



Salesforce Ideas Implementation Guide

Salesforce, Spring '17



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IDEAS IMPLEMENTATION

Ideas is a community of users who post, vote for, and comment on ideas. An Ideas community provides an online, transparent way for you to attract, manage, and showcase innovation.

This guide outlines the necessary steps to set up and use Ideas. This guide is divided into the following major sections:

- [Ideas Preparation](#)

Decide who should access Ideas and the type of community you want to create for your users.

- [Ideas Setup](#)

Configure Ideas to meet the needs of your organization.

- [Ideas Administration](#)

Perform a few ongoing administration tasks to keep community members engaged.

IDEAS PREPARATION

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

How Do You Want to Organize Ideas?

An active Ideas community will have many different forums that reflect the different products or ways in which your company interacts with its customers. To further organize your community into smaller groups, you can create zones within a community that reflect special interests, product groupings, or types of customers. Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions.

You can display a zone to the following types of users:

- Salesforce Communities users.
- Public users (requires setting up a Force.com site).
- Internal Salesforce users. Salesforce users can access all zones regardless of whether the community is internal-only or displayed in a portal.
- Customer Portal or partner portal users.
- Salesforce console users.

Professional Edition organizations can have only one internal zone. All other editions can have up to 50 zones shared between Ideas, Answers, and Chatter Answers.

How Do You Want Ideas Categorized?

Categories are administrator-defined values that help organize ideas into logical sub-groups within a zone. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the `Categories` picklist on the Post Ideas page lets users add categories to their ideas.

Think about the categories that you want users to associate with their ideas. For example, if your community members will be posting ideas on how to improve your apparel product line, you may want to create categories for Shirts, Pants, and Shoes.

Do You Want to Display an Idea's Status?

An idea's status helps zone members track the progress of the idea. For example, "Under Review", "Reviewed", "Coming Soon", and "Now Available" are common status values an administrator can define and assign to ideas. An idea's status appears next to the idea's title for all zone members to see.

Do You Want Reward Activity with User Reputations and Levels?

By enabling Reputation in Ideas, and then choosing level names and thresholds, you let users earn points and ratings that reward and encourage frequent, meaningful activity in the community. As community members engage more frequently, they improve the overall quality of ideas, which means that everyone reaps the benefits of a vibrant, creative partnership with your customers.

Do You Want to Have Community Experts?

A community expert is a member of the community who speaks credibly and authoritatively on behalf of your organization. When community experts post comments or ideas, a unique icon (🌟👤) displays next to their name. The Salesforce administrator can designate as many community experts as necessary.

If you want to have experts within your community, create a public group that includes these users. Later in the setup process you will designate this public group as your community experts. For more information, see [Create and Edit Groups](#).

Will You Be Creating Idea Themes?

Idea Themes lets you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company. You'll need to enable Idea Themes, create and publish the idea theme for your community, and then monitor community members as they vote and comment on each other's ideas until they find a winner. For more information, see [Idea Themes](#) on page 14.

IDEAS SETUP OVERVIEW

To set up Ideas, complete the following steps:

1. Set up a Chatter community or a Customer Portal.
2. Customize Ideas settings.
3. Create one or more zones to help organize ideas into logical groups with each zone having its own focus.
4. Define picklist values for the `Categories` and `Status` fields.
5. Create validation rules that prevent offensive language from being used in the zone.
6. Set up Idea reports for your users.
7. If implementing Ideas in a portal, set up a Force.com site to display Ideas publicly.


Setting Up Ideas in a Chatter Community

If you don't want to restrict your Ideas implementation to just your internal Salesforce users, you can set up Salesforce Communities and display Ideas to the public community, allowing them seamless access to your Ideas community. Adding Ideas to Salesforce Communities lets your users reap the benefits of a vibrant, creative partnership between community members.

When you enable Ideas in Salesforce Communities, you give your community members the ability to create ideas and idea themes and have a dialog around them. You can create public communities that let your customers or partners exchange ideas, as well as private internal communities that are specific to your employees.

Once you've implemented Salesforce Communities, set up Ideas as described in the Salesforce Help.

Setting Up a Customer Portal

 **Note:** Starting with Summer '13, the Customer Portal isn't available for new organizations. Existing organizations continue to have access to the Customer Portal, but new Customer Portals can't be created. To display Ideas to your customers, use Salesforce Communities.

If you do not want to restrict your Ideas site to just your internal Salesforce users, you can set up a Customer Portal and display Ideas to your portal users. Setting up a Customer Portal is also required if you want to display Ideas publicly using Force.com sites.

For detailed information about setting up a Customer Portal, see "Setting Up Your Customer Portal" in the Salesforce online help. When setting up the portal, make sure the Ideas tab is displayed. For more information, see "Customizing Your Customer Portal Tabs" in the Salesforce online help.

If you are using Force.com sites to make Ideas publicly available, note the following:

- Setting up a Customer Portal allows sites users to seamlessly log into that portal.
- If you use the site template to modify the look and feel of your Force.com site, be aware that the site template 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.
- Additional information about configuring your Customer Portal and using the site template is provided in the [Sites Implementation Guide](#).

Using Sites to Publicly Display Ideas

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. Using Force.com sites, you can publicly display Ideas and create a community forum for sharing and voting on ideas about your company, services, or products.

Before you set up a Force.com site, make sure a Salesforce Community or Customer Portal already exists that displays the Ideas tab.

For detailed information about setting up a Force.com site, see “Setting Up Force.com Sites” in the Salesforce online help.


Customizing Ideas Settings

To manage organization-wide settings for Ideas:

1. From Setup, enter *Ideas Settings* in the Quick Find box, then select **Ideas Settings**.
2. Click **Edit**.
3. Use the **Enable Ideas** checkbox to enable or disable Ideas for your organization.

Disabling Ideas removes the Ideas tab and users will no longer be able to access active zones, but these zones will reappear on the Ideas tab the next time you enable Ideas.

4. Optionally, select **Enable Text-Formatting, Images and Links** to enable the Ideas HTML editor, which gives users WYSIWYG HTML editing and image referencing capabilities when they post or comment on ideas.

 **Warning:** Once you enable the Ideas HTML editor, you cannot disable it. If you do not see the **Enable Text-Formatting, Images and Links** checkbox, the Ideas HTML editor is enabled for your organization by default.

5. If your organization does not already have the multi-select **Categories** field enabled, click the **Enable** button located below the **Categories** message at the top of the page. This button is not displayed if your organization already has the **Categories** field enabled.

If the **Categories** field is already enabled, the **Enable Categories** checkbox is selected. Once the field is enabled, you cannot disable it.

6. Select **Enable Reputation** to let users earn points and ratings based on their activity in each zone.
7. Select an **Ideas User Profile** type for all user profiles in the zone.

User Profile Type	Description
Chatter profile	The user’s Chatter profile is the default user profile type. If you select this option and a user doesn’t have a Chatter profile, then the Ideas zone profile is used.
Ideas zone profile	The profile that the user sets up for the Ideas zone. This profile type is used for Ideas zones in portals.
Custom profile with a Visualforce page	You can specify a Visualforce page for a custom profile for all Ideas users in the zone. If you select this profile type, you must specify a Visualforce page in Custom Profile Page .

EDITIONS

Available in: Salesforce Classic

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


USER PERMISSIONS

To customize Ideas settings:

- “Customize Application”

- In the `Half-Life (in Days)` field, enter a number of days.

The half-life setting determines how quickly old ideas drop in ranking on the Popular Ideas subtab, to make room for ideas with more recent votes. A shorter half-life moves older ideas down the page faster than a longer half-life.

 **Note:** This field does not appear if Ideas is disabled. To modify the `Half-Life (in Days)` field, save your changes after enabling ideas, and then click **Edit** on the Ideas Settings page.

- Click **Save**.

Creating and Editing Zones


Zones are shared by the Ideas, Answers, and Chatter Answers applications, allowing you to view and create zones from those locations. Answers can only have one zone displayed at a time. Supported editions allow up to 50 zones per organization.

To create a new zone or edit the details of an existing zone:

- From Setup, enter `zones` in the `Quick Find` box, then select **Zones** under **Answers**, **Ideas Zones**, or **Chatter Answers Zones**.
- Click **Edit** next to the zone you want to change or **New** to create a new zone.
- Enter a unique name for your zone that clearly identifies the zone's purpose.
- Optionally, enter a description in plain text. HTML and other markup languages are not supported.
- Select the `Active` checkbox to display the zone to your community.

You can't delete zones, so if you need to hide a zone, make sure `Active` isn't selected. All active zones are automatically available from the Ideas tab, but you can only assign one active zone to Answers.


- Select the `Username Format` to specify how usernames appear in posted questions and answers throughout the zone. Chatter Answers uses the Username Format for questions and answers only. Ideas uses the Nickname for usernames within a community rather than the Username Format within in a zone.

 **Note:** For Chatter Answers, first names are used for users in the Customer Support Agents Group even if Nickname is selected as the Username Format for the zone.

- Specify where you want this zone displayed.

- `Community` lets you select a community in which to display the zone. For Chatter Answers only, you can also select **Visible Without Authentication** to allow guest users to view activity within the zone through the community without signing in.
- `Internal Only` displays the zone to internal users only. Portal and Salesforce Communities members can't see internal zones.
- `Portal` lets you select from a list of existing portals.

To make a zone publicly available, you must select the Customer Portal that you plan to expose publicly using Force.com sites. Chatter Answers is supported on Force.com sites. Answers isn't supported on Force.com sites.

 **Note:** If you re-assign a zone to another community, the items associated with that zone move to the new community, as well. Users who are logged in to the original community can't view the items that have been moved to the new community,

EDITIONS

Available in: Salesforce Classic

Ideas zones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Answers zones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions

Chatter Answers zones available in: **Professional, Enterprise, Performance, Unlimited,** and **Developer** Editions


USER PERMISSIONS

To create or edit a zone:

- "Customize Application"


including from the Recent Items section of the sidebar column. If the zone is moved back to the original community, the ability to view those items is restored.

8. To set up zones for Chatter Answers, follow these steps:

- a.** Select `Enable for Chatter Answers` to associate the zone with Chatter Answers.
- b.** Select `Enable Private Questions` to let customers post their questions privately to customer support (create cases). If you don't select this setting, support agents can still initiate private communications with customers.
- c.** In `Visualforce Page That Hosts Your Zone's Feeds`, click  and choose the Visualforce page on which questions, replies, and knowledge articles display.


The page you choose must include either the `chatteranswers:allfeeds` component or a combination of the following components: `chatteranswers:aboutme`, `chatteranswers:guestsignin`, `chatteranswers:feedfilter`, `chatteranswers:feeds`, `chatteranswers:searchask`, `chatteranswers:datacategoryfilter` so that the zone is linked to your Force.com site correctly. If you don't choose a Visualforce page, one is automatically generated when you save your zone. The generated page includes your zone's ID so that topics, questions, and replies are associated with your specific zone and can display on it. The page is named after your zone with a suffix of "_main," for example, `ZoneName_main`. The page also includes a language attribute that matches your organization's default language.

You can use the `NoSignIn` Boolean attribute in the `chatteranswers:allfeeds`, `chatteranswers:aboutme`, `chatteranswers:feeds` or `chatteranswers:searchask` components to remove all sign-in links from your zone. Use this option when you have an external sign-in path and want to ensure that your users follow it instead of the standard Chatter Answers sign-in. When the `NoSignIn` Boolean attribute is `true`, users can still search and view publicly accessible content for the zone. If they already have a valid session, they can still post questions, replies, vote, and flag content.


- d.** In `Site That Hosts Your Zone`, click  and choose the Force.com site on which you want to host the zone.
 - If you associated the zone with a portal, you can enter a Force.com site domain.
 - If you associated the zone with a Salesforce Community that does not require authentication for users to view zone activity, we populate the Force.com site domain for you.

- e.** Optionally, in `Email Notification URL`, customize the URL that's included in email notifications sent from the zone.

The email notification URL is generated automatically to be adapted to the visibility settings of the zone, but it can be modified to fit specific needs or use cases. If you have a customized login page, enter its URL. For example, if you've created a login page from which users can access multiple zones, you can customize `Email Notification URL` to redirect users to that page from email notifications.

 **Note:** If you have an existing URL for email notifications for an internal zone and subsequently set up a custom domain using My Domain, you must manually update the Email Notification URL. To update the URL, clear the existing URL so that the field is blank. Save the page, and the system populates the field with the new My Domain URL.

- f.** In `Customer Support Agents Group`, select the public group of users who will act as support agents for the zone. These users will have a headset icon next to their username in the zone.

- g.** Optionally, in `Header` or `Footer`, click  and choose a text or HTML file that incorporates your organization's branding into the headers or footers of email notifications sent from the zone.

You can only choose a file that has been uploaded to a publicly accessible folder on the Documents tab and marked `Externally Available Image`. The files you include in the fields can have a combined size of up to 10 KB.

- h.** Select the data categories that you want exposed to the zone from the list of pre-defined data categories.

9. To set up Ideas for the zone, use the `Experts` `group` field to select the public group of experts who will monitor the zone for Ideas.
10. Click **Save**.


Define Picklist Values for the Categories and Status Fields

Overview

For members of a zone to assign categories to an idea or be able to view an idea's status, the Ideas administrator needs to define picklist values for the `Categories` and `Status` fields. These fields are only available in an ideas community and not in an answers community.

Categories are administrator-defined values that help organize ideas into logical sub-groups within a zone. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the `Categories` picklist on the Post Ideas page lets users add categories to their ideas.


An idea's status helps zone members track the progress of the idea. For example, "Under Review", "Reviewed", "Coming Soon", and "Now Available" are common status values an administrator can define and assign to ideas. An idea's status appears next to the idea's title for all zone members to see.

 **Note:** If the `Category` field is displayed (instead of `Categories`), then your zone members can only assign a single category to an idea. To allow them to assign multiple categories to an idea, from Setup, enter `Ideas Settings` in the Quick Find box, then select **Ideas Settings** and enable `Categories`.


Defining Picklist Values

To define picklist values for the `Categories` and `Status` standard fields:

1. From Setup, enter `Ideas` in the Quick Find box, then select **Fields** From the management settings for ideas, go to Fields.
2. Click **Edit** next to the `Categories` or `Status` standard field.
3. On the picklist edit page, click **New** to add new picklist values to the standard field. You can also edit, delete, reorder, and replace picklist values.

 **Note:** Once you add picklist values to the `Categories` or `Status` field, the field will always require at least one picklist value. This means you can delete picklist values until there is one remaining for the field.

4. Add one or more picklist values (one per line) in the provided text area.
5. Select the zones that you want to include the new picklist values.
6. Save your changes.
7. To specify a default value for the `Categories` or `Status` fields, see [Select Picklist Values and Defaults for a Zone](#).

 **Note:** Do not use the **Edit** link on the Fields page to specify a default value for `Categories` or `Status`. You can only specify a default value from the Zone Detail page.

8. To display an idea's status to zone members, select the `Status` field and drag it to the Additional Information section. You can find this field from Setup by entering `Ideas` in the Quick Find box, then selecting **Fields**.

Once you select this checkbox, you can assign a status to any idea when you post a new idea or edit an existing idea.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To define picklist values:

- "Customize Application"

Creating Validation Rules to Prevent Offensive Language

If you want to prevent community members from using offensive language when posting an idea or comment, you can create validation rules that prevent specific words from being posted.

1. From Setup, navigate to the validation rules page for the right object. From Setup, enter *Idea* or *Idea Comment* in the **Quick Find** box, then select **Validation Rules**.

Validation rules on ideas control the idea title and description. Validation rules on idea comments control the comments themselves.

2. Click **New** in the Validation Rules related list.
3. Enter a name for the rule, and select **Active** to activate the rule.
4. Refer to the following table to complete the validation rule, replacing the words *darn* and *dang* with the words you want to block
For titles or descriptions:

Field	Value
Description:	Prevents users from entering offensive language in the Title and Description fields when posting an idea.
Formula:	<code>OR (CONTAINS (Title, 'darn'), CONTAINS (Body, 'darn'))</code>
Error Message:	Idea title or description contains offensive language.

For comments on ideas:

Field	Value
Description:	Prevents users from entering offensive language when posting a comment.
Formula:	<code>OR (CONTAINS (CommentBody, 'darn'), CONTAINS (CommentBody, 'dang'))</code>
Error Message:	Comment contains offensive language.

5. Click **Save**.

Idea Reports

Create custom report types so users can create reports about ideas, idea comments, and votes.

As an administrator, you can create custom report types so users can analyze what happens to ideas. Custom report types are the only way to make idea reports available for your users—Salesforce does not provide sample idea reports or a standard report folder for ideas.

To create a folder of idea reports for your users:

1. Create a custom report type for ideas.

If you create a custom report type that uses Ideas as the primary object and Votes as the secondary object, child (merged) ideas will not appear in the report unless you select "A" records may or may not have related "B" records. Child ideas have no votes because their votes are transferred to the master idea. This means child ideas do not appear in a report if the Votes object is required.

2. Create a new public folder for idea reports. This step requires the "Manage Public Reports" permission.
3. Using your custom report type, create one or more new custom reports for ideas. Assign the reports to the new idea reports folder you created.

After completing these steps, a folder of idea reports will be available to your users on the Reports home page.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create or update custom report types:

- "Manage Custom Report Types"

To delete custom report types:

- "Modify All Data"

IDEAS ADMINISTRATION

After you set up Ideas, there are a few administration tasks you may need to perform on an ongoing basis:

- Merge duplicate ideas
- Assign status to ideas
- Monitor new ideas and comments for offensive language and inappropriate content

Merging Ideas

As more users contribute to a zone, the number of duplicate ideas often increases. Duplicate ideas make it difficult to measure feedback because votes and comments are spread out over many similar ideas. The best way to resolve this issue is to merge duplicate ideas together so one idea becomes the master to one or more child ideas.

Note the following about merging ideas:

- Once you merge ideas they cannot be separated.
- All votes belonging to child ideas are transferred to the master idea. If the same community member votes for two ideas that are eventually merged, only the vote for the master idea is kept; the vote for the child idea is discarded.
- Users can only vote for and add comments to a master idea.
- You cannot merge ideas in separate zones.
- Deleting a parent idea automatically deletes all child ideas. Child ideas cannot be deleted individually.
- The master idea does not inherit the status and category values of its child ideas.
- When an idea is merged and becomes a child idea, the child idea still appears on the Ideas Submitted page but not on any other pages in a zone member's [Recent Activity](#).
- Merged ideas don't appear in the list of submitted ideas on the Idea Themes detail page and aren't counted in the `Submitted Ideas` field.
- When you merge a child idea, you can no longer edit the Idea Theme field.
- A child idea that has been merged is still visible to the user who submitted the idea from the Ideas Submitted list on the user's Recent Activity page.

To locate duplicate ideas and merge them together:

1. On the Ideas tab, click the title of an idea that you want to merge.
2. On the idea's detail page, click **Find Duplicates**. Salesforce searches all the ideas within the zone and displays the five ideas with titles that most closely match the current idea's title.
3. If the Possible Duplicates list does not contain any ideas that you want to merge, enter keywords in the `Search for Duplicates` field and click **Search**. Salesforce displays a new list of possible duplicate ideas.
4. From the Possible Duplicates list, select the ideas that you want to merge.
To view the details of a possible duplicate idea, click the idea's title. Use your browser's back button to return to the search results.
5. Click **Merge with Current Idea**.
6. Select the idea that you want to be the master idea, and click **Merge**.
7. Click **OK** to complete the merge.

Assigning a Status to Ideas

After an idea goes through your organization's review process, you can update the status of the idea so zone members can keep track of its progress. Before proceeding, make sure picklist values are defined for the Status field. For more information, see [Define Picklist Values for the Categories and Status Fields](#) on page 8.

To assign a status to an idea:

1. On the Ideas tab, select the appropriate zone from the Zone list at the top of the page.
2. Locate the idea you want to update. You can use the search box in the sidebar to search for the idea by title.
3. Click the title of the idea, and then click **Edit**.
4. In the `STATUS` drop-down list, select a status for the idea.
5. Click **Apply**. The status appears next to the idea for all zone members to see.

Monitoring New Ideas and Comments

As the Ideas administrator, you should regularly monitor new ideas and comments to make sure the content is appropriate. Some tasks you should perform on a recurring basis include:

- Delete ideas or comments that contain spam or offensive language.
If offensive language continues to be a problem, you can create a validation rule that prevents community members from using specific words when posting ideas and comments. See [Creating Validation Rules to Prevent Offensive Language](#) on page 9.
- Remove community members that post inappropriate content on a recurring basis.
- Post a comment to provide official information or additional detail that you want members to know about. We recommend you identify yourself as a community expert when posting comments.

The best way to monitor new postings is to regularly review the Recent Ideas and Comments tabs.

Managing User Reputations

Reward the most influential and innovative members of your Ideas community by acknowledging their participation and contribution to the community. By enabling Reputation in Ideas, and then choosing level names and thresholds, you let users earn points and ratings that reward and encourage frequent, meaningful activity in the community. As community members engage more frequently, they improve the overall quality of ideas, which means that everyone reaps the benefits of a vibrant, creative partnership with your customers.

Users are awarded points for many activities including:

- Creating an idea
- Receiving a comment on their idea
- Receiving an upvote on their idea or comment
- Commenting on someone else's idea

Reputation points are calculated separately for each zone, and for the cumulative activity within the entire organization. Users who participate in different zones will have different reputation values for each zone based on their activity in that zone. When users are logged into the internal application, their reputation score is based on their participation in all zones to which they belong.


Ideas comes with the following pre-defined reputation levels that apply to all zones and to the internal application. Using the API, reputation levels and points for each level can be added or edited to reflect the levels of participation in your community.

Name	Points per Level
Observer	0 – 99
Contributor	100 – 399
Influencer	400 – 1499
Thought Leader	1500+

By default, users earn points based on the following activities:

Activity	Points Earned
Creates an idea	5
Receives a comment on their idea	2
Receives an upvote on their idea	10
Receives a downvote on their idea	-5
Comments on someone else's idea	1
Receives a like on their comment	1
Votes someone else's idea up	0
Votes someone else's idea down	0

Reputation levels are available through the API and can be displayed in custom Ideas implementations. To add or edit reputation level names, points per level, or other attributes of a reputation in any of your zones, use the `IdeaReputation` and `IdeaReputationLevel` objects in the API. You can create up to 25 different reputation levels for each zone.

 **Note:** Reputation for Ideas is available using the API starting with Summer '13. Once the feature is enabled in Setup, Salesforce tracks reputation from that point. To calculate historical user activity data created before Summer '13 so that it can count toward reputations, contact [Salesforce.com](https://www.salesforce.com).

IDEA THEMES

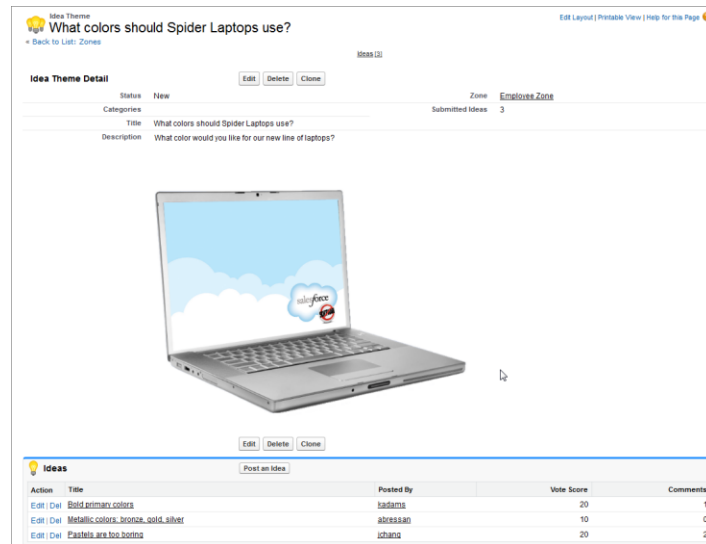
Idea Themes lets you invite community members to post ideas about specific topics so that members can solve problems or propose innovations for your company. For example, to engage with your community and create excitement around the launch of a new product, you can ask members to work together to create the product's name. Community members collaborate and add ideas to the idea theme, while you monitor their activities as they vote and comment on each other's ideas until they find a winner.

When you create an idea theme, you can add pictures, videos, and other multimedia content to showcase or explain the idea that you're presenting to the community. You can also view and manage the list of ideas that have been posted to the idea theme.

EDITIONS

Available in: Salesforce Classic

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



Enable Idea Themes

1. From Setup, enter *Idea Themes Settings* in the Quick Find box, then select **Idea Themes Settings**.
2. Click **Edit**.
3. Select **Enable Idea Themes**.
4. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To customize Idea Themes settings:

- "Customize Application"

Creating and Editing Idea Themes

You can use the Idea Themes tab in both the application and the console to create and edit Idea Themes for the communities that you manage.

1. Click **New Idea Theme** from the Idea Themes list view page or click **New** from the Recent Idea Themes list on the Idea Themes overview page.
2. Select a zone for the idea theme and click **Continue**.
3. Select the idea theme's **Status**.
4. Select a category for the theme.
5. Add a title for the idea theme.
6. Optionally, enter a description of the theme.
Use the HTML editor to format your text or add an image or video.
7. Click **Save**.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view the Idea Themes tab:

- "Read" on Idea Themes

To create Idea Themes:

- "Create" on Ideas

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