Answers Implementation Guide

Salesforce, Spring '16

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INTRODUCTION TO ANSWERS

> **Note:** Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

Answers is a feature of the Community application that enables users to ask questions and have community members post replies. Community members can then vote on the helpfulness of each reply, and the person who asked the question can mark one reply as the best answer.

This guide outlines the necessary steps to set up answers:

1. Plan your answers implementation.
2. Enable answers.
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PLANNING YOUR IMPLEMENTATION

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Before you set up answers, you may need to identify an executive sponsor to champion the answers project within your organization and obtain the support of other departments. An executive sponsor can help make key decisions about the community that best fits your organization. The following sections discuss some of the key decisions that need to be made.

Who Needs Access to Your Answers Community?

You can display an answers community to the following types of users:

- Internal Salesforce users
- Customer Portal users
- Partner portal users
- Public users (requires setting up a Force.com Site)

What Categories Do You Want Assigned to Questions?

A community member can assign a data category to a question to make the question easier for other community members to find. Before you enable answers, think about the data categories you want to make available. For example, if you sell computers, you might have a Products community with the following data categories: Performance Laptops, Portable Laptops, Gaming Desktops, and Enterprise Desktops. To implement data categories, you'll create a category group, add categories to the group, then assign the group to your community.

Do You Want to Restrict Certain Users From Seeing Specific Categories?

If you want to restrict which categories (and all associated questions) certain users can access, you need to assign roles to the users in your answers community. Some questions you need to answer include:

- How many different roles need to be created?
- What is an appropriate name for each role?
- What categories should each role have access to?

If your organization uses roles but does not assign one to every user, users without roles can only see categories and categorized questions if you make the category group visible by default to all users. Users with a role can view all categories and categorized questions permitted by their role.

Do You Want to Create Workflow Rules for Questions?

After answers is enabled, you can create workflow rules for questions. For example, you may want to create a workflow rule that sends the community administrator an email whenever a question has ten or more replies but no best answer. Questions do not support approval processes or workflow tasks. For more information, see "Set the Criteria for Your Workflow Rule." in the Salesforce Help

Do You Want Knowledge Base Users to Create Articles from Helpful Replies?

If your organization uses Salesforce Knowledge, you can enable a **Promote to Article** button on replies that is visible to community members who have permission to create articles. After a reply is promoted to the knowledge base, members browsing or searching the answers community can click a link on the reply to read the published article. If the article is not yet published, the reply provides the name of the draft article, the author who promoted the reply, and the date and time the article was created. For more information, see "Enable Salesforce Knowledge" in the Salesforce Help.

ENABLING ANSWERS

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When you enable answers, you need to assign a default community that displays in the Answers tab. A community named Internal Community is automatically created when you enable answers and you can use this as your default community. Once you enable answers, you can rename Internal Community to a more descriptive name.

To enable answers:

1. From Setup, enter `Answers Settings` in the `Quick Find` box, then select **Answers Settings**.

2. Click **Edit**.

3. Select the `Enable Answers` checkbox to enable answers.

4. For `Answers Community`, select Internal Community or any existing community you want to assign to answers.

5. Click **Save**.

6. To rename Internal Community or make your community available to your customers or partners:

    a. From Setup, enter `Communities` in the `Quick Find` box, then select **All Communities**.

    b. Click **Edit** next to Internal Community or the community you assigned to answers.

    c. Enter a descriptive name. If you change the name of the community assigned to answers, that community is still associated with answers and the new name appears to community members on the Answers tab.

    d. Make sure `Active` is selected.

       Answers doesn't support the Experts Group feature so you can ignore this field.

    e. If you want your customers or partners to be able to access your answers community, select the appropriate Customer Portal or partner portal from the `Portal` drop-down list. Alternatively, select Show in All Portals to display the community in all your customer and partner portals.

    f. Click **Save**.

CREATING CATEGORIES FOR YOUR ANSWERS COMMUNITY

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In an answers zone, a *category group* provides one or more categories that help organize questions for easy browsing. If the category group contains a hierarchy, only the first-level categories display on the Answers tab. For example, if you're a computer manufacturer you might create a Products category group for your Products zone that has four categories: Performance Laptops, Portable Laptops, Gaming Desktops, and Enterprise Desktops. Zone members can choose one of the categories to assign to a question.

The following example shows how the categories within a category group appear on the Answers tab.

Answers tab displaying categories

1. The zone assigned to answers.

2. When you assign a category group to answers, the data categories within the group appear beneath the zone name on the Answers tab. Zone members can assign these categories to their questions and browse within categories to see related questions. The name of the category group isn't displayed within the answers community.

To create a category group and add categories to that group:

1. From Setup, enter `Data Category` in the `Quick Find` box, then select **Data Category Setup**.

2. Click **Create New** in the Category Groups section.

3. Specify the `Group Name` and `Group Unique Name`. The group name doesn't appear on the Answers tab.

   We recommend naming the category group the same as the answers community so other administrators understand where the category group is being used.

4. Optionally, enter a description of the category group.

5. Click **Save**.

 Salesforce automatically creates a top-level category in the group named `All`.

6. Add child categories to your category group:

 a. In the field provided under the `All` category, enter the name of your first category and click **Add**. Repeat until you have created all the categories for your answers community.

 Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions.

 b. Click **Save**.

7. Activate the category group by moving the mouse pointer over the name of the category group and clicking the `Activate Category Group` icon ( ).

ASSIGNING DATA CATEGORIES TO ANSWERS

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After you create a category group and add data categories for your answers community, you need to assign the categories to answers:

1. From Setup, enter `Data Category Assignments` in the `Quick Find` box, then select **Data Category Assignments** under Answers. The category group assignments page only displays after you enable answers.

2. Click **Edit**.

3. Select the category group you want to assign to your answers community. You can only assign one category group to answers.

4. Click **Save**. The categories in the category group are now available in your answers community.

Note: If you change the category group for answers later, all the existing categories associated with your questions are removed. The questions in your answers community become uncategorized until community members assign the new categories to them.

RESTRICTING ACCESS TO CATEGORIES

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Community members can assign data categories to questions for easy browsing and classification.

📝 **Note:** There are two conditions that bypass data category group visibility. Users with "View All Data" or "View All" object permissions on Questions records can view records in all categories.

Default data category visibility settings allow you to provide category visibility to users without assigned visibility.

Modifying Category Group Visibility Settings

Set up your role-based visibility settings and, if needed, the default visibility settings. If you make categories visible by default, remember that all community members without roles have access to those categories. See Data Category Visibility in the Salesforce online help.

CREATING VALIDATION RULES TO PREVENT OFFENSIVE LANGUAGE

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If you want to prevent offensive language from being posted to your answers community, create validation rules for questions and replies.

To create a validation rule for questions, from the object management settings for questions, go to Validation Rules, then click **New**. Refer to the following table for details, replacing "darn" and "dang" in the formula with the words you want to block.

Field	Value
Description:	Prevents users from entering offensive language in the `Title` and `Description` fields when asking a question.
Formula:	`OR(CONTAINS(Title, 'darn'), CONTAINS(Body, 'darn'))`
Error Message:	Question title or description contains offensive language.

To create a validation rule for replies, from the object management settings for replies, go to Validation Rules, and click **New**. Refer to the following table for details, replacing "darn" and "dang" in the formula with the words you want to block.

Field	Value
Description:	Prevents users from entering offensive language when replying to a question.
Formula:	`OR(CONTAINS(Body, 'darn'), CONTAINS(Body, 'dang'))`
Error Message:	Reply contains offensive language.

ENABLING ESCALATE-TO-CASE ON QUESTIONS

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If a question remains unresolved or its reply isn't satisfactory, administrators and trusted community members can escalate the question to a case. After a case is created, the question detail page provides a link to the case for the life of the question. This link also shows the status of the case.

Note: Closing the case does not mark the question as resolved, and resolving the question does not close the case. The case and the question must be updated separately.

To add the **Escalate to Case** button to questions:

1. Find the object management settings for cases. From Setup, enter `Cases` in the `Quick Find` box.

2. Go to Page Layouts.

3. Edit each case page layout to include the `Question` field.

4. From the object management settings for cases, go to Fields.

5. Click the `Question` field and then **Set Field-Level Security**. Make sure the field is visible for profiles that will escalate questions to cases. (The profiles must also grant permission to create cases.)

When a community member clicks **Escalate to Case**, the question title becomes the case `Subject`. The community member is returned to the question detail page after saving the case, and the case is available for the `Case Owner` to begin resolving.

ENABLING ANSWERS IN YOUR CUSTOMER PORTAL

Note: Starting with Summer '13, Answers isn't available for new organizations. Now you can use Chatter Answers, a self-service and support community where users can post questions and receive answers and comments from other users or your support agents. Chatter Answers brings together Case, Questions and Answers, and Salesforce Knowledge articles in a unified experience. Existing organizations will continue to have access to Answers if it was enabled prior to the Summer '13 release.

If you do not want to restrict your answers community to just your internal Salesforce users, you can set up a Customer Portal and display the community to your customers. Setting up a Customer Portal is also required if you want to display an answers community publicly using Force.com Sites.

To give your customers access to your answers community:

1. Set up a Customer Portal if you don't already have one. For more information, see "Setting Up Your Customer Portal" in the Salesforce online help.

   If you customize the portal fonts and colors, note that answers only supports the following changes:

   - All tab styles
   - The following page styles:
     - Page Background
     - Text
     - Link
     - Link Hover

2. Make sure your answers community is set up to display in your Customer Portal:

   a. From Setup, enter `Communities` in the `Quick Find` box, then select **All Communities**.

   b. Edit your answers community.

   c. Verify that either your Customer Portal or the Show in All Portals option is selected in the `Portal` drop-down list.

3. Add the Answers tab to the Customer Portal:

   a. From Setup, enter `Customer Portal Settings` in the `Quick Find` box, then select **Customer Portal Settings**.

   b. Select the Customer Portal where you want to customize tabs.

   c. Click **Customize Portal Tabs**.

   d. Move **Answers** from the Available Tabs box to the Selected Tabs box. To change the order of the tabs, select a tab title in the Selected Tabs box, and click the **Up** or **Down** arrow.

   e. Click **Save**.

4. Create Customer Portal users:

   a. On the contact detail page, click **Manage External User** and then choose **Enable Customer User**.

   b. Enter the required information, making sure to select the correct Customer Portal profile from the **Profile** drop-down menu.

   c. Click **Save**.

5. If you want your Customer Portal users to have different category group visibility settings than the account owner, change the visibility settings for the Customer Portal user.

See Restricting Access to Categories on page 8.

By default, Customer Portal users inherit their category access from the account owner. For example, if the account owner has a role of CEO and the CEO role has full access to all the data categories in the category group assigned to answers, then Customer Portal users can also access all categories in the answers community. In some cases, you may want to limit which categories a Customer Portal user can access.

6. If your organization has the Ideas and Answers Portal license, hide the Reports tab in the Customer Portal. Otherwise, your Customer Portal users receive an Insufficient Privileges message when they click the Reports tab. For information on hiding tabs, see "Customizing Your Customer Portal Tabs" in the Salesforce Help.

ENABLING ANSWERS IN YOUR PARTNER PORTAL

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You can use the partner portal to give your partners access to an answers community.

To enable answers in your partner portal:

1. Set up a partner portal if you don't already have one. For more information, see "Setting Up Your Partner Portal" in the Salesforce online help.

   If you customize the portal fonts and colors, note that answers only supports the following changes:

   - All tab styles
   - The following page styles:
     - Page Background
     - Text
     - Link
     - Link Hover

2. Make sure your answers community is set up to display in your partner portal:

   a. From Setup, enter `Communities` in the `Quick Find` box, then select **All Communities**.

   b. Edit your answers community.

   c. Verify that either your partner portal or the Show in All Portals option is selected in the `Portal` drop-down list.

3. Add the Answers tab to the partner portal:

   a. From Setup, enter `Partners` in the `Quick Find` box, then select **Settings**.

   b. Select the partner portal whose tabs you want to customize.

   c. Click **Customize Portal Tabs**.

   d. Move **Answers** from the Available Tabs box to the Selected Tabs box. To change the order of the tabs, select a tab title in the Selected Tabs box, and click the **Up** or **Down** arrow.

   e. Click **Save**.

4. Create partner portal users:

   a. On the account detail page associated with the contact you want to add as a partner portal user, click **Manage External Account** and then choose **Enable as Partner**.

      Confirm you want to enable this account as a partner account.

   b. On the contact detail page associated with the new partner account, click **Manage External User** and then choose **Enable Partner User**.

   c. Enter the required information, making sure to select the correct partner portal profile from the **Profile** drop-down menu.

      d. Click **Save**.

5. If you want your partner portal users to have different category group visibility settings than the account owner, change the visibility settings for the partner portal user.

Refer to Restricting Access to Categories on page 8.

By default, partner portal users inherit which categories they can access from the account owner. For example, if the account owner has a role of CEO and the CEO role has full access to all the data categories in the category group assigned to answers, then partner portal users can also access all categories in the answers community. In some cases, you may want to limit which categories a partner portal user can access.

6. If your organization has the Ideas and Answers Portal license, hide the Reports tab in the partner portal. Otherwise, your partner portal users receive an Insufficient Privileges message when they click the Reports tab.

ENABLING ANSWERS IN YOUR FORCE.COM SITE

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Force.com Sites enables you to create public websites and applications that are directly integrated with your Salesforce organization—without requiring users to log in with a username and password. You can also configure login settings that allow users to log into your portal from your public Force.com site. For example, users browsing through your answers site can register and login directly from that site, and as authenticated users, they can ask questions, post replies, vote on a reply, and participate in the answers community. When users successfully log in, they leave the public site and enter the associated portal seamlessly.

After enabling answers in your Customer Portal, set up your Force.com site. For detailed information about how to customize and manage sites, see the *Force.com Sites Implementation Guide*. The following steps highlight the information pertinent to answers communities:

1. If you're setting up Force.com Sites for the first time, from Setup, enter `Sites` in the `Quick Find` box, then select **Sites** and register and enable your Force.com domain.

2. On the Sites page, click **New** to create a new site for your answers community. Enter the site details as needed while noting the following:

   - You must use AnswersHome as the `Active Site Home Page`.

   - For `Site Template`, you can choose your own custom template, the site template provided, or choose not to use a template. If you use site template provided, be aware that it overrides the styling of your Customer Portal on the pages that reference the site template. If you do not use the site template, then the login, registration, and password reset pages inherit the styling of the Customer Portal.

3. On the site detail page:

   - Click **Edit** on the Site Standard pages related list and move `Answers Pages` from the Available Pages list to the Selected Pages list. Click **Save** to return to the site detail page.

   - If you want to configure login settings, click **Login Settings** and then **Edit**. From the Enable Login For menu, choose the portal associated with your community. Your portal only appears in the menu if you selected `Log in Enabled` when creating the portal. Modify the other settings as needed.

4. To change the default error messages, click **Page Assignment**

5. To modify the permissions of guest users to your site, click **Public Access Settings**.

6. Click **Activate** on the site detail page when you're ready to make your site public.