, such as adding or removing columns and updating the report filters.

Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

- To edit the actions assigned to a page, click  to open the Edit Insights Actions page.

Actions that appear on the Insights report are displayed based on the data returned in the report. For example, if the report returns data about a user, the **Freeze Member** and **Unfreeze Member** actions are displayed. If the report stops returning data, actions aren't removed. However, when you go to update the actions, we let you know that some are no longer appropriate.

Each Insights report can have its own actions. You can edit these actions at any time, but keep in mind that an Insights report must have at least one action. Actions displayed in the picklist on the Edit Insights Actions page are all the available and appropriate actions for your report, including custom actions.

Insights reports in Community Management are automatically refreshed when you access them. You can also force an update.

Measure Community Success with Dashboards

Use Community Management dashboards to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement, providing you with a high-level view into the health of your community. Dashboards also help you monitor return on investment (ROI) and key performance indicators (KPI).

[Enable and Map Dashboards for Community Managers](#)

Community managers can use dashboards to measure the success of their communities. You can even map a dashboard to the Community Management **Home** page. You can map custom dashboards or use ones provided in an AppExchange package. Each community can have its own dashboards.

[Create a Dashboard to Display in Community Management](#)

While you can show any dashboard in Community Management, we recommend creating them based on the custom report types available for communities.

[View Dashboards in Community Management](#)

Use the dashboards in Community Management to monitor the health of your community.

[What's the difference between Insights and dashboards?](#)

Insights let you take immediate action on recent activity in your community, and dashboards let you see trends.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Enable and Map Dashboards for Community Managers

Community managers can use dashboards to measure the success of their communities. You can even map a dashboard to the Community Management **Home** page. You can map custom dashboards or use ones provided in an AppExchange package. Each community can have its own dashboards.

You can choose to map any dashboard you have access to, but ensure that your community managers have access as well.

All dashboards in Community Management display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard in Community Management. Remember that although dashboards render in a Lightning view in Community Management, the Communities product isn't supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a [supported browser](#).

 **Tip:** Keep in mind that you can get preconfigured dashboards in the [Salesforce Communities Management package](#) available for download on the AppExchange.

If the Salesforce Communities Management package is installed in your organization, each of the dashboard pages has a default mapping to a dashboard from the package. You can overwrite these values as needed.

Use the following steps to map or update your dashboards in Community Management:

1. [Open Community Management](#).
2. Click **Dashboards > Settings**.
3. For each of the pages, select the dashboard you want to show to community managers. The dashboard you map to **Home** displays on your Community Management **Home** page.
4. Click **Save**.

Dashboards are visible to community managers when they expand the **Dashboards** section or visit the home page in Community Management.

Verify the dashboard mappings by clicking **Dashboards** and then clicking each page name. If you mapped a dashboard to the **Home** page, check that out too.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To map dashboards in Community Management:

- "Create and Set Up Communities" OR "Manage Communities"

AND

"Manage Dashboards in Public Folders"

AND

Is a member of the community whose Community Management page they're trying to access.

Create a Dashboard to Display in Community Management

While you can show any dashboard in Community Management, we recommend creating them based on the custom report types available for communities.

 **Tip:** Keep in mind that you can get preconfigured dashboards in the [Salesforce Communities Management package](#) available for download on the AppExchange.

All dashboards in Community Management display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard in Community Management. Remember that although dashboards render in a Lightning view in Community Management, the Communities product isn't supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a [supported browser](#).

Use the following process to create dashboards to display in Community Management:

1. Create custom report types based on the Networks object.

Only reports that are based on the Networks object show community-specific information in Community Management.

 **Note:** You can create reports based on other objects and expose them in Community Management. Just keep in mind that they show data from across your organization, not just for the community in which you're viewing them.

- Select Networks as the primary object.
- Select a child object:
 - Chatter Messages
 - Feed Revisions
 - Groups
 - Network Audits
 - Network Activity Daily Metrics
 - Network Feed Revisions
 - Network Members
 - Network Membership Daily Metrics
 - Network Moderations
 - Network Public Usage Daily Metrics
 - Network Unique Contributor Daily Metrics
 - Recommendation Metric
 - Topic Assignments
 - Topics
 - Unpublished Feed Entities

2. Use the custom report type to create a report.

Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

3. Create a dashboard with components. Select the report as your source type.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To create custom report types:

- "Manage Custom Report Types"

To create, edit, and delete reports:

- "Create and Customize Reports"

To create and share dashboards:

- "Manage Dashboards in Public Folders"

- Add a component for each report you want to include in your dashboard.
- Find your report on the Data Sources tab and add it to the component.

In order for a Salesforce Classic dashboard to optimally render in the Lightning view used in Community Management, make sure that your dashboard meets the following requirements:

- Includes only up to 20 reports arranged within three columns
- Doesn't include unsupported charts, such as funnel, scatter, table, multi-metric, pie, and gauge

For a list of dashboard features not supported in the Lightning view, see [Reports and Dashboards: Lightning Experience Limitations](#).

 **Note:** Metrics are supported in the Lightning view, but they display as large tiles. We recommended that you don't include metrics in your dashboards.

4. Share the folder that you save your dashboard in with your community managers.
5. In [Community Management](#), click **Dashboards** > **Settings** to map your dashboard.

When a community manager accesses Community Management, the dashboard appears under **Dashboards**. If you mapped a dashboard to the **Home** page, the dashboard appears there.

Dashboards in Community Management are automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it in Community Management. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

Remember that you can customize your dashboards at any time. To edit your dashboard, go to the **Dashboards** > **Settings** page in Community Management and click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link won't work.

View Dashboards in Community Management

Use the dashboards in Community Management to monitor the health of your community.

All dashboards in Community Management display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard in Community Management. Remember that although dashboards render in a Lightning view in Community Management, the Communities product isn't supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a [supported browser](#).

1. [Open Community Management](#).
2. Click **Dashboards**.

 **Note:** Your administrator maps the dashboards. If the **Dashboards** section isn't visible, they haven't been mapped for your community.

Pages that have dashboards mapped to them appear in the **Dashboards** section or on the **Home** page.

3. Click the dashboard page you want to view.

The dashboard appears. For an immediate refresh of dashboard data, click **Refresh**.

Dashboards in Community Management are automatically refreshed every 24 hours. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. If the dashboard hasn't been refreshed in 24 hours, it's refreshed automatically when you access it in Community Management. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

4. To view a related report, click **View Report** on the dashboard.

Remember that the dashboards are configured to display community-specific data.

Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

Remember that you can customize your dashboard at any time. To edit your dashboard, go to the **Dashboards > Settings** page in Community Management and click **Edit dashboard** to open the dashboard in your internal Salesforce org. If you're using a dashboard that was created in Lightning Experience, the edit link won't work.

What's the difference between Insights and dashboards?

Insights let you take immediate action on recent activity in your community, and dashboards let you see trends.

Use **Engagement** to view, monitor, and act on your community's activity. Insights give you a detailed look at a specific area of your community.

Use **Dashboards** to view your community's metrics, such as trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you monitor return on investment (ROI) and key performance indicators (KPI).

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view dashboards in Community Management:

- "Manage Communities"

OR

"Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

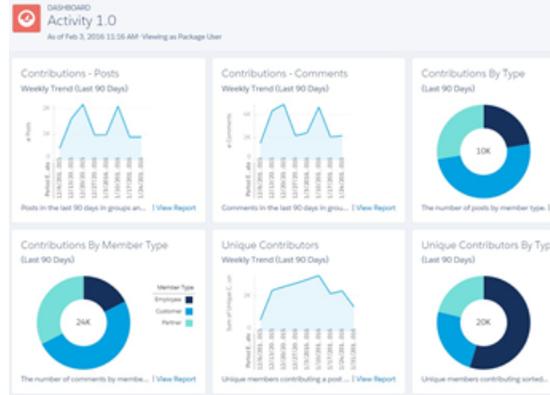
Adoption

Active Members

Custom From 2/20/16 To 2/20/16

Filtered by Chatter Activity Last Login

Member	Last Login	# Posts	# Comments	# Comments Received	# Likes Received
Eric Hale	2/20/16 1:10 PM	37	20	5	4
John Luke	2/20/16 3:10 PM	1	1	0	1
Ashwari	2/20/16 4:11 AM	3	1	1	2
Nice Gemini	2/20/16 12:04 AM	1	0	0	0
Mike Davis	2/20/16 3:49 AM	3	1	2	1
Stephen Hu	2/20/16 3:52 AM	1	0	0	0
Shanki Das	2/20/16 3:12 AM	2	0	1	1
Alex Pankov	2/20/16 4:13 AM	1	0	0	0
Franklin Kammath	2/20/16 3:33 AM	1	1	0	0
Vinay Choudh	2/20/16 3:55 AM	1	0	0	0
Pranav Rathananathan	2/20/16 3:30 AM	2	1	1	0
Johnnie Lee	2/20/16 3:10 AM	1	1	0	0
Daniel Vora	2/20/16 2:49 AM	1	0	0	0



For example, you can visit the **Engagement > Adoption** page to view a report about new members in your community that have received the most likes on their posts and comments. This Insights report helps you identify and engage with your active new members that are receiving positive feedback from other community members.

For example, you can visit the **Dashboards > Activity** page to track total posts and comments including overall contribution trends in your community.

Community Moderation Strategies and Tools

Community moderation allows you to empower members of your community to monitor content and ensure that it's appropriate and relevant. Set up rules to automate moderation and do the heavy lifting for you.

Moderation is crucial for a community to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your community are appropriate and helpful. You also need to empower members to speak up when they view something as inappropriate or offensive.

With Communities moderation, you can:

- Designate specific users as moderators so that they can closely monitor the community
- Allow members to flag posts, comments, files, and messages that are inappropriate
- Allow moderators to review and act on flagged items, such as deleting a post, comment, or file
- Allow group owners and managers to moderate within their groups
- Create rules and criteria to automatically block, flag, replace keywords in member-generated content, such as posts or comments
- Create rules to review and approve content from specific members
- Track flagging and moderation activity within your community

To [limit the size and types of files allowed in your community](#), go to the **Administration > Preferences** page.

To report on moderation activity in your communities, you can use the preconfigured Audit Trail Insights report provided in Salesforce Communities Management package. You can also query the flagged content or activity using the API, or create a custom report type using `Networks` as the primary object. For more information about the Salesforce Communities Management package, see [Report on Communities with the Dashboards and Insights Package](#).

EDITIONS

Available in: **Salesforce Classic**

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

If your org is using Transaction Security, community moderation offers some of the same functionality. Transaction Security and communities moderation can be used at the same time.

[Enable Members to Flag Items in Your Community](#)

Turn on flagging for your community to empower members to flag posts, comments, files, and messages that they deem inappropriate.

[Community Moderation Criteria](#)

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

[Community Moderation Rules](#)

Create and modify rules for your community to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your community from spammers, bots, and offensive or inappropriate content.

[Review and Approve Posts in Your Community \(Beta\)](#)

Pre-moderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your community. Posts pending review aren't displayed in the community feed; only the author and community moderators can see pending posts in the feed. After you set up the rules, moderators can approve content in two places: directly in the community feed or in Community Management.

[Moderate Flagged Posts and Comments in Your Community](#)

Community moderators can review a list of posts and comments that members of the community have flagged as inappropriate and take action. Group owners or group managers, can view flags and take action on items in their groups.

[Moderate Flagged Files in Your Community](#)

Community moderators can review a list of files that members of the community have flagged as inappropriate and take action. Group owners or group managers can view flags and take action on files in their groups.

[Moderate Flagged Private Messages in Your Community](#)

Community moderators can review and act on a list of Chatter messages that members of the community have flagged as inappropriate or as spam.

[Set Up Apex Triggers for Flagging Items](#)

Use triggers to create custom advanced moderation logic that automatically flags items in your community.

Enable Members to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts, comments, files, and messages that they deem inappropriate.

Community moderation must be enabled for your organization before you can allow members to flag content in the user interface. If you don't see the option to allow flagged content, contact your administrator.

This setting isn't required to flag or moderate items using the API.

Once an item is flagged, your community moderator can review it and take action. Remember that moderators can continue to flag items even if flagging is disabled for community members.

1. [Open Community Management](#).
2. Click **Administration > Preferences**, then select `Allow members to flag content`.
3. Click **Save**.

With this setting enabled in a community:

- Members can flag posts, comments, and files using the `Flag as inappropriate` option.
- Members can flag messages from within the community on their `My Messages` page in Chatter. If a member has turned on email notification for messages, they can also flag the message directly from their email. Members can only flag messages that are sent from communities they are members of.

 **Note:** Messages can't be flagged in partner or customer portals, your internal organization, or from Salesforce1.

- Group owners and managers can moderate groups they own or manage.

If you want to create custom advanced moderation logic for your community, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

Community Moderation Criteria

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Plan Your Use-Cases

Before creating your member criteria, think about what you want to do.

- Do you want to protect your community from bots and spammers? Most spammers attack shortly after they've joined. Set up member criteria based on a user's creation date.
- Do you want to review members' first posts? Set up member criteria that targets users without community contributions.
- Do you want to moderate your internal users' activity in your community? Set up member criteria to include only your internal users.
- Do you want to be notified when a partner contributes for the first time? Set up member criteria to include only your partner users that don't have community contributions.

Before creating content criteria, think about what you want to moderate.

- Do you want to moderate profanities and slang? Set up separate keyword lists for each group of related words.
- Do you want to replace competitor product names with asterisks? Create a keyword list just for your competitor products.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To enable users in your community to flag items:

- "Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

- Do you want to monitor content for HIPAA compliance? Create a keyword list that alerts of possible HIPAA violations.

Create Content Criteria to Moderate Your Community

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your community. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

Create Member Criteria to Moderate Your Community

Create and modify member criteria to use in community moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the community. Use member criteria in your rules to help pin-point specific use-cases, like reviewing posts only from your customer users who were created in the last 7 days.

Create Content Criteria to Moderate Your Community

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your community. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

You can also use the Metadata API or Tooling API to set up keyword lists.

Some things to keep in mind:

- Your org can have up to 30 keyword list criteria. This limit is per org, not per community.
- A keyword list can have up to 2,000 keywords.
- Capitalization and trailing punctuation are ignored when matching your keywords to user-generated content. For example, if your criteria includes *BadWord*, it's matched when a user types *BADWORD* or *badword*.

Set up content criteria to use in your moderation rules:

1. [Open Community Management](#).
2. Click **Moderation** > **Content Criteria**, then click **New**.
3. Enter a name, unique name, and description for your criteria.
4. Click **Save**.
5. Update the keywords in your criteria.

To add keywords, click **Add**.

- Keywords can only be up to 100 characters and can include letters, numbers, spaces, and special characters.
- Wildcard characters aren't supported.
- Separate keywords with commas or line breaks.
- When adding keywords, you can copy and paste up to 32,000 characters at a time.

 **Tip:** To cover different variations of the same word, you can use special characters and spaces. For example:

bad-word

b@dword

b a d w o r d

To delete keywords, select the keywords you want to remove, then click **Delete**.

EDITIONS

Available in: **Salesforce Classic**

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete criteria:

- "Manage Communities"
OR "Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

A message indicates how many keywords were added or failed to add, and the number of duplicates that were ignored. If your entire entry failed to save, review the keyword requirements and then submit again. Don't worry about adding duplicates because they're ignored.

To delete criteria, click **Del** from the **Content Criteria** page. If criteria is being used by a rule, you can't delete it.

Create Member Criteria to Moderate Your Community

Create and modify member criteria to use in community moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the community. Use member criteria in your rules to help pin-point specific use-cases, like reviewing posts only from your customer users who were created in the last 7 days.

Some things to keep in mind:

- Your org can have up to 100 member criteria. This limit is per org, not per community.
- Each member criteria can include up to 100 user conditions.

You can create criteria that includes only user types and user profiles, or just filters. Or if you want it all, your criteria can include user types, user profiles, and filters. Let's get started.

1. [Open Community Management](#).
2. Click **Moderation > Member Criteria**, then click **New**.
3. Enter a name, unique name, and description for your criteria.
4. Select the types of user types or user profiles to include in your criteria.

You can select any combination of types and profiles. Members are included when they belong to *any* one of your selections.

If you delete a profile in your internal org, the profile is also removed from your member criteria.

5. Select to filter your members by:
 - **None**—Select this option if you don't want to filter the criteria using the other options. None is the default selection.
 - **User creation date**—Select this option to include only users that were created within a specific time frame. Enter the number of days since the user was created.

 **Note:** A user's creation date might not be the same date they became a member of the community. For example, you can have an internal user that was created 120 days ago who became a member of the community 5 days ago. For users that self-register, their creation date is the date they become a member of the community.

 - **Members without community contributions**—Select this option to include only members that haven't posted or commented in the community. Posts that are pending review don't count as community contributions until they are approved.

If you selected user types or user profiles, and you also select filter conditions, members are included only if they belong to one of the selected user types or profiles *and* the filter condition.

6. Click **Save** to apply your changes.

 **Example:** Let's look at the following conditions:

User Types: Partner

User Profiles: Customer Community Plus Login User, Customer Community Plus User, and Customer Community User

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete criteria:

- "Manage Communities" OR "Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

Filter By: User creation date is set to 7 days since the user was created

This member criteria applies to:

- Partner users created in the last 7 days
- Customer Community Plus Login User created in the last 7 days
- Customer Community Plus User created in the last 7 days
- Customer Community User created in the last 7 days

You can use this member criteria in a rule to:

- Review and approve their posts
- Be notified of their contributions
- Flag all their contributions

To delete criteria, click **Del** from the **Member Criteria** page. If criteria is being used by a rule, you can't delete it.

Community Moderation Rules

Create and modify rules for your community to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. Moderation rules help protect your community from spammers, bots, and offensive or inappropriate content.

[Create Content Rules to Moderate Your Community](#)

Create and modify rules for your community to moderate member-generated content. Content rules protect your community from offensive language and inappropriate content created by spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

[Create Rate Limit Rules to Moderate Your Community](#)

Create and modify rate rules to monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

[How and when do community moderation rules execute?](#)

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Create Content Rules to Moderate Your Community

Create and modify rules for your community to moderate member-generated content. Content rules protect your community from offensive language and inappropriate content created by spammers or malicious members. You can create content rules that block, replace, flag, or allow you to review and approve member-generated content.

If your community is using the Napili template, moderation rules apply to questions and group posts created by your community members.

You can also use the Metadata API or Tooling API to set up content rules.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Each content rule can have up to three keyword criteria and 10 member criteria.
- Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content. If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content.

 **Tip:** Before creating a rule, we recommend you create criteria to use in the rule.

1. [Open Community Management](#).

2. Click **Moderation > Rules**, then click **New** and select **Content Rule**.

3. Complete the following fields:

- **Name**—Enter a name for your rule.
- **Unique Name**—Enter a unique name for your rule. The unique name used by the API.
- **Description**—Optionally, enter a description.
- **Activate Rule**—If selected, the rule is activated.
- **Applies To**—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
- **Moderation Action**—Specify what you want to happen when the criteria is matched.
 - **Block** prevents the content from being published.
 - **Review** allows users with the “Can Approve Feed Post” permission to approve the content before it's published.

 **Note:** The Summer '16 release contains a beta version of the pre-moderation feature, which means it's a high-quality feature with [known limitations](#). This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the [Community Implementation](#) group in the Success Community.

- **Replace** publishes the content with the keywords replaced as asterisks. For example, *BadWord* becomes *******.
- **Flag** publishes the content and then automatically flags the content as inappropriate.
- **Message for Member**—Specify the message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: “You can't use %*BLOCKED_KEYWORD*% or other inappropriate words in

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete rules:

- “Manage Communities” OR “Create and Set Up Communities”

AND

Is a member of the community whose Community Management page they're trying to access.

this community. Review your content and try again.” The `%BLOCKED_KEYWORD%` variable displays up to five blocked words. You can also use this variable in your own custom message.

 **Tip:** For international communities, you can translate this message. From Setup, enter *Translate* in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the community the rule belongs to.

- **Member Criteria**—Specify member criteria to enforce this rule. Ask yourself, who should this rule apply to?
- **Content Criteria**—Specify the content criteria to enforce this rule. Ask yourself, what specific keywords should this rule apply to?

 **Important:** Keep the following things in mind:

- If you activate a content rule without specifying member criteria, the rule applies to all members.
- If you activate a content rule without specifying content criteria, the rule either:
 - Prevents members from creating posts and comments entirely
 - Sends all posts for review
 - Flags all posts and comments
 Yikes! Be careful.
- If you select member criteria and content criteria, the rule applies only when both criteria are met.
- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

4. Click **Save** to apply your changes.

Create Rate Limit Rules to Moderate Your Community

Create and modify rate rules to monitor and limit how frequently member-generated content is created in your community. Rate rules protect your community against spammers and bots that attack your community by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

Each rate rule controls two actions: notification and freeze. You can set up your rate rule for both actions or just one. You can apply the rule to: posts, comments, files, and private messages. In Napili-based communities, this includes questions and answers.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per community. This limit includes both content rules and rate rules.
- Each rate rule can have up to 10 member criteria.

 **Tip:** Before creating a rule, we recommend you create member criteria to use in the rule.

1. [Open Community Management](#).
2. Click **Moderation > Rules**, then click **New** and select **Rate Rule**.
3. Complete the following fields:
 - **Name**—Enter a name for your rule.
 - **Unique Name**—Enter a unique name for your rule. The unique name used by the API.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view, create, edit, and delete rules:

- “Manage Communities” OR “Create and Set Up Communities”

AND

Is a member of the community whose Community Management page they’re trying to access.

- **Description**—Optionally, enter a description.
- **Activate Rule**—If selected, the rule is activated.
- **Applies To**—Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles.
- **Member Criteria**—Specify the member criteria to enforce this rule. Ask yourself, who do I want this rule to apply to? Spammers are typically new members. We recommend creating member criteria that only includes customer users that were created in the last 7 days.

 **Note:**

- Rate rules don't apply to internal users. You can use member criteria that includes internal users, but the rules just don't apply to them.
- If you activate a rate rule without specifying member criteria, the rule applies to all external users.

- **Content Creation Time Frame**—Select the time frame you want to use.
- **Notify Moderators**—Enter a number. Moderators are sent an email when a member creates this much content in your set time frame.
- **Freeze Members**—Enter a number. Members are frozen when they create this much content in your set time frame.

 **Important:** When members are frozen, they're frozen in all communities that they're a member of.

Emails are sent to users with the "Moderate Community Users" permission. Make sure that you assign your moderators this permission. Emails are sent even if a user has turned off Chatter emails.

4. Click **Save** to apply your changes.

 **Example:** Let's use the following rate rule as an example.

Applies To: Posts and private messages
Member Criteria: Customer users created in the past 7 days
Content Creation Time Frame: 3 minutes
Notify Moderators: 6
Freeze Members: 10

With this rate rule, here's what happens when a member reaches your limits.

In the span of 3 minutes, a member creates...	Is the moderator notified?	Is the member frozen?
4 posts and 2 private messages	✓	✗
6 posts	✓	✗
6 comments	✗	✗
8 posts and 2 private messages	✓	✓
10 posts	✓	✓
10 comments	✗	✗

A rate rule like this protects the community from spammers and bots but also allows you to help your new members. Maybe a non-threatening member posted a question over and over hoping to get it answered faster. Rate rules do more than protect—they help you reach out to members in need.

Here's a rule set up just for private messages.

`Applies To: Private messages`

`Member Criteria: Customer users created in the past 3 days`

`Content Creation Time Frame: 15 minutes`

`Notify Moderators: 1`

`Freeze Members: 3`

This rate rule protects the community from spammers that attack via private messages.

My rate rule didn't do anything. What's going on?

Give it time. Rate limit rules might not seem exact, but they are. Trust us. For example, say you set up a rate rule to freeze members when they create content 10 times in 3 minutes. It's possible for a member to create 9 items towards the end of the first 3-minute time frame. In this case, the member isn't frozen until they post another 10 items in the second 3-minute time frame.

Check the member criteria you're using. For example, let's say you have a rate rule that uses member criteria to filter for members without community contributions. After a member's first post or comment, the rule doesn't apply to the member anymore, so the member doesn't reach the freeze limit you set.

How and when do community moderation rules execute?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want community managers to review the original content. On the server, Salesforce executes community rules within the standard order of execution.

Rules that block content execute during system validation. Rules that block content ignore changes made by `before` triggers. For example, if a `before` trigger changes a feed post, a moderation rule that blocks content isn't aware of the changed content and executes on the original content.

Rules to review and approve content execute before database saves. These rules execute before rules that replace content.

Rules that replace content execute before database saves.

Rules that flag content execute after workflow rules.

Review and Approve Posts in Your Community (Beta)

Pre-moderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your community. Posts pending review aren't displayed in the community feed; only the author and community moderators can see pending posts in the feed. After you set up the rules, moderators can approve content in two places: directly in the community feed or in Community Management.

To set up a moderation rule to review and approve posts, go to **Moderation > Rules** and create a content rule that uses the **Review** action. Here are some ways that you can use rules to review content:

Self-Service Community

Does your community allow members to self-register? You can set up a rule to review and approve questions from all your self-registering users. Use member criteria that includes only your guest user profile and filters for members who were created in the past seven days.

Have spammers ever attacked your community? Use member criteria that includes only your guest user profile and filters for members that have never contributed to the community.

Partner Community

Want to ensure that your partners aren't discussing a recent acquisition or other sensitive transactions? You can set up a rule to review posts that include keywords such as "acquisition" or "merger."

Employee Community

Does your community require HIPAA compliance? Set up your rules to review posts from all your employees.

 **Note:** The Summer '16 release contains a beta version of the pre-moderation feature, which means it's a high-quality feature with [known limitations](#). This feature isn't generally available unless or until Salesforce announces its general availability in documentation or in press releases or public statements. We can't guarantee general availability within any particular time frame or at all. Make your purchase decisions only on the basis of generally available products and features. You can provide feedback and suggestions for this feature in the [Community Implementation](#) group in the Success Community.

Pending Review is displayed in the header of the post until it's approved. Remember that while a post is pending approval, the author of the post can still edit or delete it, however they can't comment on it. To prevent the author from editing the post, you can disable feed post editing for certain users.

There are two ways to review and approve posts in your community:

- Use a preconfigured Insights report in Community Management.

Use the Pending Insights report provided in the Salesforce Communities Management package. This report lets you see all the posts that are pending review in your community. The Insights report displays the contents of posts so you can quickly assess whether a post is spam or harmless. You can then approve or delete a post directly from the report. You can also perform mass-action and approve multiple posts at once.

To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see [Report on Communities with the Dashboards and Insights Package](#).
- Approve posts directly in the community feed.

In the community feed, users with the "Can Approve Feed Post" permission see an extra action in the drop-down menu of the post to **Approve** the content. If the post is inappropriate, they can delete it. If the post has a typo, they can edit it.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To approve, delete, or edit posts that are pending review in the community feed:

- "Can Approve Feed Post"

To approve, delete, or edit posts that are pending review in Community Management:

- "Can Approve Feed Post"

AND

"Manage Communities"
OR "Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

After the post is approved, the author of the post receives an email that lets them know the post is approved and provides a link to the post in the community. Email notifications, such as @mentions notifications, are only sent after the post is approved.

Moderate Flagged Posts and Comments in Your Community

Community moderators can review a list of posts and comments that members of the community have flagged as inappropriate and take action. Group owners or group managers, can view flags and take action on items in their groups.

Flagged posts and comments have a small orange flag next to the post or comment date. The number next to the flag indicates how many people have flagged the item. The moderator can review each item and decide whether to take action.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- Within a group in a community, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files if necessary.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged posts and comments:

- Use a preconfigured Insights report in Community Management.
Use the Flagged Posts and Flagged Comments reports provided in the Salesforce Communities Management package. These reports let you quickly manage your community's flagged posts and comments. You can see the content of the post or comment and then remove the flag or delete it. You can also select multiple items at once.
To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see [Report on Communities with the Dashboards and Insights Package](#).
- Use the flagged feed in Chatter.
If you're using a Salesforce Tabs + Visualforce community, you can see a list of flagged posts and comments using the Chatter menu in your community. The `Allow members to flag content` preference must be enabled to see the Flagged feed.



- Moderate using a custom list. You can expose a list of flagged posts and comments using the Chatter REST API or ConnectApi in Apex.
- Moderate directly within context of the community by removing flags or deleting content in the feed.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view flagged items, remove flags, and delete posts or comments:

- "Moderate Communities Feeds"

To moderate posts and comments in Community Management:

- "Moderate Communities Feeds"

AND

"Manage Communities"
OR "Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

 **Tip:** To receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

Moderate Flagged Files in Your Community

Community moderators can review a list of files that members of the community have flagged as inappropriate and take action. Group owners or group managers can view flags and take action on files in their groups.

Members of your community may post files that aren't appropriate because they contain sensitive information or offensive content. Other members of the community can flag these files for review. Flagged files have a small orange flag. The number next to the flag indicates how many people have flagged the item.

A few things to keep in mind:

- Moderators can only view and act on items they have access to.
- Within a group in a community, group owners and managers can review and remove flags on files in the groups they own and manage if `Allow members to flag content` is enabled for their community.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

There are a few ways you can moderate flagged files:

- Use a preconfigured Insights report in Community Management.
Use the Flagged Files report provided in the Salesforce Communities Management package. This report lets you see the name of the flagged file, who created it, who flagged it, and how many flags the file has. You can click a link to open the file and review the content. Then you can remove the flag or delete the file. You can also select multiple items at once.
To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see [Report on Communities with the Dashboards and Insights Package](#).
- Moderate using a custom list. You can expose a list of flagged files using the Chatter REST API or ConnectApi in Apex.
- Moderate directly within context of the community by removing flags or deleting content on the file detail page.

 **Tip:** To receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

To [limit the size and types of files allowed in your community](#), go to the **Administration > Preferences** page.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To view the file detail page, remove flags, and delete files:

- "Moderate Communities Files"

To moderate files in Community Management:

- "Moderate Communities Files"

AND

"Manage Communities"
OR "Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

Moderate Flagged Private Messages in Your Community

Community moderators can review and act on a list of Chatter messages that members of the community have flagged as inappropriate or as spam.

The “Moderate Communities Chatter Messages” permission allows users to see the contents of messages, remove flags, and delete messages only in communities they’re a member of. With this permission, only flagged messages can be deleted. The “Modify All Data” permission allows moderators to remove flags or delete a message in the SOAP API.

Ensure that your moderators are assigned the “Moderate Communities Chatter Messages” permission, *not* the “Manage Chatter Messages” permission. The “Manage Chatter Messages” permission allows users to see *all* the messages in your entire Salesforce org. Avoid security and privacy concerns; double-check that your moderators and managers have the right permission.

 **Important:** Keep these limitations in mind:

- Community members can’t flag messages sent from communities that they aren’t a member of or that haven’t turned on flagging for their users.
- Users can’t flag messages in your internal organization, in Salesforce1, or in partner and customer portals.

There are a few ways to monitor and manage flagged messages in your communities:

- Use a preconfigured Insights report in Community Management.
Use the Flagged Private Messages report provided in the Salesforce Communities Management package. This report lets you track trends and stay on top of message spamming attacks in your community. You can view who sent the message, the contents of the message, when it was sent, and who flagged the message. You can use this report to unflag messages and delete messages.

To get this report, install the Salesforce Communities Management package from the AppExchange. For more information, see [Report on Communities with the Dashboards and Insights Package](#).

- Create your own report.

First, create a custom report type using `Networks` as the primary object and `Network Audits` as the secondary object. Then create a report using your new custom report type and add a field filter for `Audited Object Type` set to equal `Chatter Message`. Use the API to delete flagged messages.

- Directly query the flagged messages from the API and then delete them.

 **Tip:** If you want to receive an email each time a message in your community is flagged, select the **Flags an item as inappropriate** option on the Email Settings page. To receive emails, you must have the “Moderate Communities Chatter Messages” and “Moderate Communities Feeds” permissions. To set your email preferences, go to your profile page within a community, click the drop-down button () in the upper-right corner and select **My Settings**, then click **Email Settings**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To moderate messages in Community Management:

- “Moderate Communities Chatter Messages”

AND

“Manage Communities”
OR “Create and Set Up Communities”

AND

Is a member of the community whose Community Management page they’re trying to access.

To view the contents of a flagged message in reports:

- “Moderate Communities Chatter Messages”

To remove flags or delete messages in the SOAP API:

- “Modify All Data”

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your community.

-  **Tip:** Did you know you can do this in the UI? Most communities don't need custom moderation triggers. You can create moderation rules and criteria directly in Community Management. For more information, see [Community Moderation Rules](#).

Using triggers to automatically flag items allows you to moderate your community behind the scenes. These flags are **only** visible to moderators. You can view flags in Community Management, query for them in the API, or use custom report types to create reports on flagged items, people whose items are flagged most, and more.

Consider the following when creating triggers:

- Create Apex after insert triggers on either FeedItem, FeedComment, ChatterMessage, or ContentDocument.
- Define criteria that when met creates a NetworkModeration (flag) record, with the FeedComment, FeedItem, ChatterMessage, or ContentDocument as the parent.

-  **Example:** This trigger automatically flags posts in your community that contain *BadWord*.

```
trigger autoflagBadWord on FeedItem (after insert) {
    for (FeedItem rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope))
            continue;

        if (rec.body.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new NetworkModeration(entityId=rec.id,
visibility='ModeratorsOnly');
            insert (nm);
        }
    }
}
```

A similar trigger on comments would look like this.

```
trigger autoflagBadWord on FeedComment (after insert) {
    for (FeedComment rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope))
            continue;

        if (rec.commentBody.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new NetworkModeration(entityId=rec.id,
visibility='ModeratorsOnly');
            insert (nm);
        }
    }
}
```

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To create triggers:

- "Modify All Data"

Organize Self-Service Communities with Topics

Topics are a fantastic way to organize content in any community. Community members can add topics to posts and discussions, and structure content organically. When you set up a self-service community with the Napili template, you can use the Community Management page to quickly guide members to key navigational and featured topics.

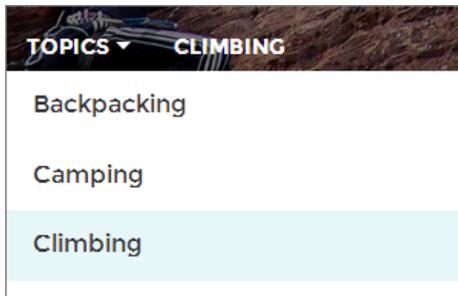
On the Community Management page, you choose navigational topics and subtopics to provide a consistent map of your community, and featured topics to highlight current, popular conversations. In the community itself, member-created topics let users organize information for each other, creating a personalized experience that boosts community engagement.

In a self-service community, the Napili template specifies the layout and design of navigational, featured, and member-created topics. Below are visual examples of each type in an active community.

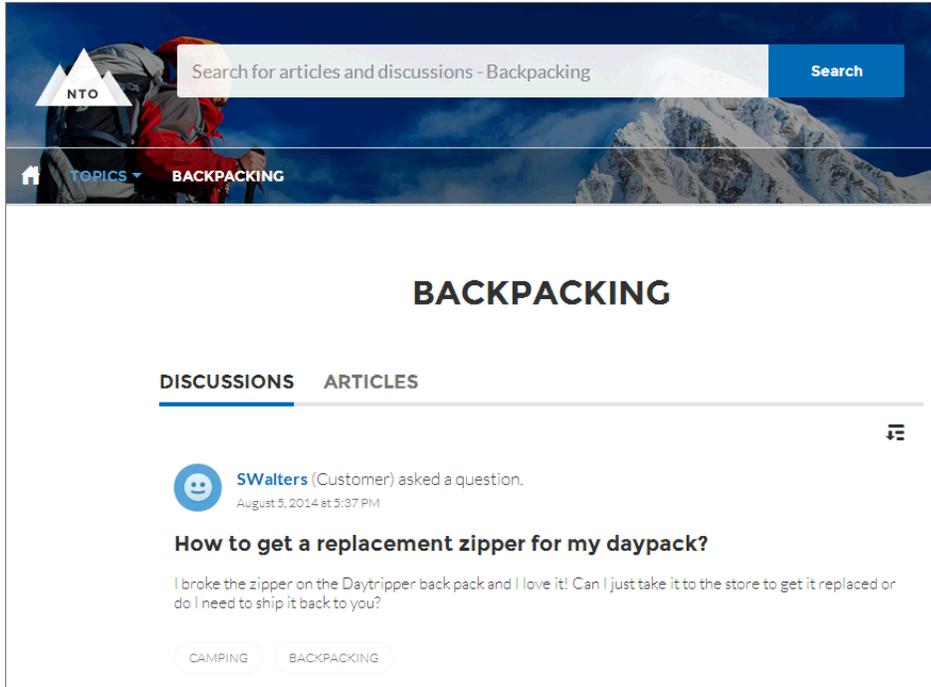
 **Tip:** To add navigational and featured topics to other types of communities, Apex developers can use the [ConnectApi.ManagedTopics class](#) in a Visualforce page.

Navigational topics

On every page of a self-service community, navigational topics are available from the Topics menu at upper left. Community members can also see all the community's navigational topics and subtopics in one place in the topic catalog.

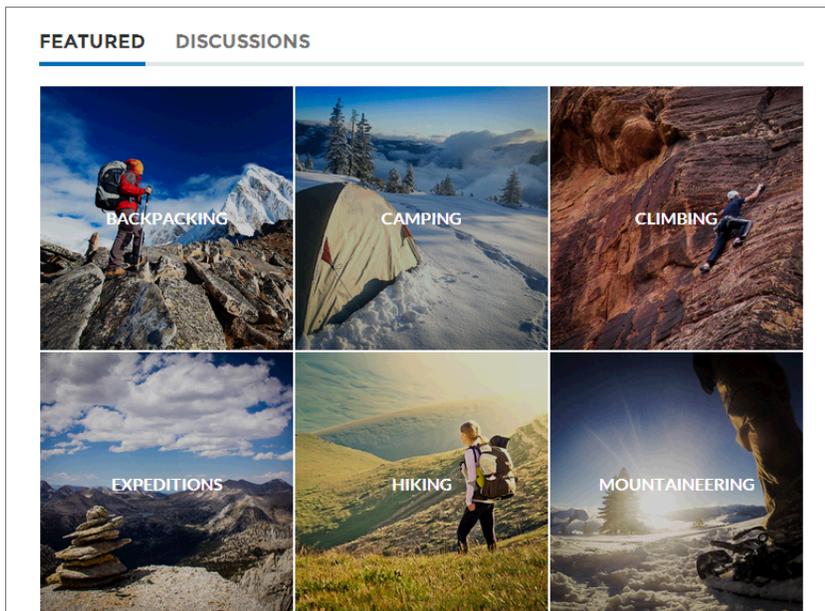


When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



Featured topics

Featured topics are accessible from the body of your community home page. Thumbnail images you select for featured topics uniquely identify them. (These unique thumbnails appear only on the home page; at the top of all featured topic pages, the default banner image specified in Community Builder appears.)



Member-created topics

When posting questions, community members create topics by using hashtags in body text, or typing in the topic suggestions box below. (In Setup, the “Assign Topics” and “Create Topics” permissions must be enabled for community users.)

The screenshot shows a post creation form. At the top, it says "Post To Backpacking" with a dropdown arrow and a close button (X). Below that is the question "What's the best backpack for a solo expedition?". The main text area contains the question: "I'm doing a solo hike of the Pacific Crest Trail next July. Any recommended packs for a #PCT trek like this?". Below the text is a prompt: "Topics help get your questions seen by the right people". Underneath is a text input field containing "Camping, Expeditions" and a blue "ASK" button.

If any suggested topics are poor matches for the post, members can simply click to delete them.



Tip: Member-created topics can be accessed via search, or highlighted as featured topics on the Community Management page.

[Manage Topics in Communities](#)

As the number of topics in a community grows, curate them to improve usability. In Community Management, you can create, merge, rename, and delete topics in one convenient location.

[Set Up Featured Topics](#)

Featured topics highlight current, popular community conversations. Change them regularly to keep community members up-to-date and engaged.

[Set Up Navigational Topics](#)

Structure your community's content and help your users find what they need with navigational topics. If your organization uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. (If data categories aren't enabled, administrators can add articles to each topic using the Chatter REST API.)

[See Your Community's Topics and Subtopics in One Place](#)

You've gone through the exhaustive task of adding topics and various levels of subtopics to your community's content. Now you want your community members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your community's topic catalog.

[Add Topics to Articles or Remove Them](#)

Easily add multiple topics of any type to specific articles, or quickly remove them as community needs change.

[Translate Topics Names and Descriptions for International Communities](#)

Use the Translation Workbench to translate navigational and featured topics, and topic descriptions, in international communities.

Manage Topics in Communities

USER PERMISSIONS

To access the Community Management page:	“Manage Communities” OR “Create and Set Up Communities”
To create topics:	“Create Topics”
To merge topics:	“Merge Topics”
To delete topics:	“Delete Topics”
To rename topics:	“Edit Topics”

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

As the number of topics in a community grows, curate them to improve usability. In Community Management, you can create, merge, rename, and delete topics in one convenient location.

1. [Open Community Management](#).

2. Click **Topics > Topic Management**.

3. Do any of the following:

- To create a topic (often with a plan to merge existing ones into it), click **New**. Add a name and a topic description, which will boost SEO.
- To combine existing topics, click **Merge**.

Merging a topic automatically redirects existing hashtags in posts. If you merge a navigational or featured topic, the topic type, image, and any subtopic relationships are discarded.

- To rename or delete an existing topic, or add a description to it, click .

If you don't see a topic you want to rename or delete, either search for it or click **Show More** below the topic list.



Tip: For communities with a global audience, you can [translate names and descriptions](#) of navigational and featured topics. From Setup, search for and select *Translate*. Then select the *Managed Topic* setup component, and expand a community to see its master topic names.

Set Up Featured Topics

Featured topics highlight current, popular community conversations. Change them regularly to keep community members up-to-date and engaged.

1. [Open Community Management](#).
2. Click **Topics > Featured Topics**.
3. Select a navigational or member-created topic you want to feature from the dropdown menu. Up to 1000 topics load in the drop down menu when you are choosing a topic. Then click **Add**.

 **Tip:** Using the Chatter REST API, you can create unique featured topics, separate from navigational, or member-created ones.

4. Hover over a topic name, and click . Then click **Upload thumbnail image**, and select an image that represents the featured topic on the community home page.
(Thumbnail images are scaled to 250 x 250 pixels. To prevent distortion, create image files with those dimensions.)
5. Repeat steps 3 and 4 to create several featured topics for your community, up to a maximum of 25. Then click **Save**.

To quickly edit existing featured topics, simply hover over a topic name, and do any of following:

- To move topics up or down, click the arrows at left.
- To rename or delete topics, or change their thumbnail images, click .

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To access the Community Management page:

- "Manage Communities"

OR

"Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

To set up featured topics:

- "Edit Topics"

Set Up Navigational Topics

Structure your community's content and help your users find what they need with navigational topics. If your organization uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. (If data categories aren't enabled, administrators can add articles to each topic using the Chatter REST API.)

1. From Setup, enter *Topics for Objects* in the Quick Find box, then select **Topics for Objects**, and enable topics for all the article types you want to include.

 **Note:** Enabling topics disables public tags on articles. Personal tags aren't affected.

2. [Open Community Management](#).
3. Click **Topics > Navigational Topics**.
4. In the text box at right, enter a topic name, and click **Add**. Want to add subtopics? After you add a topic, choose your topic from the drop down menu (under Show the subtopics of). To add a subtopic, add another topic and click **Add**. You can add up to two levels of subtopics for each parent topic.
5. If your organization uses data categories, hover over the navigational topic name, and click . Select a Data Category Group, then select the categories you want to add to the topic, and click **Add Articles & Close Window**.

 **Important:** This process adds only current articles to a topic. To add new articles, return to Community Management and repeat the step above.

6. Hover over a topic name, and click . Then click **Upload banner image**, and select an image that appears across the top of the topic page.

(Banner images are scaled to 1400 x 180 pixels. To prevent distortion, create image files with those dimensions.)

7. Repeat steps 4-6 to create several navigational topics for your community. Then click **Save**.
8. Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization. The following is the maximum number of navigational topics and subtopics you can have in a Napili community template.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

 **Tip:** To quickly edit existing navigational topics, simply hover over a topic name, and do any of following:

- To move a topic up or down, click the arrows at left.
- To rename or remove a topic, change its banner image, or remove assigned articles, click .

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To access the Community Management page:

- "Manage Communities"

OR

"Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

To set up navigational topics:

- "Create Topics"

AND

"Edit Topics"

To add articles to topics:

- "View Data Categories"

AND

"Read" on related article types

See Your Community's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your community's content. Now you want your community members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your community's topic catalog.

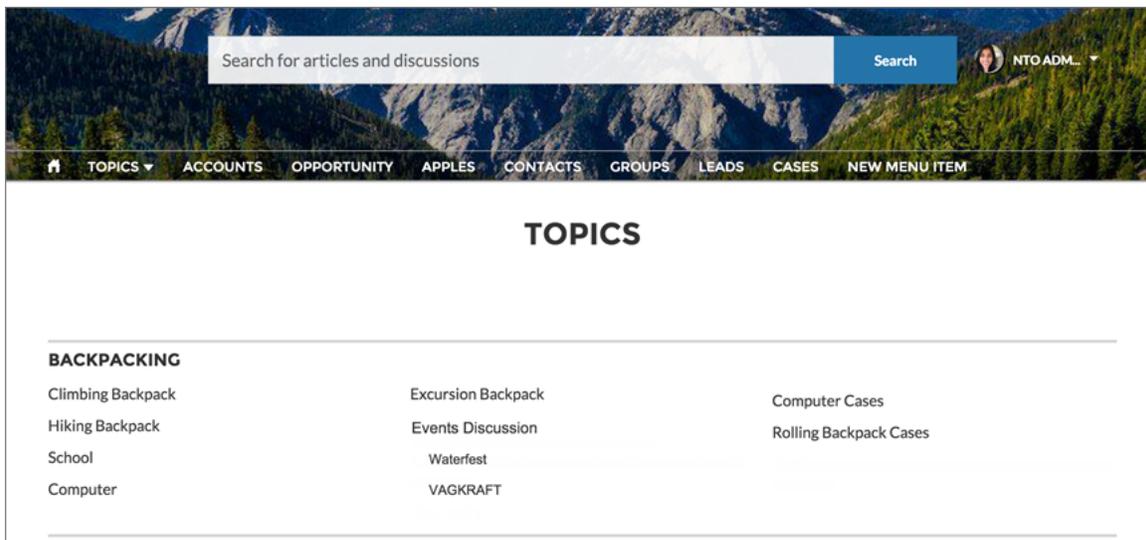
The topic catalog shows the community's hierarchy of navigational topics you have created. It is only visible once you have set up navigational topics, and it is accessed from the navigation menu.

How can the topic catalog be useful to your community members?

- New and returning users look at all the organized topics in one place, getting a lay of the land before diving deeper into a specific topic.
- Any community user can use the topic catalog as a jumping point to go from topic to topic.

To set up the topic catalog, select the **Add the "More Topics..." link** when editing the navigation menu on the home page.

 **Example:**



Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as community needs change.

1. [Open Community Management](#).
2. Click **Topics > Article Management**.
3. Use the search bar to look for articles. Filter your search by selecting a data category group, followed by a specific category.
4. Click an article, and then type to assign topics, or click existing ones to remove them.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To access the Community Management page:

- “Manage Communities”

OR

“Create and Set Up Communities”

To add or remove topics:

- “Create Topics”

Translate Topics Names and Descriptions for International Communities

Use the Translation Workbench to translate navigational and featured topics, and topic descriptions, in international communities.

1. From Setup, enter *Translate* in the **Quick Find** box, then select **Translate**.
2. Select the *Language* you’re translating into.
3. For *Setup Component*, select **Managed Topic**.
4. For *Aspect*, select **Field Label** to change the topic name, and **Description** to change the topic description.
5. In the *Community Name* column, expand a community to see its master topic names.
6. To enter language-specific names for navigational and featured topics, double-click in the *Topic Name Translation* column.

Consider the following when you’re using the Translation Workbench:

- There is no Metadata API support for translated topic names or descriptions.
- While topic name uniqueness is guaranteed in English, the translator must ensure the uniqueness of topic names in the translated language.
- Modifying topic names from Community Management only changes the English community. All translated topic name and description changes must be made using the Translation Workbench.
- If a translated topic name is entered when the community is in English mode, the translated name can appear twice in the translated community.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To translate topics:

- “View Setup and Configuration”

AND

Be designated as a translator

- When topics names are translated with the Translation Workbench, hashtags in the translated communities also change. For example, #help shows as #aiuto in Italian. If the community member then reverts to English from Italian, clicking the #aiuto hashtag gives an error message rather than showing the topic detail page of #help.

Customize Recommendations in Communities

Create recommendations to drive engagement for your community, encouraging users to watch videos, take trainings, and more. Edit these recommendations in Community Management, where you can target specific audiences and use channels to specify locations for the recommendations.

1. [Open Community Management](#).
2. Select **Recommendations** > **Recommendations**.
3. Select Default Channel or one of the custom channels.

A channel is a way to group recommendations together so you can determine where they show up in the community.

Default Channel

Recommendations in the default channel appear in predefined locations, such as directly in the feed in the Salesforce1 mobile browser app and on the Home and Question Detail pages in communities using the Summer '15 or later version of the Napili template.

Custom Channel

You choose the pages where you want these recommendations to appear. In Community Builder, add the Recommendations component to the page where you want the recommendation to appear. Use the Property Editor to specify the custom channel with the recommendation.

Using a custom channel, you could surface a recommendation to review specific knowledge articles on a product description page to guide customers to more information.

If you want to change the channel of a recommendation, delete the recommendation and recreate it in a different channel.

4. Click **New**.
5. Complete the following fields:
 - **Name**—Enter a name for the recommendation in Community Management. This name doesn't appear in the community.
 - **Image**—Click **Upload Image** to include an image with your recommendation.
 - **Title**—Optionally, enter header text that appears above the image.
 - **Description**—Enter detailed text that suggests what users can do.
 - **Button text**—Enter a label for the button in the recommendation.
 - **https://**—Enter the URL that the button opens.
 - **Audience**—Select an audience for the recommendation. If you don't select an audience, all members of the community see the recommendation.

 **Tip:** To create an audience that appears in this drop-down list, in Community Management select **Recommendations** > **Audiences** and click **New**.

 - **Enabled**—If checked, this recommendation is active and appears in communities.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To access the Community Management page:

- "Manage Communities"
- OR
- "Create and Set Up Communities"

When disabled, recommendations that exist in feeds in the Salesforce1 mobile browser app are not removed, but no new recommendations appear. In communities using the Summer '15 or later version of the Napili template, disabled recommendations no longer appear.

6. Click **Save**.

 **Tip:** To remove a recommendation, in Community Management, select **Recommendations > Recommendations**, and click the recommendation name. At the bottom of the recommendation details, click **Delete**.

Target Community Member Audiences for Your Recommendations

Create audiences of new community members, or use the API to manage customized lists of audience members.

1. [Open Community Management](#).

2. Select **Recommendations > Audiences**.

3. Click **New**.

4. Complete the following fields.

- **Name**—Enter a name for the audience in Community Management.
- **Audience Type**
 - Select **New Members** to create an audience based on how long users have been community members.

Enter the number of days since registration for audience members.

- Select **Custom List** to create an audience based on any criteria you want.

 **Note:** You can't manage audience membership for custom lists through the UI. Add and remove members through the API.

5. Click **Save**.

Audiences you create appear in the Audience drop-down list when you create a recommendation.

 **Tip:** To remove an audience, in Community Management, select **Recommendations > Audiences**, and click the audience name. At the bottom of the audience details, click **Delete**. If you remove an audience that is associated with a recommendation, the recommendation is disabled and the audience is set to the default (All community members).

Reputation Overview

Your reputation in the community directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

Your reputation level appears on your profile page and when any user hovers over your name. It's visible to other community members so that they know how influential you are. When you start out in the community, you are at the lowest level. As you become more active in the community, you gain points and your reputation level increases. Increases in reputation levels are posted to your feed. In other words, as people see you participating and sharing your knowledge, your credibility and influence grows.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To access the Community Management page:

- "Manage Communities"
- OR
- "Create and Set Up Communities"

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

These are the default actions that increase your reputation level:

You increase your reputation by:

- Posting
- Commenting
- Liking a post or comment
- Sharing a post
- People sharing your posts
- People commenting on your posts
- People liking your posts or comments
- Mentioning someone
- Being mentioned
- Asking a question
- Answering a question
- Receiving an answer
- Marking an answer as best
- People marking your answer as best
- Endorsing someone for knowledge on a topic
- Being endorsed for knowledge on a topic

[Enable Reputation in Your Community](#)

Enable reputation in your community so that members are recognized and rewarded for participating.

[Set Up Reputation Levels](#)

Update the default reputation levels to meet your community's needs and help motivate your members.

[Set Up Reputation Points](#)

Set up a point system to reward users for participating in the community.

[How is my community reputation calculated?](#)

The reputation level on your profile is calculated based on your total points.

Enable Reputation in Your Community

Enable reputation in your community so that members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation, because community managers know that recognition and a little friendly competition usually lead to more active members. Enabling reputation turns on a default point system and set of reputation levels in the community. A community manager can personalize labels and point values from the Community Management page.

Members start to accrue points by performing the actions that have assigned point values. Once the member exceeds the top of the level's point threshold, they move up a level. They, and other members of the community, see their reputation level on their profile and when hovering over their name. Total points also show on member's profiles.

 **Note:** When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

1. [Open Community Management](#).
2. Click **Administration > Preferences**.
3. Select **Enable setup and display of reputation levels**, then click **Save**.

After you enabled reputation, a default point system and set of reputation levels is available on the Community Management page. The default reputation points are as follows:

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1
	If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5

EDITIONS

Available in: **Salesforce Classic**

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To edit Communities settings:

- "Create and Set Up Communities "

AND

Is a member of the community whose Community Management page they're trying to access.

Action	Points
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

If your selected community template doesn't have Chatter enabled, the Reputation node won't appear in Community Management. To show the Reputation node, go to **Administration > Preferences** and select **Show all settings in Community Management**.

Set Up Reputation Levels

Update the default reputation levels to meet your community's needs and help motivate your members.

When reputation is enabled for a community, 10 default levels are added. You can add or remove levels, give each level a name, and update the point range and image for each level.

 **Note:** A community must have at least three reputation levels and can have up to 50.

1. [Open Community Management](#).
2. Click **Reputation > Reputation Levels**.

From here you can:

- Upload your own image for each reputation level. Click the default image to browse to an image file and upload a new image.

 **Note:** You can't revert to the default reputation level images from the Salesforce user interface. Use the Salesforce Chatter REST API to do this.

- Give each level a name, such as "Beginner," "Intermediate," and "Expert." If you don't assign a name, the default is used. For example, "Level 1," "Level 2," "Level 3."
- Edit the point range for a level.

When you update the higher value of a level's point range, the lower value for the next level is automatically adjusted when you save.

- Add more levels by clicking **Add a level**, located underneath the list of levels.
- Remove a level by clicking  next to the level.

3. Click **Save** to apply your changes.

You can now update the point system for the community. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions by commenting, liking, or sharing their posts. Reputation level increases are posted to member feeds.

You can [translate](#) reputation level names so that international community members can view their reputation levels in the appropriate language. In Translation Workbench, select the `Reputation Level` setup component and then expand the node next to your community.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited,** and **Developer** Editions

USER PERMISSIONS

To update reputation levels:

- "Manage Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

Set Up Reputation Points

Set up a point system to reward users for participating in the community.

When reputation is enabled for a community, there is a default point system set up. When users perform the actions with assigned point values, their total points increase and they start to move towards the next reputation level.

 **Note:** Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

The table shows the default events and points.

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1
	If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Questions and answers in the community feed are not to be confused with the Chatter Answers functionality.

EDITIONS

Available in: **Salesforce Classic**

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To update reputation points:

- "Manage Communities"
- AND
- Is a member of the community whose Community Management page they're trying to access.

 **Note:** In organizations with reputation enabled prior to the Winter '15 release, actions associated with questions and answers will be available at the time of the release and their default point values will be set to 0. Existing user reputation points will not be affected by the release, and users won't accrue points from these actions until you configure point values for them.

1. [Open Community Management](#).
2. Click **Reputation > Reputation Points**.
3. Update the points for each action. If you don't want users to accrue points for a certain action, set the Points to 0.
4. Click **Save**.

Point totals show up on profile pages beneath the photo. Point totals are visible to anyone in the community.

 **Tip:** You can directly update reputation points for a community member via the Salesforce API. You can also use Apex triggers to send custom notifications based on changes to reputation points.

How is my community reputation calculated?

The reputation level on your profile is calculated based on your total points.

Points are accrued when you perform activities that your community manager has assigned point values. You could also potentially gain points if your posts or comments draw reaction from other community members. For example, your community manager may have decided that writing a post earns you 5 points. If someone else shares your post, your community manager may decide that you should earn 10 points because your post is influencing others to contribute.

 **Note:** Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user does not get points.

Default point values are as follows. Keep in mind that your community manager may have customized these values. For more information, contact your community manager.

EDITIONS

Available in: **Salesforce Classic**

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

Action	Points
Community Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1
	If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	

Action	Points
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Community Administration

Customize your community's properties, such as name, description, URL, status, and template, in the Administration section of Community Management. You can also update your community settings, such as members, tabs, branding, login and registration, and emails.

For detailed information about working with the Administration section, see [Getting Started with Communities](#).

Limit Files in Your Community

Restrict the size and types of files that your community members can upload. This whitelist of file types lets you control what your community members upload and also prevents spammers from polluting your community with inappropriate files.

Community file moderation must be enabled for your org before you can limit files in your community. If you don't see the option to limit files in Community Management, contact Salesforce.

Your community file limits apply to files uploaded by community members anywhere in the community—in posts and comments, directly in the Files tab, and also from Salesforce1. You can also set community file limits using the SOAP API or Metadata API.

Files uploaded before setting your file limits are unaffected. However, newer versions of those files must meet the limits you specify.

Keep the following things in mind:

- A file must meet the file limits set in the community in which it's uploaded. For example, if a customer uploads a file on a case and then an agent uploads a newer version in your Salesforce internal org, the limits from the customer community still apply.
 - Files uploaded in your internal Salesforce org that are shared in a community aren't subject to community file limits.
1. Access Community Management in one of the following ways.
 - From the community:
 - In Salesforce Tabs + Visualforce communities, click  in the global header.
 - In Community Builder-based communities, use the drop-down menu next to your name and click **Community Management**.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** Editions

USER PERMISSIONS

To limit the files in your community:

- "Manage Communities" OR "Create and Set Up Communities"

AND

Is a member of the community whose Community Management page they're trying to access.

- From Setup, enter *All Communities* in the Quick Find box, then select **All Communities** and click the **Manage** link next to a community. To access this page, you need the "Create and Set Up Communities" permission.
 - From Community Builder, in the header, use the drop-down menu next to the name of your template and click **Community Management**.
2. Select **Administration > Preferences**, then enter your limits in the Files section on the page.
 - **Maximum file size in MB**—Enter a number between 3 MB and your org's maximum file size. To use the default limit of 2 GB, leave this field empty or enter *0*.
 - **Allow only these file types**—Enter file extensions separated with a comma (for example: *jpg, docx, txt*). You can enter lowercase and uppercase letters. You can enter up to 1,000 characters. To allow all file types, leave this field empty.
 3. Click **Save**.

After you set your community's file limits, members receive an error message if their file is larger than the size you set or if their file extension isn't allowed.

When a member tries to upload multiple files at once and a file is found that doesn't meet your limits, none of the files are uploaded.

RESOURCES FOR COMMUNITY MANAGERS

When you're managing a community, every extra bit of information helps. Use these resources to assist you with your daily community management duties.

success.salesforce.com

Have a question about Communities? Have a great idea about community management that Salesforce should implement? Know a lot about communities and want to help others? Visit the Salesforce Success Community and start collaborating with other Salesforce Communities users just like you! From the Salesforce Success Community you can ask questions and get answers, post ideas, view help and training offerings, collaborate with other Salesforce users and more.

Playbook: Engaging Your Customer or Partner Community

A playbook that contains strategies and tips on how to grow engagement in your community.

Playbook: Build a Thriving Community

A playbook that contains details about how to create a successful community, including the story of how the Success Community was built.

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