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# Salesforce Communities Recognition Badges Implementation Guide

Salesforce, Winter '19





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# RECOGNITION BADGES

Acknowledge your members' accomplishments or celebrate with them using Recognition Badges.

Available in: **Enterprise, Professional, Unlimited,** and **Developer** editions.

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We provided some default badges but you can create your own. You can also choose who else can create badges and who can give badges in your community.

## [Recognition Badges Considerations](#)

While Recognition Badges are a great way to keep your members involved in your community, keep a few things in mind when you use them.

## [Recognition Badges Setup](#)

With just a few steps, you can set up Recognition Badges for your community and restrict who can create and give badges.

## [Turn On Recognition Badges in Community Workspaces](#)

Turn on Recognition Badges via the Gamification Tile to finish setting up and start giving badges.

## [Create, Edit, and Delete Recognition Badges](#)

In addition to the four default badges, you can create your own to fit the needs of your community. You can edit both the default badges and your custom badges.

## [Manage Who Can Give a Specific Recognition Badge](#)

Controlling who can give a recognition badge helps make sure that the right badges are awarded to the right members. For example, you can set it up so that only community managers can award MVP and VIP badges.

## [Give Recognition Badges to Community Members](#)

Giving badges to members helps reward them for staying engaged in the community.

## [Delete Assigned Badges](#)

Sometimes badges are assigned to a member by mistake. If you gave the badge, you can delete it from the member's profile page.

## [Use the API to Give Recognition Badges Sample Code](#)

You can use the API to programmatically give recognition badges to community members.

## Recognition Badges Considerations

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While Recognition Badges are a great way to keep your members involved in your community, keep a few things in mind when you use them.

- Chatter must be enabled for your community.
- Community members with the following user licenses can see the badges that they have received, but not give badges:
  - Customer Portal User
  - High Volume Customer Portal
  - Internal Portal User

### EDITIONS

Available in: **Enterprise, Professional, Unlimited,** and **Developer** editions.

- Standard Partner
- Badges aren't translated. The badge name and description are the same regardless of which language the member is using.
- "Review" moderation rules are not enforced for badges comments. To help prevent blacklisted keywords from appearing in your community, add your list of words to "block" or "replace" rules.

## Recognition Badges Setup

With just a few steps, you can set up Recognition Badges for your community and restrict who can create and give badges.

### [Enable Work.com Thanks](#)

Recognition Badges are based on the Work.com Thanks feature. Enable this feature plus the ability to restrict who can create badges before continuing in your setup.

### [Configure Who Can Create Recognition Badges](#)

Use permission sets, our recommended method, to choose which members can create recognition badges. Restricting who can do so helps control the number of badges in your community and maintains the value of a badge.

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### [Use Components to Display Recognition Badges on Member Profiles](#)

Use the User Profile component or the Recognition Badge component to display Recognition Badges on a member's profile.

### [Display the Full List of Recognition Badges on a Member's Profile Page](#)


Edit the user profile layout to display the full list of recognition badges on a members' profile page.

### EDITIONS

Available in: **Enterprise**, **Professional, Unlimited**, and **Developer** editions.

## Enable Work.com Thanks

Recognition Badges are based on the Work.com Thanks feature. Enable this feature plus the ability to restrict who can create badges before continuing in your setup.

 **Note:** You don't need an additional work.com license to set up the Thanks feature.

1. In Classic, from Setup, enter *work.com* in the **Quick Find** box.
2. Select **Work.com Settings**.
3. Under **Thanks Setting**, select **Enable** and save. The Restrict Custom Badge Creators option is now available.
4. Under Restrict Custom Badge Creators, select **Enable**, and save.

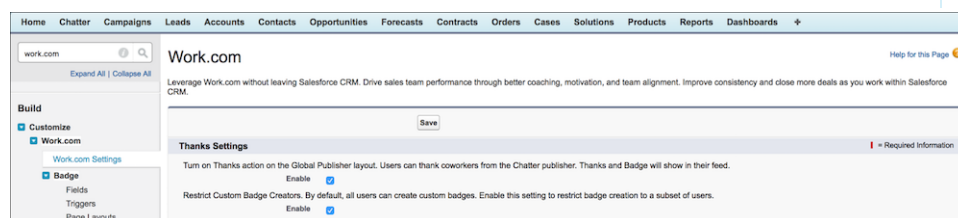
### EDITIONS

Available in: **Enterprise**, **Professional, Unlimited**, and **Developer** editions.

### USER PERMISSIONS

To set up the Thanks feature:

- Customize Application



## Configure Who Can Create Recognition Badges

Use permission sets, our recommended method, to choose which members can create recognition badges. Restricting who can do so helps control the number of badges in your community and maintains the value of a badge.

Say that you create a recognition badge to be given to MVPs. Restricting who can create badges helps eliminate the risk of having multiple MVP badges. Restricting who can give the badge to, say, community managers helps make sure only those members who are truly MVPs receive recognition for it.

1. First, set up the permission set for creating badges. From Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information. Name the permission set "Create Custom Badge Definitions."
4. Click **System Permissions** and then click **Edit**.
5. To add the permissions for creating a badge, select **Create custom Badge Definitions** permission.
6. Select **Manage Assignments** and add those users you want to let create badges.

### EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

### USER PERMISSIONS

To create permission sets:


- "Manage Profiles and Permission Sets"

To assign permission sets:

- "Assign Permission Sets"

## Configure Who Can Give Recognition Badges

Use permission sets, our recommended method, to choose which members can give recognition badges. Restricting who can do so helps control the number of badges in your community and maintains the value of a badge.

 **Note:** Buttons for giving badges appear in two places on the member's profile. If, after following the steps below, your approved users don't see the Give button at the top of a member's profile, under Settings, go to Users. Edit the User Page Layout and add the Give Badge action in the Salesforce Mobile and Lightning Experience Actions section.

1. First, set up the permission set for giving badges. From Setup, enter *Permission Sets* in the **Quick Find** box, then select **Permission Sets**.
2. Click **New**.
3. Enter your permission set information. Name the permission set "Give Recognition Badges in Lightning Communities."
4. Click **System Permissions** and then click **Edit**.
5. To add the permissions for giving a badge, select **Give Recognition Badges in Lightning Communities** permission.
6. Select **Manage Assignments** and add those users you want to let give badges.

### EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

### USER PERMISSIONS

To create permission sets:

- "Manage Profiles and Permission Sets"

To assign permission sets:

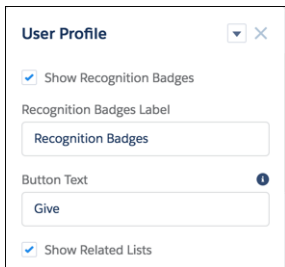
- "Assign Permission Sets"

# Use Components to Display Recognition Badges on Member Profiles

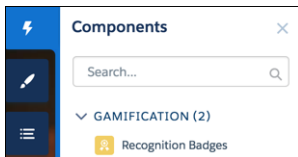
Use the User Profile component or the Recognition Badge component to display Recognition Badges on a member’s profile.

You can either use the User Profile component or the Recognition Badges component to allow assigned badges to display on a member’s profile page.

1. In the User Profile component, select **Show Recognition Badges**.



2. Alternatively, drag the Recognition Badges component onto the profile page.



## EDITIONS

Available in: **Enterprise, Professional, Unlimited,** and **Developer** editions.

## USER PERMISSIONS

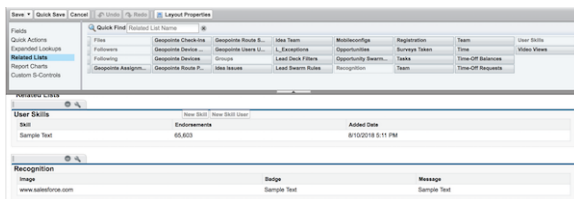
To manage page components:

- Create And Set Up Communities

# Display the Full List of Recognition Badges on a Member’s Profile Page

Edit the user profile layout to display the full list of recognition badges on a members’ profile page.

1. From Setup, go to **Users** under **Customize**. Select **Page Layouts**.
2. Click **Edit** next to User Profile Layout.
3. Click **Related Lists** and drag **Recognition** to the Related Lists section of the page layout and save.



## EDITIONS

Available in: **Enterprise, Professional, Unlimited,** and **Developer** editions.

## USER PERMISSIONS

To update the user profile layout:

- Customize Application

4. Each community’s guest users have a discrete user profile. To find out which user profile layout to update, go to Community Builder, of the community you’re working on, open Settings, and then click the link to the guest user profile. Repeat steps 1–3 for that user profile layout.



## Turn On Recognition Badges in Community Workspaces

Turn on Recognition Badges via the Gamification Tile to finish setting up and start giving badges.

Before you can complete this task, you enable Work.com's Thanks feature, configure permission sets for who can create and give badges, and add recognition to user profile layouts.

1. In Community Workspaces, click the Gamification tile.
2. In **Settings**, turn on Recognition Badges. A Recognition Badges section appears above **Settings**.
3. To see the available badges and create and manage badges, click **Recognition Badges**.

BADGE NAME	DESCRIPTION	ACTIVE	CREATED BY	CREATED DATE	LAST MODIFIED DATE
Welcome	Welcome! We're glad you're here.	<input checked="" type="checkbox"/>	Michael Manager	3/23/2016, 9:43 AM	3/23/2016, 9:43 AM
Congratulations	Wonderful news!	<input checked="" type="checkbox"/>	Michael Manager	3/23/2016, 9:43 AM	3/23/2016, 9:43 AM
Nice Work	Kudos for a job well done.	<input checked="" type="checkbox"/>	Michael Manager	3/23/2016, 9:43 AM	3/23/2016, 9:43 AM
Thanks	Thank you for being awesome.	<input checked="" type="checkbox"/>	Michael Manager	3/23/2016, 9:43 AM	3/23/2016, 9:43 AM

### EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

### USER PERMISSIONS

To turn on or off Recognition Badges:

- Create and Set Up Communities
- AND
- Moderate Chatter

## Create, Edit, and Delete Recognition Badges

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In addition to the four default badges, you can create your own to fit the needs of your community. You can edit both the default badges and your custom badges.

1. To create a badge, in Community Workspaces, click the Gamification tile and go to the Recognition Badges section.
2. Click **New**.
3. Give your badge a name and a description and upload an image. Click **Save**. The **Public** and **Active** checkboxes are selected by default. When you save, your badge is immediately available to everyone with permissions to give a badge. If you want to limit who can give a badge, deselect **Public**. If you aren't ready for it to be live, deselect **Active**.

### EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

### USER PERMISSIONS

To create recognition badges:

- Create Custom Badge Definitions

To manage your recognition badges:

- Create And Set Up Communities  
AND  
Moderate Chatter  
OR  
Manage Communities  
AND  
Moderate Chatter

To manage badges created by someone else:

- Modify All Data  
AND  
Moderate Chatter

- To edit the fields, go to the badge related list, click the dropdown and the end of the badge's row, and click **Edit**.

CREATED BY	CREATED DATE ↓	LAST MODIFIED DATE	
Eric Ware	8/8/2018 1:48 PM	8/8/2018 4:34 PM	⌵
Eric Ware	8/8/2018 1:48 PM	8/8/2018 1:	<ul style="list-style-type: none"> <li>Edit</li> <li>Delete</li> <li>Manage Badge Givers</li> </ul>

- To delete a badge, go to the badge related list, click the dropdown and the end of the badge's row, and click **Delete**.

## Manage Who Can Give a Specific Recognition Badge

Controlling who can give a recognition badge helps make sure that the right badges are awarded to the right members. For example, you can set it up so that only community managers can award MVP and VIP badges.

By default, recognition badges are available to everyone with permission to give badges. To be able to select specific givers, make sure to deselect **Public** when you create or edit the badge.

1. In Community Workspaces, click the Gamification tile.
2. Click the dropdown and the end of the badge's row, and click **Manage Badge Givers**.
3. In the popup window, search to add the users or public groups you want to have permission to give badges. Only those users with the Give Recognition Badges in Lightning Communities permission are available. You can remove members from the list by clicking the X by their name. Click **Save**.

### EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

### USER PERMISSIONS

To create recognition badges:

- Create Custom Badge Definitions

To manage your recognition badges:

- Create And Set Up Communities
- AND
- Moderate Chatter
- OR
- Manage Communities
- AND
- Moderate Chatter

To manage badges created by someone else:

- Modify All Data
- AND
- Moderate Chatter

## Give Recognition Badges to Community Members

Giving badges to members helps reward them for staying engaged in the community.

1. Open the member's profile page.
2. Click either the **Give Badge** button at the top of the profile or the **Give** button on the Recognition Badges card.
3. Choose which badge you want to give by clicking **Change badge**.
4. Add a message letting the member know why they are getting the badge, and click **Give**.

### EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.


### USER PERMISSIONS


To give recognition badges:

- Give Recognition Badges in Lightning Communities

### Give a Badge


\* To

 André Burki

 **Thanks**  
Thank you for being awesome. [Change badge](#)

\* Message

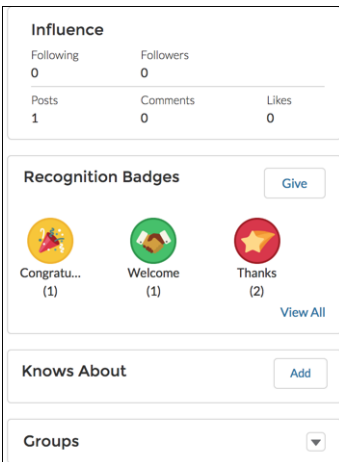
Thank you for all you do for our members!

 [Give](#)

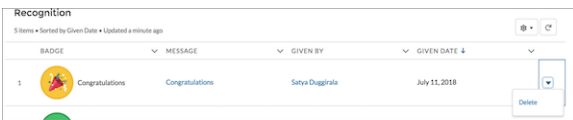
## Delete Assigned Badges

Sometimes badges are assigned to a member by mistake. If you gave the badge, you can delete it from the member's profile page.

1. Open the profile page for the member who got the badge by mistake.
2. To open the Recognition Badge list view, click **View All** under Recognition.



3. Locate the badge in the list and click the dropdown at the end of the row.
4. Click **Delete**.



### EDITIONS

Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

### USER PERMISSIONS

To manage your recognition badges:

- Create And Set Up Communities
- AND
- Moderate Chatter
- OR
- Manage Communities
- AND
- Moderate Chatter

## Use the API to Give Recognition Badges Sample Code

You can use the API to programmatically give recognition badges to community members.

### Assign a Recognition Badge and Notify a Member Using Apex

```
ID networkID = '0DBB0000000CdBaOAK';
ID badgeDefintionID = '0W1B0000000ekuJKAQ';
ID giverID = '005B0000003InDeIAK';
ID recipientID = '005B000000483dDIAQ';
String message = 'Welcome to the community';

WorkThanks thanks = new WorkThanks (
NetworkdID=networkID
GiverID=giverID,
Message=message
```

```

);
insert thanks;

WorkBadge badge = new WorkBadge(
  DefinitionId=badgeDefinitionId,
  NetworkID=networkID
  RecipientId=recipientID,
  SourceId=thanks.id
);
insert badge;

// optional: create a Chatter post on the user profile
// showing the badge. The user will be notified through
// the standard Chatter notification mechanisms.
FeedItem feedItem = new FeedItem(
  NetworkScope=networkID,
  ParentId=recipientID,
  RelatedRecordId=thanks.id,
  Body=message,
  Type='RypplePost',
  Visibility='AllUsers'
);
insert feedItem;

// Unfortunately, there is a limitation in the work.com API that
// prevents these 2 lines from working:
// thanks.FeedItemId = :feedItem.id;
// update thanks;

```

## Assign a Recognition Badge When a Member Reaches a Number of Reputation Points

To avoid assigning the same badge twice, we've added a custom "hasBadge\_c" field on the user object.

```

trigger NetworkMemberTrigger on NetworkMember (after update) {
  for (NetworkMember nm : Trigger.New) {
    User user = [select ID, hasBadge_c from User where ID =
:nm. MemberID];
    If (nm.ReputationPoints >= 40 && !user.hasBadge_c) {
      WorkThanks thanks = new WorkThanks(
        GiverId='005B00000036ukY',
        Message='inserted by trigger',
        NetworkId=nm.NetworkId);
      insert thanks;

      WorkBadge badge = new WorkBadge(
        DefinitionId='0W1B0000000T1QBKA0',
        NetworkId=nm.NetworkId,
        RecipientId=nm.MemberId,
        SourceId=thanks.id);
      insert badge;

      user.hasBadge_c = true;
    }
  }
}

```

```

        update user;
    }
}

```

## Automatically Add Reputation Points When Badge Is Assigned to a Member

To avoid hardcoding the number of reputation points that are assigned with the badge, this example assumes that the `WorkBadgeDefinition` entity has been customized with an additional "ReputationPoints\_\_c" field.

```

trigger WorkBadgeTrigger on WorkBadge (after insert) {
    for (WorkBadge badge : Trigger.new) {
        if (badge.DefinitionId == '0W1B0000000T1QBKA0') {
            WorkBadgeDefinition badgeDefinition = [select Id,
ReputationPoints_c from WorkBadgeDefinition where Id =
:badge.DefinitionId];
            NetworkMember member = [select Id, ReputationPoints from
NetworkMember where MemberID = :badge.RecipientId];
            member.ReputationPoints = member.ReputationPoints +
badgeDefinition.ReputationPoints_c;
            update member;
        }
    }
}

```

## Assign Recognition Badge When Member Creates Number of Posts or Comments

The `ChatterActivity` object contains the following useful fields:

- `CommentCount`
- `CommentRecievedCount`
- `LikeReceivedCount`
- `PostCount`

These counters can be used to programmatically assign badges based on various thresholds. For example, members could get a badge whenever they create 100 posts or whenever they received 100 likes.

```

trigger ChatterActivityTrigger on ChatterActivity (after update) {
    for (ChatterActivity ca : Trigger.New) {
        if (ca.PostCount >= 10) {
            // TODO: assign badge to user if he hasn't received one already
        }
    }
}

```