



Chatter Answers Implementation Guide

Salesforce, Spring '17




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INTRODUCTION TO CHATTER ANSWERS

Ensuring your customers' questions are answered quickly and accurately is critical to maintaining your brand's reputation. With Chatter Answers, you can strengthen your brand by increasing your service and support presence online.


 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Salesforce service communities offer a ton of great ways to enable your customers to engage with one another and solve problems. Through service communities, you can set up official support channels to handle customer cases as well as self-support channels so your customers can find answers or get help from the community. You can set up Cases, Live Agent, Knowledge, Chatter Answers, and Ideas to provide a support community for your customers.

Chatter Answers is one of many Service Cloud tools you can use to enable your customers to help each other.

What is Chatter Answers?

Chatter Answers is a self-service support community where users can post questions and receive answers and comments from other users or your support agents.

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Chatter Answers combines questions and answers with Salesforce Knowledge to allow your customers to be their own tier-one support. Salesforce Knowledge lets customers search for knowledge articles that can resolve their issues. You can also set up Chatter Answers with Cases to enable your customers to take their questions from the community straight to your service organization.

Chatter Answers lets service organizations:

- Create multiple communities and organize them into different zones, with each zone having its own focus and questions.
- Brand and customize communities.
- Give agents the opportunity to respond to customers publicly or privately.
- Automate the creation of cases from questions using an Apex trigger and workflow rules.
- Deflect customer inquiries through participation.
- Encourage participation by publicly displaying user statistics.
- Moderate questions and answers from the Q&A tab in the internal Salesforce application or from the community.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

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Chatter Answers lets your customers:

- Post, browse, and reply to questions using the Q&A tab.
- Delete their own questions and replies.
- Flag questions and replies as spam, hateful, or inappropriate.
- Receive emails when their questions are answered or when best answers are chosen for questions they're following.
- Collaborate publicly or privately with support agents to resolve issues related to open cases.
- Search and review articles from Salesforce Knowledge.
- Like a post or Salesforce Knowledge article to help determine its popularity.
- Upload photos of themselves to their user profiles.
- View other users' total number of posts and number of replies marked as best answers by others.

Chatter Answers Terminology

Understanding important terms for Chatter Answers will help you plan your Chatter Answers implementation.

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The following terms are used when describing Chatter Answers features and functionality.

Answers

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.

Article

Articles capture information about your company's products and services that you want to make available in your knowledge base.

Best Answer

When a member of an answers community asks a question and other community members post a reply, the asker can mark one of the replies as the best answer. The best answer then appears directly under the question (above the other replies). Identifying the best answer helps other community members with the same question quickly find the most relevant, useful information.

Flag

An icon that users can click on a question or reply to report it as spam, hateful, or inappropriate.

Follow

A subscription to a question that lets you receive emails when someone answers or comments on a specific question.

Like

To show support or indicate quality or usefulness for a question, answer, or knowledge article.

Popular

Each question's popularity is based on the number of users who **Like** it within a certain amount of time.

Question

An issue posted to an answers community. When a community member asks a question, other community members post replies to help resolve the question.

Question, Private

An issue posted to an answers community, but marked **Private** so that only support agents can view and respond to it.

Reply

The response to a question in an answers community. When community members reply to a question, the person who asked the question can mark one of the replies as the best answer to resolve and close the question.

Topics

The sidebar that lists data categories from which your customers can browse questions and replies. For example, if you have a zone for hardware products, your topics may include laptops, desktops, and printers.

Vote, Reply


In an answers community, a vote means you either like or dislike a reply to a question.

Zones

Zones organize ideas and questions into logical groups, with each zone having its own focus and unique ideas and questions

PLANNING YOUR CHATTER ANSWERS IMPLEMENTATION

Making important decisions about the service community you'd like to create before you begin setting up will help you implement Chatter Answers efficiently and successfully.

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When you plan your Chatter Answers implementation, you must choose a Chatter Answers community model and answer important questions about the setup and the level of branding you'd like in your service community.

IN THIS SECTION:

[Choosing a Chatter Answers Community Model](#)


The first step to setting up Chatter Answers is to choose a community model. Knowing which model to use helps you determine what you need to set up.

[Chatter Answers Implementation Planning Questions](#)

Before you begin setting up Chatter Answers, it's important to consider setup questions about administrators, users, language, and integrations with other Service Cloud features.

Choosing a Chatter Answers Community Model

The first step to setting up Chatter Answers is to choose a community model. Knowing which model to use helps you determine what you need to set up.

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The biggest decision to make in planning your Chatter Answers implementation is deciding what kind of user community you want. What kind of people do you want to bring together? Customers? Partners? Employees? Some combination of these groups?

There are a few ways you can set up Chatter Answers, and you can set up multiple Chatter Answers zones for different Chatter Answers service communities. In general, for each Chatter Answers community you set up, you should consider the group you want serve and the level of authentication required to access the Chatter Answers community.

Chatter Answers for a public community

If you want a public community that's heavily branded and is part of your web presence, then you need to plan for a public community. For an example of a public community, see the Salesforce Success community.

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Chatter Answers for a private community

If you want a place for customers, partners, and employees to collaborate with each other, but you want most or all of that experience and information to be behind a login, then you should plan for an authenticated community. For example, you might want to set up a private community for your partners or for a specific event.


Chatter Answers for an internal community

If you’re looking to help your internal Salesforce users collaborate and answer questions, then you can plan an internal only community. For example, you might want to set up an internal Chatter Answers community for employees about employee benefits.

Community Model	Brings Together	Access Level	Must Have	Level of Branding
Public	Customers, anyone interested in the community	Public. Users can self-register.	A Salesforce Community (best practice) or A Salesforce Customer Portal enabled prior to Winter '14	Complete control of branding with Visualforce pages, a Site.com site, or a Force.com site.
Private	Customers, partners, or employees	Public but requires authentication. Users can self-register, or you can restrict access to selected groups of users.	A Salesforce Community (best practice) or A Salesforce Customer Portal enabled prior to Winter '14	Out-of-the-box community but can customize with Visualforce pages, a Site.com site, or a Force.com site.
Internal	Internal users of a Salesforce organization	Private. Requires authentication of registered users.	A Salesforce Sales Cloud or Service Cloud organization. Users must have access to the Q&A tab.	Can customize by creating additional tabs in your organization with Visualforce pages.

Chatter Answers Implementation Planning Questions

Before you begin setting up Chatter Answers, it’s important to consider setup questions about administrators, users, language, and integrations with other Service Cloud features.

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The answers to some of these questions are prerequisites to completing critical setup tasks for Chatter Answers.

Who will implement Chatter Answers for your organization?

Chatter Answers is 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. Unlike other Salesforce features, Chatter Answers spans across several areas of setup. There isn’t one location in

Salesforce where you can update and configure all the settings related to Chatter Answers. We recommend that advanced Salesforce administrators and developers set up and maintain Chatter Answers, as it involves several Salesforce features. See [Setting Up Chatter Answers](#).

Have you purchased enough Chatter Answers User licenses to support your customers?

Portal users must have a Chatter Answers feature license to use Chatter Answers. After you set up Chatter Answers as described in this guide, the feature license is automatically assigned to high-volume portal users who self-register for Chatter Answers. You can manually assign the license to users who don't self-register by editing a user and clicking `Chatter Answers User`. See [Setting Up Chatter Answers](#) on page 9.

Which language do you want your Chatter Answers zone to support?

Chatter Answers is designed to support one user language for each zone that you create. When you [enable Chatter Answers](#), the Visualforce pages automatically added to your organization inherit your organization's default language. However, you can change the language attribute on each Visualforce page. Users who self-register for your zone inherit your organization's default language. Guest users view your zone in the language specified in the Visualforce pages, no matter the language chosen for their browsers. See [Setting Up Chatter Answers](#) and [Visualforce Pages for Chatter Answers](#) on page 25.

Do you want to create more than one Chatter Answers zone?

You can create a zone for each product you want to support. If you create multiple zones, your portal users have access to all of them. Each question a user creates is associated with the zone in which it's posted, and the zone name is added to each question so that users and support agents can see where it originated. Users can view all of the questions they've posted to your zones by clicking **My Questions** from any zone. You only need one Force.com site and one Customer Portal to support multiple zones. See [Setting Up Chatter Answers](#) on page 9 and [Creating and Editing Zones](#).

Do you want to customize the look and feel of your Chatter Answers zone?

You can customize the appearance of your zone to match your company's branding. Just create or update Visualforce pages and add them to the Force.com Site used to host your zone. See the [Visualforce Developer's Guide](#), the [Force.com Sites Implementation Guide](#), and [Visualforce Pages for Chatter Answers](#) on page 25.

Do you want Salesforce Knowledge articles to display in your Chatter Answers zone?

If you want your zone's search results to return knowledge articles, then you must set up Data Categories and Salesforce Knowledge (if you haven't done so already) and configure them both for Chatter Answers. See the [Salesforce Knowledge Implementation Guide](#) and [Configure Salesforce Knowledge for Chatter Answers](#).

Do you want your customers to be able to sign in to your Chatter Answers zone with a Facebook[®] login?

Instead of requiring users to create a Chatter Answers account to post and answer questions, you can encourage participation by letting users sign in with an existing Facebook login. When a user signs in to Chatter Answers with a Facebook login, the first name, last name,

and the photo associated with the Facebook account is used in posts to your zone. Before you can enable this feature, you must define a Facebook authentication provider in your organization's security controls. See "Configure a Facebook Authentication Provider" in the Salesforce online help and [Enable Chatter Answers](#).

Do you want your customers to be able to post questions privately to your support team?

You can configure your Chatter Answers zone so that users have the option to post their questions directly to your support team (and create cases) instead of posting their questions publicly on the Web. See [Creating and Editing Zones](#).

Do you want to escalate customers' questions to cases automatically?

Once you enable Chatter Answers, one Apex trigger and two workflow rules for questions are added to your organization so that you can customize when questions are escalated to cases for your support team to answer. By default, the rule criteria is based on the number of followers on a question as well as whether there's a best reply to a question by a specified time. See "Manage Apex Triggers" and [Manage Automated Actions in Workflow Rules](#).

When do you want to send your customers email notifications from your Chatter Answers zone?

You can choose when to send email notifications to users, such as when other users reply to their questions or when a best answer is selected for a question they're following. See [Configuring Email Notifications for Chatter Answers Users](#).

Do you want to customize the look and feel of email notifications sent from your Chatter Answers zone?

You can customize the headers and footers of email notifications sent from specific zones. For example, you can add your organization's branding to the header of every notification sent from one zone, and add different branding to the footer of notifications sent from another zone. To begin, simply upload a custom HTML file to your organization's Documents tab. See [Creating and Editing Zones](#).

Do you want your support agents to moderate and review questions posted to your Chatter Answers zone?

You can add the Q&A tab to your Salesforce organization so that your support team can:

- Review lists of questions.
- Answer questions or add replies to questions.
- Escalate a question to a case.
- Delete questions or replies.
- Select best answers for questions.
- Promote helpful replies to Salesforce Knowledge articles.

 **Note:** Users without Salesforce licenses cannot moderate Chatter Answers feeds.

See [Setting Q&A Tab Visibility](#).

Do you want to customize reports so Salesforce users can view snapshots of Chatter Answers data?


Use custom report types to define report criteria from which users can run and create reports on questions and replies posted to your Chatter Answers zone. See [Reporting on Chatter Answers](#) on page 32.

Do you want to review a list of additional Chatter Answers details?

Before you begin your implementation, we suggest that you review a list of tips, best practices, and limitations that go beyond the scope of the questions above. See [Implementation Tips and Best Practices](#) on page 19.

SETTING UP CHATTER ANSWERS

Setting up Chatter Answers has some prerequisites and some of the setup tasks should be completed in a specific order.

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Before you set up Chatter Answers, see [Planning Your Chatter Answers Implementation](#) to answer common questions related to setup.

Before you set up Chatter Answers, you must have:

- A Salesforce Community or a customer portal enabled before the Winter '14 release
- Data Categories set up for your organization

You can also review [Implementation Tips and Best Practices](#) before you set up Chatter Answers for your organization.

Unlike other Salesforce features, Chatter Answers spans across several areas of setup. There isn't one location in Salesforce where you can update and configure all the settings related to Chatter Answers.

 **Note:** We recommend that advanced Salesforce administrators and developers set up and maintain Chatter Answers, as it involves several Salesforce features.

We recommend that you follow these setup tasks in this sequence:

1. [Enable Chatter Answers](#)
2. [Create a Chatter Answers Zone](#)
3. [Assign Data Categories to Chatter Answers](#)
4. [Set Up Chatter Answers Users](#)
5. [Set the Q&A Tab Visibility](#)
6. [Configure Email Notifications for Chatter Answers Users](#)

If you run into any issues during Chatter Answers setup, see [Troubleshooting Chatter Answers Setup](#).

After you've set up Chatter Answers, consider customizing the service community experience for your Chatter Answers users.


For information, see [Customizing Chatter Answers](#).

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Enable Chatter Answers

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Enable Chatter Answers to set up Chatter Answers zones.

1. From Setup, enter *Chatter Answers Settings* in the Quick Find box, then select **Chatter Answers Settings**.
2. Click **Edit**.
3. Select **Enable Chatter Answers**.
4. Optionally, select:

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USER PERMISSIONS

To enable Chatter Answers:

- "Customize Application"

Option	Description
Show Chatter Answers in Portals	Lets you add Chatter Answers as a tab to your Customer Portal or Partner Portal. If you choose this option, you must add the Chatter Answers tab to each portal and assign the Chatter Answers User license to portal users. If you only want to display Chatter Answers in your portals, then you don't need to set up a Force.com site to host Chatter Answers. However, a site lets guest users access some Chatter Answers data without a login, whereas portals do not.
Optimize Question Flow	Lets users filter search results by articles or questions before they post a question to any of your Chatter Answers zones. Also, adds Title and Body fields to questions for easier text input and scanning. This setting is turned on automatically when you enable Chatter Answers.
Enable Rich Text Editor	Lets zone members use the rich text editor to format text and upload images when posting questions and replies. This setting is turned on automatically when you enable Chatter Answers.  Note: Optimize Question Flow must be enabled to select this option.
Show Search/Ask Publisher Inline	Embeds the Search/Ask Publisher inline instead of using a pop-up window.  Note: Optimize Question Flow must be enabled to select this option.
Enable Reputation	Lets users earn points and ratings that display as hover text on their profile pictures. Reputation is enabled across all zones. This

Option	Description
Allow Posting Answers via Email	setting is turned on automatically when you enable Chatter Answers.
Enable Facebook Single Sign On	<p>Lets users sign in to your Chatter Answers zones with their Facebook logins. If you choose this setting, your zones display an option to <code>Sign in with Facebook</code> next to your zones' <code>Sign In</code>. When a user signs in to Chatter Answers with a Facebook login, the first name, last name, and the photo associated with the Facebook account is used in posts to your zones.</p> <p>When you enable this feature, you must define and enable a Facebook authentication provider in your organization's security controls.</p>
Facebook Authentication Provider	<p>Lets you choose an existing Facebook authentication provider after you select <code>Enable Facebook Single Sign On</code>. You must choose a Facebook authentication provider to implement Facebook Single Sign On for your Chatter Answers zones. This setting is ignored if you have associated the Chatter Answers zone to a Chatter community with a different Facebook authentication provider.</p>
Custom Profile Page	<p>Lets you select a custom Visualforce page for users' profiles for Chatter Answers on a public Chatter community site. You must have Visible without authentication set for the zone in order for the user profile pages to be used. The following attributes are passed to the custom Visualforce page that you select:</p> <ul style="list-style-type: none"> • <code>communityId</code>. This attribute indicates which zone the currently selected feed item, such as a question or a reply, belongs to. • <code>userId</code>. This attribute indicates the owner of the currently selected feed item, such as a question or a reply. • <code>showHeader</code>. This attribute is a Boolean value that specifies whether the Salesforce tab header is included in the page. If this attribute is set to true, the Salesforce tab header is displayed.

5. Click **Save**.

After you enable Chatter Answers, several items are automatically added to your organization for use with setting up zones:

- A Q&A tab where internal users and administrators can view and use Chatter Answers. Administrators can rename this tab.
- Standard permission settings for Questions on user profiles so that you can grant users permissions to questions and replies.
- Visualforce pages that you can add to a Force.com site, a tab in a Community, or a Customer Portal so that users can register, sign in, and view feed items on a zone.

- An Apex class named `ChatterAnswersRegistration` with a method for customizing Account creation for portal users.
- An Apex trigger for questions named `chatter_answers_question_escalation_to_case_trigger` so that questions with specified attributes are automatically escalated to cases.
- A workflow field update named `chatter_answers_num_subscriptions_above__` so that when a question is escalated to a case, `Priority` on questions is updated.
- Two workflow rules, `chatter_answers_no_best_reply_within_time_limit_wf` and `chatter_answers_num_subscriptions_above_limit_wf`, which you can customize and activate so that questions without best replies or questions with a specified number of followers are automatically escalated to cases.


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:

1. From Setup, enter `zones` in the `Quick Find` box, then select **Zones** under **Answers**, **Ideas Zones**, or **Chatter Answers Zones**.
2. Click **Edit** next to the zone you want to change or **New** to create a new zone.
3. Enter a unique name for your zone that clearly identifies the zone's purpose.
4. Optionally, enter a description in plain text. HTML and other markup languages are not supported.
5. 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.
6. 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.
7. 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:categoryfilter` 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**.

Assigning Data Categories to Chatter Answers


 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Assign a data category group to Chatter Answers so that it's available to all of your Chatter Answers zones. You configure each zone with a top-level data category (topic) in which customers and support agents can categorize and filter questions and knowledge articles.

1. From Setup, enter *Data Category Assignments* in the `Quick Find` box, then select **Data Category Assignments** under Chatter Answers.
2. Click **Edit**.
3. Select a category group.
4. Click **Save**.

 **Note:** Each zone in Chatter Answers can be associated with a top-level category. For a zone to be visible to a customer, the customer's user profile must have visibility to that zone's top-level data category. In addition, if a customer has visibility to child data categories but not to the top-level data category associated with a zone, the zone won't be visible to them.

Setting Up Chatter Answers Users

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Because Chatter Answers integrates several features with the Customer Portal, managing Chatter Answers users is similar to managing Customer Portal users. Use the following to manage the data and functions that are accessible to Chatter Answers users:

- Profiles, permissions, and access settings determine a user's permission to perform different functions, such as adding comments to a case.
- User licenses define which profiles and permission sets are available to a user, such as the High Volume Customer Portal (Service Cloud Portal User) or Customer Portal Manager Custom license.
- Feature licenses entitle a user to additional Salesforce features, such as Chatter Answers.
- Field-level security defines which fields users can access, such as fields on Salesforce Knowledge articles.
- [Sharing sets](#) let you selectively grant record access to defined groups of high-volume portal users.

Chatter Answers excludes some features typically available to Customer Portal users, such as:

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To assign data categories to Chatter Answers:

- "Customize Application"

- Ideas
- Groups
- Teams
- Reports
- Content
- Page layouts
- Custom objects
- Delegated external user administration
- Customer Portal role hierarchy (available, but not used)
- Customer Portal sharing rules, except for high-volume portal users


Chatter Answers users can only access the following records from your zone:

- Cases
- Questions
- Replies (answers)
- Salesforce Knowledge articles


Chatter Answers is designed to support one user language for each zone that you create. When you [enable Chatter Answers](#), the Visualforce pages automatically added to your organization inherit your organization's default language. However, you can change the language attribute on each Visualforce page. Users who self-register for your zone inherit your organization's default language. Guest users view your zone in the language specified in the Visualforce pages, no matter the language chosen for their browsers.


 **Note:**

- Chatter Answers users can't change their language, timezone, or locale settings.
- Portal users must have the Chatter Answers User feature license to use Chatter Answers. This feature license is automatically assigned to high-volume portal users who self-register for Chatter Answers. You can manually assign the license to users who don't self-register by editing a user and clicking `Chatter Answers User`.
- Authenticated Website User profiles don't have access to Chatter Answers.

 **Tip:** For information on managing and working with Customer Portal users, see ["About Customer Portal User Management"](#) and [Working with Customer Portal Users](#).

Configuring a Customer Portal for Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

 **Note:** Even if you don't plan on using a Customer Portal, you must configure one for Chatter Answers to authenticate users who sign in to your Chatter Answers zone.

1. From Setup, enter *Customer Portal Settings* in the Quick Find box, then select **Customer Portal Settings**.
2. Click **Edit** next to the Customer Portal you want to configure for Chatter Answers.
3. Click **Login Enabled** to let customers sign in to Chatter Answers.
4. In **From Email Address**, type the address from which all email communications from your Chatter Answers zone are sent. For example, support@acme.com.
5. In **From Email Address Name**, type the name associated with the **From Email Address**. For example, Acme Customer Support.
6. Click **Self-Registration Enabled** to let customers register themselves for access to Chatter Answers.
7. In **Default New User License**, choose the portal user license that's automatically assigned to customers who self-register. We recommend you choose the High Volume Customer Portal license.
8. In **Default New User Profile**, choose the profile that's automatically assigned to customers who self-register. We recommend you [choose the profile you cloned and customized for self-registration](#).
9. Click **Save**.
10. Assign the profile you selected as the **Default New User Profile** to your Customer Portal so that users can sign in to your zone:
 - a. From Setup, enter *Customer Portal Settings* in the Quick Find box, then select **Customer Portal Settings**.
 - b. Select your portal's name.
 - c. In the Assigned Profiles section, click **Edit Profiles**.
 - d. Click **Active** next to the profile you selected as the **Default New User Profile**.
 - e. Click **Save**.

EDITIONS

Available in: Salesforce Classic


Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To set up and update the Customer Portal:

- "Customize Application"

Configuring Portal Users for Self-Registration to Chatter Answers

-  **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Configure Customer Portal users for self-registration to your Chatter Answers community.

1. Clone the High Volume Customer Portal profile so that you can customize it:
 - a. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
 - b. Click **Clone** next to High Volume Customer Portal.
 - c. Type a name for the new profile.
 - d. Click **Save**.
2. Customize the cloned profile to include permissions to the standard objects on your community:
 - a. From Setup, enter *Profiles* in the **Quick Find** box, then select **Profiles**.
 - b. Click the name of the cloned profile.
 - c. Click **Edit**.
 - d. In Standard Object Permissions, click on the following permissions to these objects:

Object	Permissions
Cases	Read, Create
Contacts	Read
Questions	Read, Create
Account	Read

- e. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS


To set up and update the Customer Portal:

- "Customize Application"

To manage Customer Portal users:

- "Edit Self-Service Users"

Configuring Email Notifications for Chatter Answers Users

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Determine when emails are sent to users by configuring the notification settings that apply to all of your zones. Each email includes a link to a specific zone so that users can easily return to it.

1. From Setup, enter *Email Notification Settings* in the Quick Find box, then select **Email Notification Settings**.
2. Click **Edit**.
3. Choose from the following settings:

Option	Description
Replies to a question they own	Notify customers when other users reply to their questions.
Replies to a question they follow	Notify customers when other users reply to questions they're following.
Selects a best answer on a question they follow	Notify customers when a best answer is selected for a question they're following.
Sends a private reply to their question (Customer Support)	Notify customers when customer support responds to their questions privately.

4. Click **Save**.

EDITIONS

Available in: Salesforce Classic


Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To configure email notifications for your Chatter Answers users:

- "Customize Application"

Setting Q&A Tab Visibility

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Set the visibility of the Q&A tab to `Default On` so that support agents can view, search, filter, and moderate questions posted to your Chatter Answers zones.

1. From Setup, enter `Profiles` in the `Quick Find` box, then select **Profiles**.
2. Select a support agent profile.
3. Depending on which user interface you're using, do one of the following:
 - Enhanced profile user interface—In the **Find Settings...** box, enter the name of the tab you want and select it from the list, then click **Edit**.
 - Original profile user interface—Click **Edit**, then scroll to the Tab Settings section.
4. Specify the visibility of the Q&A tab to `Default On`.
5. (Original profile user interface only) To reset users' tab customizations to the tab visibility settings that you specify, select **Overwrite users' personal tab customizations**.
6. Click **Save**.

EDITIONS

Available in: Salesforce Classic


Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To set Q&A tab visibility:

- "Manage Profiles and Permission Sets"

Implementation Tips and Best Practices

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Review the following tips and best practices during your Chatter Answers implementation. For more information on any of the items, see the Salesforce online help.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

Implementation Tips

- We recommend that advanced Salesforce administrators and developers set up and maintain Chatter Answers, as it involves several Salesforce features.
- Before administrators can set up Chatter Answers, their organizations must have implemented [Data Categories](#). If you want Salesforce Knowledge articles to display in your zones, then administrators need to implement [Salesforce Knowledge](#).
- You can customize fields, page layouts, buttons and links, Apex triggers, and validation rules for questions and replies for Chatter Answers from Setup by entering "Chatter Answers" in the `Quick Find` box, then selecting **Chatter Answers** and choosing the appropriate setting.

- After you enable Chatter Answers, several items are automatically added to your organization for use with setting up zones:
 - A Q&A tab where internal users and administrators can view and use Chatter Answers. Administrators can rename this tab.
 - Standard permission settings for Questions on user profiles so that you can grant users permissions to questions and replies.
 - Visualforce pages that you can add to a Force.com site, a tab in a Community, or a Customer Portal so that users can register, sign in, and view feed items on a zone.
 - An Apex class named `ChatterAnswersRegistration` with a method for customizing Account creation for portal users.
 - An Apex trigger for questions named `chatter_answers_question_escalation_to_case_trigger` so that questions with specified attributes are automatically escalated to cases.
 - A workflow field update named `chatter_answers_num_subscriptions_above_` so that when a question is escalated to a case, `Priority` on questions is updated.
 - Two workflow rules, `chatter_answers_no_best_reply_within_time_limit_wf` and `chatter_answers_num_subscriptions_above_limit_wf`, which you can customize and activate so that questions without best replies or questions with a specified number of followers are automatically escalated to cases.
- You can add Chatter Answers to an existing Customer Portal or Partner Portal so that portal users can access Chatter Answers zones from one of your established channels.
- Chatter Answers is designed to support one user language for each zone that you create. When you [enable Chatter Answers](#), the Visualforce pages automatically added to your organization inherit your organization's default language. However, you can change the language attribute on each Visualforce page. Users who self-register for your zone inherit your organization's default language. Guest users view your zone in the language specified in the Visualforce pages, no matter the language chosen for their browsers.
- You can rename `Customer Support` on your zones' user interface. For example, you can change "Customer Support" to "Acme Support." Just edit the Customer Support label on the Question object.
- Questions escalated to cases display a Chatter-like feed on case detail pages. The case detail page also includes a Customer View section that lets support agents reply publicly or privately to the thread posted to the zone.
- Case comments marked `Public` display as private messages from customer support in Chatter Answers. They don't display to the entire community. For example, if a support agent adds a public case comment, it displays only to the case's contact private messages in Chatter Answers. Support agents can read all private and public case comments. .
- Chatter Answers sends email to users when they:
 - Sign up for an account.
 - Follow a question (answers or comments).
 - Receive an answer or comment to their question.
 - Receive a private reply to their question from customer support.
- Internet Explorer 8 users receive a security warning if you customize with URLs that don't include `https://`.
- Before you make a zone public, add at least 20 frequently asked questions, answers, or articles. This content will generate conversations.
- Create Salesforce Knowledge articles that contain:
 - Your support organization's phone number so that customers can contact your support agents directly.
 - Terms and conditions for zone members, such as when support agents might delete customers' questions and comments.
- Chatter Answers uses the following API objects:
 - Case
 - ChatterAnswersActivity
 - ChatterAnswersReputationLevel
 - Community (Zone)


- Question
- QuestionReportAbuse
- QuestionSubscription
- Reply
- ReplyReportAbuse

Best Practices

- We recommend that you tell support agents that:
 - The `Case Origin` field lists Chatter Answers on any case converted from a question.
 - If they answer a question privately, they can't convert it to a public answer.
- We recommend that you assign a support agent to review public questions from the Q&A tab. Agents can't click **Flag** next to questions or replies that are spam, hateful, or inappropriate, but they can edit and delete questions or replies from a zones via the Q&A tab if they have the "Delete" permission on questions.
- To moderate many questions quickly, we recommend that support agents review questions from pinned lists on the Salesforce console (this requires adding the Q&A tab to the console's Navigation tab).
- To see a list of cases converted from questions, we recommend that administrators or support agents create a case view where `Case Origin` equals Chatter Answers.
- Because photos added to profiles display externally on Chatter Answers, we recommend that support agents choose photos that match their company's policies and branding.

Escalating a Question to a Case in Chatter Answers

If a question in Chatter Answers isn't resolved or its replies aren't satisfactory, administrators and trusted community members such as moderators can escalate the question to a case.

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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.

To escalate a question to a case:

1. Click the question title.
2. On the question detail page, click **Escalate to Case**.

 **Note:** This button only appears if the user has permission to create cases. Users created from contacts cannot escalate questions to cases.

3. Update the case fields if you want to change any default values. The question title automatically becomes the case subject.
4. Click **Save**. You are returned to the question detail page, and the case is now available for the Case Owner to resolve.

USER PERMISSIONS

To view the Q&A tab:


- "Read" on questions

To ask and reply to questions:


- "Create" on questions

To create cases:



- "Create" on cases


 **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.

Troubleshooting Chatter Answers Setup

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After you set up a Chatter Answers community, you can view a snapshot of all of its configurations on one page so that you don't have to visit several pages in setup to diagnose issues.

1. From Setup, enter *Sites Settings* in the **Quick Find** box, then select **Sites Settings**.
2. In the Site Snapshot column, click **View** next to the Force.com site associated with your community.
3. Click  to show or  to hide various settings.
4. Click **Go!** to go to a specific page in setup where you can change settings.

 **Example:** For example, you can use a site snapshot to see if the Force.com site hosting your community is marked *Active* or to verify the names of the user profiles assigned to your Customer Portal.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS

To view Setup:


- "View Setup and Configuration"

To set up Chatter Answers:

- "Customize Application"

CUSTOMIZING CHATTER ANSWERS

After you've set up Chatter Answers, consider customizing the service community experience for your Chatter Answers users.

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You can enhance your users' experience by adding other service features, such as Cases and Salesforce Knowledge, to Chatter Answers and by customizing Chatter Answers for increasing your company's branding of the service community experience.

IN THIS SECTION:


- [Configuring Cases for Chatter Answers](#)
- [Configure Salesforce Knowledge for Chatter Answers](#)
- [Visualforce Pages for Chatter Answers](#)
- [Configuring a Force.com Site for Chatter Answers](#)

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

Configuring Cases for Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Configure case features for Chatter Answers so that cases are created, escalated, and accessed by the appropriate users of your Chatter Answers zones.

1. Set your organization-wide sharing defaults to `Private` on `Account`, `Controlled by Parent` on `Contact`, and `Private` on `Case` to prevent users from accessing each others' information.
2. Set field-level security on `Question` on cases to `Visible` for profiles assigned to your Customer Portal so that users can access their private questions.
3. Update `Origin` on cases with the value in the `Question` trigger so that support agents can see which cases originated from Chatter Answers.
4. Create a case assignment rule where `Case Origin` equals the value of Chatter Answers so that cases created from private questions are assigned to support agents.
5. [Grant high-volume portal users access to cases](#) so that they can access their private questions on Chatter Answers.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To set organization-wide sharing defaults:

- "Manage Sharing"

To set field-level security:

- "Manage Profiles and Permission Sets"

AND

"Customize Application"


To customize fields:

To create assignment rules:

To grant high-volume portal users access to cases:

- "Customize Application"

Configure Salesforce Knowledge for Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

To display Salesforce Knowledge articles in your Chatter Answers zones, you must:

1. [Implement Data Categories](#) (if you haven't done so already).
2. [Implement Salesforce Knowledge](#) (if you haven't done so already).
3. Configure both for Chatter Answers.

You configure each zone with a top-level data category (topic) in which customers and support agents can categorize and filter questions and knowledge articles.

1. If you use role-based data category visibility, [set the Default Data Category Visibility to All Categories](#) so that customers not included in your organization's role hierarchy, such as high-volume portal users, can access categories that include questions and Salesforce Knowledge articles.

Alternatively, use permission sets or profiles to [set data category visibility](#).

2. [Create one category group for all of your communities](#) so that you're less likely to reach the limit of three active data categories. Then add a child category for each community; and add child categories to those categories to provide topics.
3. [Activate the category group you want available to Chatter Answers](#) so that users can access it.
4. [Grant "Read" permissions to specific article types](#) on the profiles of Chatter Answers users so that they can access articles from your zones.
5. [Optionally, allow support agents to promote replies to draft articles in the knowledge base](#) so that your support team can capture useful information quickly.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To create or edit users:

- "Manage Internal Users"

To create article types and article actions:

- "Customize Application"
- AND
- "Manage Salesforce Knowledge"


To manage synonyms:

- "Manage Synonyms"

To create data categories:

- "Manage Data Categories"

Visualforce Pages for Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

After you enable Chatter Answers, the Visualforce pages below are automatically added to your organization. You can use these pages to set up and configure Chatter Answers.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

Visualforce page	Description
ChatterAnswersAgentView	The Visualforce component that displays questions on case detail pages when questions are converted to cases. This component is optional and offers an alternative to the case detail page.
ChatterAnswersChangePassword	The page where users can change their passwords to your zone.
ChatterAnswersForgotPassword	The forgot password page for your zone.
ChatterAnswersForgotPasswordConfirm	The forgot password confirmation page for your zone.
ChatterAnswersHelp	The online help page displayed to users when they click Need Help?
ChatterAnswersLogin	The login page for your zone.
ChatterAnswersRegistration	The page where users can self-register for access to your zone.
When you create a zone, the following page is added to your organization: <i>Community Name_main</i> (Home Page)	<p>The page that includes the question, reply, and Salesforce Knowledge article feeds for your zone. This page is also used to determine the community from which email notifications are sent to users.</p> <p>This page is automatically generated when you save a new zone without choosing <i>Visualforce Page That Hosts Your Community's Feeds</i>. 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, <i>ZoneName_main</i>. The page also includes a language attribute that matches your organization's default language.</p>

 **Note:** For more information on Visualforce, see the [Visualforce Developer's Guide](#).

IN THIS SECTION:

[Customizing Chatter Answers using Visualforce Pages](#)


You can create a Visualforce page that displays a Chatter Answers zone customized for your users.

[Adding a Custom Visualforce Page to Display Chatter Answers](#)

Use a Visualforce page to provide a custom Chatter Answers experience for your customers.


Customizing Chatter Answers using Visualforce Pages

You can create a Visualforce page that displays a Chatter Answers zone customized for your users.

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

By using a Visualforce page, you can add custom widgets to Chatter Answers, such as announcements or ads, which let you extend your branding and change the experience for users.

You can also control the arrangement of elements on the page. Your customers can access your custom Chatter Answers zone through a Force.com site, a tab in a Community, or a Customer Portal to which you've added the Visualforce page. When internal users access a Chatter Answers zone that uses a Visualforce page, they see only the zone that is related to the page; they can't switch zones as they can when using the standard Q&A tab.

 **Note:** You can't customize the Chatter Answers Q&A tab with a Visualforce page, but you can add a Visualforce tab in your organization and create an internal Chatter Answers experience with your custom Visualforce page.

In order to display the zone, the Visualforce page you create 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`.

Example: Custom Visualforce Page using the `chatteranswers:allfeeds` Component

The `chatteranswers:allfeeds` component provides an out-of-the-box Chatter Answers Visualforce page. A page that uses the `chatteranswers:allfeeds` component includes the following Chatter Answers elements:

- Chatter Answers sign in
- Chatter Answers profile
- Data category filters
- The Search/Ask bar
- Feed filters
- The questions feed

For example, the following Visualforce page including the `chatteranswers:allfeeds` component has all of the Chatter Answers elements in the standard arrangement for a zone without any other custom widgets.

```
<apex:page>
  <body>
    <chatteranswers:allfeeds communityId="09aD00000000K7c"/>
  </body>
</apex:page>
```

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

Example: Custom Visualforce Page using All of the Chatter Answers Page Components

Using the Chatter Answers page components allows you to pick and choose which elements of your Chatter Answers zone appear to your customers. You can use as few as one component or you can customize your page to use all of them. You can include the following components:


- `chatteranswers:aboutme`
- `chatteranswers:guestsignin`
- `chatteranswers:feedfilter`
- `chatteranswers:feeds`
- `chatteranswers:searchask`
- `chatteranswers:datacategoryfilter`

Using the Chatter Answers page components instead of the `chatteranswers:allfeeds` component allows you more flexibility over the arrangement of the elements on the page. For example, the following Visualforce page includes all of the standard Chatter Answers elements, but they appear in a different order on the resulting page than they do when you use the `chatteranswers:allfeeds` component. In this example, the Search/Ask component and the feed filter appear below the feed instead of above it.

```
<apex:page language="en_US" showHeader="false" cache="true">
  <body>
    <div class="csMini">
      <div class="threecolumn">
        <div class="leftContent">
          <chatteranswers:guestsignin />
          <chatteranswers:aboutme communityId="09aD00000000cfE"/>
          <chatteranswers:datacategoryfilter communityId="09aD00000000cfE"/>
        </div>
        <div class="mainContent">
          <div class="lowerMainContent" id="lowerMainContent">
            <div id="rightContent" class="rightContent"></div>
            <div id="centerContent" class="centerContent">
              <chatteranswers:feeds communityId="09aD00000000cfE"/>
              <chatteranswers:searchask communityId="09aD00000000cfE"/>
              <chatteranswers:feedfilter />
            </div>
          </div>
        </div>
        <div class="clearingBox"></div>
      </div>
    </div>
  </body>
</apex:page>
```


Adding a Custom Visualforce Page to Display Chatter Answers

Use a Visualforce page to provide a custom Chatter Answers experience for your customers.

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

You must have a Visualforce page created that includes either the `chatteranswers:allfeeds` component or a combination of the following components: `chatteranswers:aboutme`, `chatteranswers:guestsignin`, `chatteranswers:feedfilter`, `chatteranswers:feeds`, `chatteranswers:searchask`, `chatteranswers:categoryfilter`.

To add a custom Visualforce page for displaying Chatter Answers:

1. From Setup, enter `tabs` in the `Quick Find` box, then select **Tabs** to display a list of your organization's Visualforce tabs.
2. In the Visualforce section, click `New` to create a new Visualforce tab.
3. Select the Visualforce page you want to use and add details for the other fields on the page.
4. Click `Next`.
5. Select which user profiles can see the tab.
6. Select the custom apps from which the tab will be available.
7. Click `Save`.

To add the Visualforce tab as a Community tab, make sure the page is available in the community's tabs.

To add the Visualforce tab to a Customer Portal, make sure the Visualforce tab is configured to show in the portal.

You don't need to add the Visualforce tab to a Force.com site. Just make sure that you have created the Visualforce page with Chatter Answers components before you set up the site.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise**, **Developer**, **Performance**, and **Unlimited** Editions.

USER PERMISSIONS


To create a Visualforce page:

- "Customize Application"

To add a Visualforce tab:

- "Customize Application"

Configuring a Force.com Site for Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

 **Note:** Configuring a Force.com site is recommended for self-service communities.

Configure a Force.com site for Chatter Answers to host a domain and publicly display some of your Salesforce data, such as questions, replies, and Salesforce Knowledge articles.

1. From Setup, enter `Sites` in the `Quick Find` box, then select **Sites**.
2. Click **Edit** next to the name of the site you want to configure for Chatter Answers.
3. Click **Active** to activate the site.
You can activate the site after you've finished [setting up Chatter Answers](#).
4. In `Active Site Home Page`, choose a Visualforce page as the home page for your site.
5. Click **Save**.
6. Click **Edit** on the Site Visualforce Pages related list.
 - a. Use the **Add** and **Remove** buttons to enable the following Visualforce pages for your site:
 - `ChatterAnswersAgentView`
 - `ChatterAnswersChangePassword`
 - `ChatterAnswersForgotPassword`
 - `ChatterAnswersForgotPasswordConfirm`
 - `ChatterAnswersHelp`
 - `ChatterAnswersLogin`
 - `ChatterAnswersRegistration`
 - b. Click **Save**.
7. Click **Public Access Settings** to grant guest users (unauthenticated, non-Customer Portal users) access to cases, questions, and Salesforce Knowledge articles.
 - a. Click **Edit** on the profile for Chatter Answers users.
 - b. In Standard Object Permissions, click **Read** on Cases and Questions.
 - c. Optionally, if you want articles to display in Chatter Answers, click **Read** on articles types in Article Type Permissions.
 - d. Click **Save**.
8. Click **Edit** next to a category group in the Category Group Visibility Settings related list to grant users access to the categories so that they can browse questions, replies, and Salesforce Knowledge articles.
 - a. Next to `Visibility`, click `All Categories`.
 - b. Click **Save**.

EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.

USER PERMISSIONS

To create and edit Force.com sites:

- "Customize Application"

9. Return to the site and select its name from Setup by entering *Sites* in the *Quick Find* box, then selecting **Sites**.
10. Click **Login Settings** to enable user authentication for the site.
 - a. Click **Edit**.
 - b. In *Enable Login For*, choose the Customer Portal you created for Chatter Answers.
 - c. Click **Save**.

After you configure your Force.com site for Chatter Answers, you can replace the default Visualforce pages that make up your community with customized ones. The Visualforce pages are automatically set to your site's URL so that portal users can navigate to them.



Note: To make your site's page URLs short and easy to remember, you can use the Chatter Answers URL rewriter. The following pages use the URL rewriter:

- ChatterAnswersHelp
- ChatterAnswersLogin
- ChatterAnswersRegistration
- ChatterAnswersForgotPassword

Chatter Answers is also compatible with custom URL rewriters for sites.


1. From Setup, enter *Sites Settings* in the *Quick Find* box, then select **Sites Settings**.
2. Click **Edit** next to a site.
3. Choose the pages to replace. If you replace the *Change Password Page*, the *Change Password Page* for your site is automatically updated too.
4. Click **Save**.



Note: Internet Explorer 8 users receive a security warning if you customize with URLs that don't include https://.

MANAGING CHATTER ANSWERS

After you've set up and customized Chatter Answers, there are several administration tasks that you can do.

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Get reports on Chatter Answers use and configure Chatter Answers for user reputations.

IN THIS SECTION:

[Reporting on Chatter Answers](#)

[Managing Chatter Answers User Reputations](#)

Reporting on Chatter Answers

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

You can use custom report types to define report criteria from which users can run and create reports on questions and replies posted to your Chatter Answers zone. Users with the "Create and Customize Reports" permission can click **Create New Custom Report** on the Reports tab to run a report based on any custom report types.

To create custom report types for Chatter Answers:

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

2. From the All Custom Report Types page, you can:

- Define a new custom report type by clicking **New Custom Report Type**.

You can't select replies as a primary object.

- Update a custom report type's name, description, report type category, and deployment status by clicking **Edit** next to a custom report type's name.

- Delete a custom report type by clicking **Del** next to the custom report type's name. All the data stored in the custom report type will be deleted and cannot be restored from the Recycle Bin.

- Display detailed information about a custom report type and customize it further by clicking a custom report type's name.

EDITIONS

Available in: Salesforce Classic

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EDITIONS

Available in: Salesforce Classic

Chatter Answers is available in: **Enterprise, Developer, Performance, and Unlimited** Editions.


USER PERMISSIONS

To create or update custom report types:


- "Manage Custom Report Types"

To delete custom report types:

- "Modify All Data"

 **Note:** For information on reports and custom report types, see [Set Up a Custom Report Type](#).

Managing Chatter Answers User Reputations

 **Note:** Chatter Answers is scheduled for retirement in all Salesforce orgs as of Winter '18 release. For more information, see [Chatter Answers to Retire in Winter '18](#). Starting with Summer '16, Chatter Answers isn't available in new orgs. Instead, you can use Chatter Questions, a Q&A feature that's seamlessly integrated into Chatter. With Chatter Questions, users can ask questions and find answers without ever needing to leave Chatter. Existing orgs will continue to have access to Chatter Answers if it was enabled before the Summer '16 release from now until Winter '18.

Tap into the expertise and knowledge of your most active community members by rewarding their activity. By enabling reputations, you let users earn points and ratings that display in hover details over a user's photo in the feed. As your star posters engage more frequently, they improve the overall content in your community and provide better answers for users who are searching for help with an issue. This means that users who are searching for a solution can be confident that an answer from an expert can be trusted, which means fewer support calls for your organization.

Users earn points when their posts receive votes or are selected as having resolved the question in any of the zones to which they belong. When they earn enough points, the hover details show their reputation as well as the number of posts and questions they've resolved in that zone. 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.

Chatter Answers comes with the following pre-defined reputation levels that apply to all zones:

Name	Points per Level	Color
Newbie	0 – 499	Green
Smartie	500 – 1999	Blue
Pro	2000 – 4999	Purple
All Star	5000+	Orange

To add or edit reputation level names or points per level in any of your zones, use the ChatterAnswersReputationLevel object in the API. You can create up to 25 different reputation levels for each zone. Colors for the different reputation levels can be changed at the style sheet (CSS) level.

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

Activity	Points Earned
Creates the answer that resolves a question	25
Selects the answer that resolves a question	10
Receives an upvote on their answer	5
Receives a downvote on their answer	-1

EDITIONS

Available in: **Salesforce Classic**

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