



# USING IDEAS

## Understand and Work with Ideas

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

 **Tip:** Salesforce offers its own Ideas community for Salesforce users to submit product feedback and suggest new features. To visit, go to <http://ideas.salesforce.com>.

## Ideas Terminology

The following terminology is used for Ideas:

### Category, Ideas

Categories are administrator-defined values that help organize ideas into logical sub-groups within a zone. The View Category drop-down list on the Ideas tab allows users to filter ideas by category, and the `Categories` picklist on the Post Ideas page lets users add categories to their ideas. For example, if your ideas zone has the focus “Improvements to our clothing line,” then you might set up categories such as “Shirts,” “Jackets,” and “Slacks.” Each organization has one common set of categories that can be added or removed from each zone. An administrator defines separate categories for their ideas and answers zones.

### Comment

Comments are plain text responses to posted ideas that enable discussions about the ideas. On the Ideas tab, the Comments subtab lists the comments that have most recently been submitted. On the detail page of an idea, comments are sorted in chronological order from oldest to newest.

### Community

Communities are customizable public or private spaces for employees, end-customers, and partners to collaborate on best practices and business processes.

### Community Expert

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

### Demote

If you dislike an idea, you can click **demote** to subtract 10 points from its overall score and decrease the idea's overall popularity ranking. You cannot demote the same idea more than once, and after you demote an idea you cannot promote it. An idea can have negative overall points if more users demote the idea than promote it.

### Half-life

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

### Idea

Ideas are suggestions posted by the members of an ideas community and are organized by zones. For example, if the focus of a particular zone is “Ideas for car features,” an appropriate idea for that zone might have the title “Insulated cup holders that keep your

beverage hot or cold.” Or, if the focus of a particular zone is “Ideas for our company’s employee benefits,” an appropriate idea for that zone might have the title “On-site day care.”

### Idea Themes

Idea Themes provide a forum in which you invite community members to post ideas about specific topics so that community members can solve problems or propose innovations for your company.

### Point

A point is a unit of measurement that represents the popularity of an idea. Each vote for an idea is worth ten points (promote adds 10 points and demote removes 10 points). An idea’s total number of points displays to the left of the idea.

### Popular Ideas

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea’s positive votes. Regardless of an idea’s static total number of points, ideas with newer positive votes display higher on the page than ideas with older positive votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were positively voted on in the past.

### Promote

If you agree with or like an idea, click **promote** to add 10 points to the idea. You cannot promote the same idea more than once and you cannot promote an idea that you have already demoted. Salesforce automatically adds your promote vote to any idea you post.

### Recent Activity

Your Recent Activity page contains a summary of all the recent activity that relates to your participation within a zone. For example, this page lists all the ideas and comments you have posted to a zone as well as the ideas you have voted on. You can view your Recent Activity page by clicking your nickname located on the right side of the Ideas tab.

### Status

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

### Top All Time Ideas

On the Top All-Time subtab, ideas are sorted from most number of points to fewest. This subtab allows you to see the most popular ideas in the history of your Ideas zone.

### Vote, Idea

In an ideas community, a vote means that you have either promoted or demoted an idea. After you vote on an idea, your nickname displays at the bottom of the idea’s detail page to track that your vote was made. You can use your Recent Activity page to see a list of all the ideas you have voted on.

### Zone

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

## Get Started Using Ideas

## Posting and Editing Ideas

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### Posting Ideas

1. Use the search box in the sidebar to search for existing ideas that match your idea. This helps reduce the number of duplicate ideas in the community. If no existing ideas match your idea, proceed to the next step.

2. Create a new idea using one of the following options:

- On the Ideas tab, select the appropriate community from the Community list at the top of the page and click **Post Idea**.
- From the Ideas list view, click **New Idea**, then select a community, and click **Continue**.
- From the sidebar, select **Idea** from the *Create New* drop-down list, select a community, and click **Continue**.

3. If you're posting the idea to an [idea theme](#), select one from the list. You can only post ideas to idea themes that exist within your community.

4. Enter a title for your idea no longer than 255 characters.

After you enter the title, Salesforce searches the community for ideas with the same words in their title or description and then displays the top five matching ideas. If one of these ideas looks similar to your own, click that idea's title to open its detail page in a new window. From the detail page, you can read a description of the idea and vote for it instead of posting your duplicate idea to the community. If none of the ideas in the list are similar to your idea, proceed with the following steps to post your unique idea.

5. In the description area, enter the details of your idea.

If your organization has enabled the HTML editor for Ideas, the description can include HTML and reference online images. If the HTML editor is not enabled, use plain text only. .

6. Choose one or more categories for your idea.

7. If you are an administrator, optionally choose a status for your idea. The *Status* drop-down list is only visible to administrators.

8. If enabled by your administrator, you can add an attachment to your idea:

- Click **Browse** to locate and attach a file from your computer.

You can attach any supported file types, including Microsoft® PowerPoint® presentations and Excel® spreadsheets, Adobe® PDF files, image files, audio files, and video files. The maximum attachment size is determined by your organization.

- Optionally, type a title for the file. If you don't enter a title, the filename appears as the attachment's title.

9. Click **Post**.

Your new idea displays at the top of the Recent Ideas subtab, and your vote (promote) is automatically applied to the idea. Each vote is always worth 10 points.

 **Tip:** Use the following writing tips to make your idea easier for others to read and understand:

- Use complete sentences.
- Be as concise and direct as possible.
- Check your spelling and punctuation.

## Editing Ideas

If you have the "edit" permission on ideas, you can edit the details of an existing idea:

1. On the Ideas tab, click the title of an idea.

2. Click **Edit**.

3. Modify the title, description, category, and status (administrators only) of the idea as appropriate.

4. Click **Apply** to save your work.

Editing an idea's details does not allow you to edit the [comments on an idea](#).

## Viewing Ideas

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The following sections describe how to view ideas:

- [Accessing the Ideas Tab in Salesforce](#)
- [Accessing the Ideas Tab in a Portal](#)
- [Browsing Popular Ideas](#)
- [Browsing Recent Ideas](#)
- [Browsing Top Ideas of All Time](#)
- [Viewing Ideas by Category](#)
- [Viewing Ideas by Status](#)
- [Browsing Ideas in Other Zones](#)
- [Viewing the Details of an Idea](#)

### Accessing the Ideas Tab in Salesforce

In Salesforce, the Ideas tab is available by default in the Community app. You can select this app from the Lightning Platform app menu in the top right corner of any Salesforce page.

Note that your administrator may have customized your profile to also display the Ideas tab in other apps. Also, your administrator may have renamed the Ideas tab to an alternate tab name.

Click  **Tab** to display the Ideas tab. Click  **List** to toggle back to the list view.

 **Tip:** The Zone list at the top of the Ideas tab lists all the available zones, and each zone contains its own unique group of ideas.

### Accessing the Ideas Tab in a Salesforce.com Community

If your organization has created a Salesforce.com Community, your administrator can display the Ideas tab to the community by adding it to the list of selected tabs during setup of the community.

### Accessing the Ideas Tab in a Portal

If your organization has portal users who have access to a Customer Portal or partner portal, your portal's administrator can display the Ideas tab on either type of portal. The ideas that display in a portal are either created through a portal or are created internally in Salesforce and published for display in a portal.

### Browsing Popular Ideas

On the Popular Ideas subtab, ideas are sorted by an internal calculation that reflects the age of an idea's positive votes. Regardless of an idea's static total number of points, ideas with newer positive votes display higher on the page than ideas with older positive votes. This allows you to browse ideas that have most recently gained popularity, with less precedence given to long-established ideas that were positively voted on in the past.

### Browsing Recent Ideas

The Recent Ideas subtab lists the ideas that have most recently been submitted. Newer ideas display above older ideas.

## Browsing Top Ideas of All Time

The Top All-Time subtab lists the ideas with the most points. The difference between the Top All-Time subtab and the Popular Ideas subtab is that the Top All-Time subtab displays the top ideas of all time by number of points, whereas the Popular Ideas subtab uses an algorithm to display the ideas that have received the most recent positive votes.

## Viewing Ideas by Category

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

To browse ideas by category, select a category from the `View Category` drop-down list. Alternatively, click the category link at the bottom of the idea description, next to the user who posted the idea.

## Viewing Ideas by Idea Themes

You can view all of the ideas that are posted to an idea theme. From the detail page, you can manage an idea theme and its related ideas.

## Viewing Ideas by Status

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

To view all ideas of a particular status, go to the Ideas tab and select a value from the `Status` drop-down list. Alternatively, click the status link next to an idea to view all ideas in the zone with that status.

## Browsing Ideas in Other Zones

Administrators can create multiple zones with each zone having its own unique list of ideas. For this reason, it is important to verify you are viewing the correct zone when browsing ideas. To browse ideas in a specific zone, select a zone from the list of zones the top of the page.

## Viewing the Details of an Idea

Click the title of an idea to open the detail page of that idea. The detail page of an idea includes the following sections:

- The details of the idea, including its full text and number of points
- The related idea theme and the zone to which it belongs.
- All [comments](#) that have been submitted for the idea
- An area for adding a new comment
- A list of the last 100 users who have voted (promoted or demoted) for the idea, sorted left to right from most recent vote to oldest vote
- If you are an administrator, the detail page lets you edit, delete, and merge ideas.

## Voting on Ideas

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In an ideas community, a vote means you have either promoted or demoted an idea. If you agree with or like an idea, click **promote** to add 10 points to the idea. You cannot promote the same idea more than once and you cannot promote an idea that you have already demoted. Salesforce automatically adds your promote vote to any idea you post.

If you dislike an idea, you can click **demote** to subtract 10 points from its overall score and decrease the idea's overall popularity ranking. You cannot demote the same idea more than once, and after you demote an idea you cannot promote it. An idea can have negative overall points if more users demote the idea than promote it.

To vote on an idea:

1. On the Ideas tab, locate an idea you want to promote or demote.
2. To add 10 points to the idea, click **promote** next to the idea. To subtract 10 points from the idea, click **demote**. After you have voted, your Nickname displays at the bottom of the idea's detail page to track that your vote was made.

 **Note:** When you [post a new idea](#), you automatically cast a vote for that idea and 10 points are added to the idea's score.

## Commenting on Ideas

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Comments are plain text responses to posted ideas that enable discussions about the ideas. On the Ideas tab, the Comments subtab lists the comments that have most recently been submitted. On the detail page of an idea, comments are sorted in chronological order from oldest to newest.

## Adding Comments to Ideas

Add comments to ideas to share your thoughts and opinions with other community members:

1. On the Ideas tab, locate an idea on which you want to add a comment.
2. Click either the title of the idea or the **Comments** link below the idea description.
3. On the detail page for the idea, type your comments into the text entry area in the Add Your Comment section. You can enter up to 4,000 characters.

If your organization has enabled the HTML editor for Ideas, the description can include HTML and reference online images. If the HTML editor is not enabled, use plain text only. .

4. Click **Post** to submit your comment.

Your newly added comment displays in the Comments related list on the idea detail page.

## Editing Comments on Ideas

To edit a comment that you have submitted on an idea:

1. On the detail page of the idea, click **Edit** next to your comment.
2. Modify your comment as desired.
3. Click **Apply** to save your work.

## Deleting Comments on Ideas

Deleting comments on ideas requires the “Delete” permission on ideas.

1. On the detail page of the idea, click **Del** next to your comment.
2. Click **OK**.

## Viewing Recently Posted Comments

To view the comments that have most recently been posted in your Ideas community, click the Comments subtab and select a zone in which to view comments. Click the text of a comment to view the detail page of the appropriate idea.

On the Comments subtab:

- Comments are listed in chronological order from newest to oldest.
- The title of the idea on which the comment was posted displays above the comment.
- The alias of the user who posted the comment displays next to the comment text.
- The total number of comments on the idea displays in brackets below the comment text. For example, `Comments [20]` indicates that the idea has twenty comments.

## Viewing Your Recent Activity Page

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Your Recent Activity page contains a summary of all the recent activity that relates to your participation within a zone. To view your Recent Activity page, go to the Ideas tab and click your Nickname link on the right side of the page. To view the Recent Activity page of another member of the zone, click the community member’s name that appears below any idea or comment they have posted. You can view activity for the different zones you have access to by selecting a zone from the `Zone` list.

The Recent Activity page uses the following icons to identify the various types of activity:

-  identifies the ideas you have submitted.
-  identifies the ideas you have voted on.
-  identifies the comments you have posted to ideas as well as the comments other users have posted to your ideas.

For additional detail, click the following links located on the left side of the Recent Activity page:

- Ideas Submitted lists the ideas you have posted to this zone. The most recent idea appears first.
- Ideas Voted On lists the ideas in this zone that you have either promoted or demoted.
- Recent Replies displays the most recent comment posted to each of your ideas, as well as the most recent comment posted to each idea you have previously commented on. This section is not displayed when viewing another community member’s recent activity.

To quickly determine the number of recent replies you have received, look next to the recent replies icon () in the upper right corner of the Ideas tab. This icon only appears when you have received a new reply.

 **Note:** You can’t upload your own picture to replace the default image.