

WDC Implementation Guide

Salesforce, Spring '23




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SET UP WDC

Set up WDC and its features.

 **Important:** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

WDC has various features to help your sales and service teams. These features include recognizing skills and giving thanks.

After you receive your WDC licenses, set up WDC.

SEE ALSO:

[Configure WDC Features](#)


EDITIONS


Available in: Salesforce Classic

WDC is available for existing WDC customers in **Professional Edition, Enterprise Edition, Performance Edition, Unlimited Edition, and Developer Edition.**


CONSIDERATIONS FOR SETTING UP WDC

Plan out your implementation before enabling WDC in your organization.

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 **Note:** On May 1, 2020, we rebranded this suite. It's now called WDC. If you're looking for information about our Work.com solution in response to the COVID-19 crisis, see Promote Wellness and Productivity with Work.com.

Before beginning the implementation process, Salesforce must enable WDC permissions and provision WDC licenses for your organization. Contact Salesforce to coordinate this with you. Meanwhile, check if your organization has available WDC licenses: in Setup, enter *Company Information* in the *Quick Find* box, then select **Company Information**, and check for WDC User under **Feature Licenses**.

 **Note:** We recommend that you enable Chatter regardless of the edition your org is using. Many WDC features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter *Chatter Settings* in the *Quick Find* box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

When using WDC features in the mobile app, you can't create custom badges.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

WDC is available for existing WDC customers in **Professional Edition, Enterprise Edition, Performance Edition, Unlimited Edition, and Developer Edition.**

USER PERMISSIONS

To enable WDC features:

- Customize Application

To assign permission sets:

- Assign Permission Sets

To assign profiles:

- Manage Users

To set field-level security:

- Manage Profiles and Permission Sets


AND


Customize Application

ENABLE WDC

Assign a WDC Administrator

Before enabling WDC in your organization, you must assign a WDC user feature license to the person who will be the system administrator and responsible for setting up WDC for your organization.

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If you're the administrator setting up WDC, assign the license to yourself.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Find the name of the person who will be the system administrator and click **Edit** next to their name.
3. In the right-hand column, select the **WDC User** checkbox.
4. Click **Save**.

We strongly recommend that you create a separate WDC Administrator profile with limited access because the standard Salesforce System Administrator profile is so powerful. For more information, see [Create Your WDC Administrator Profile](#).

EDITIONS

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USER PERMISSIONS


To assign a WDC administrator:

- [Customize Application](#)


Enable WDC Features

Administrators can enable preferences for WDC features on the WDC Settings page.

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1. From Setup, enter *WDC Settings* in the **Quick Find** box, then select **WDC Settings**.
2. Select the WDC features you want to enable:

Feature	Section	Description
Enable Thanks	Thanks Settings	<p>Enable Thanks to allow users to recognize others with thanks badges on the Chatter feed.</p> <p>If you disable this setting, users no longer see the Thanks action in the Chatter publisher. However, they can still see previously created Thanks posts.</p>
Enable Skills	Skills Settings	<p>Enable Skills to allow users to add skills to their profiles and endorse the skills of other users. Enabling this setting replaces the Knowledgeable About widget on Chatter profiles.</p>
Restrict Skill and Endorsement Editing to Record Detail Pages	Skills Settings	<p>Disables inline editing of skills and endorsements on Chatter profiles, and restricts editing to record detail pages. Recommended if you have customized these objects with custom required fields.</p> <p> Note: Don't enable this setting if you want to use skills in Chatter profiles.</p>
Enable Automatic Skill Feed Posts	Skills Settings	<p>Enable to automatically create Chatter feed posts when a user adds a new skill.</p>
Enable Suggested Skills	Skills Settings	<p>Enable Suggested Skills to have the skills widget suggest skills for users to add based on their Chatter Topics activity.</p>

3. Click **Save**.

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USER PERMISSIONS


To enable WDC features:

- Customize Application

WDC Feature Access

Once WDC is enabled for your organization, grant users access to WDC features using either profiles or permission sets.

Administrators can grant users access to WDC features with either profiles or permission sets.

 **Note:** Professional Edition organizations will need to grant access through existing profiles.

- A profile contains user permissions and access settings that control what users can do within their organization. Each user can only have one profile. Refer to [Recommended WDC Profiles](#) for more information about creating profiles.
- A permission set is a collection of settings and permissions that gives users access to various tools and functions. Permission sets extend users' functional access without changing their profiles. Refer to [Recommended WDC Permission Sets](#) for more information about creating the proper permission sets.

If your organization has provisioned WDC Only user licenses, they come with a standard WDC Only profile. Keep in mind that you can't modify the standard profile, but you can clone it and modify the cloned profile.

IN THIS SECTION:

[Assign WDC Permission Sets](#)


Assign permission sets with WDC access to your users from Setup.


[Assign WDC Profiles](#)

Assign profiles with WDC access to your users from Setup.

Assign WDC Permission Sets

Assign permission sets with WDC access to your users from Setup.

 **Important:** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

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Before you can assign permission sets to your users, you must create permission sets with WDC access. Refer to [Recommended WDC Permission Sets](#) for more information.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Select a user.
3. In the Permission Set Assignments related list, click **Edit Assignments**.
4. To assign a permission set, select it from the Available Permission Sets box and click **Add**. To remove a permission set assignment, select it from the Enabled Permission Sets box and click **Remove**.

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USER PERMISSIONS

To assign permission sets:

- [Assign Permission Sets](#)


You can also assign permission sets to many users at the same time. For more information, see “Assign a Permission Set to Multiple Users” in the Salesforce Help.


 **Note:** Some permissions require users to have a permission set license before you can grant the permissions. For example, if you add the “Use Identity Connect” user permission to the Identity permission set, you can assign only users with the Identity Connect permission set license to the permission set.

5. Click **Save**.

Assign WDC Profiles

Assign profiles with WDC access to your users from Setup.

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Before you can assign profiles to your users, you must create profiles with WDC access. Refer to [Recommended WDC Profiles](#) for more information.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Click **Edit** next to a user.
3. From the **Profile** drop-down, select the profile you would like to assign.
4. Click **Save**.

Assign WDC Licenses

After granting access to WDC features with permission sets or profiles, assign users a WDC license.

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WDC has two types of licenses.

- WDC Only user licenses are for users who don't have a Salesforce license and will only use the WDC features in your organization.

EDITIONS

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USER PERMISSIONS


To assign profiles:

- [Manage Users](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

WDC is available for existing WDC customers in **Professional Edition, Enterprise Edition, Performance Edition, Unlimited Edition, and Developer Edition.**

 **Note:** WDC Only user licenses have limited administrator functionality. Assign WDC User Feature licenses instead for users who will be administering performance summary cycles or other WDC features.

- WDC User Feature licenses are for users who also have a Salesforce license.

You may want to configure WDC features before assigning licenses to all users. For example, you may want to initially limit licenses to WDC administrators to avoid exposing certain features prior to your launch date.

IN THIS SECTION:

[Assign WDC Only User Licenses](#)


Assign a WDC Only license to users who don't have a Salesforce license and will only use WDC.


[Assign WDC User Feature Licenses](#)

Assign a WDC User Feature license to users who also have a Salesforce license.

Assign WDC Only User Licenses

Assign a WDC Only license to users who don't have a Salesforce license and will only use WDC.

 **Important:** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

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WDC Only user licenses have limited administrator functionality. Assign WDC User Feature licenses instead for users who will be administering WDC features.

1. From Setup, enter *Users* in the **Quick Find** box, then select **Users**.
2. Click **Edit** next to a user.
3. From the **User License** drop-down, select **WDC Only**.
4. Click **Save**.

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USER PERMISSIONS


To assign user licenses:

- **Manage Users**

Assign WDC User Feature Licenses

Assign a WDC User Feature license to users who also have a Salesforce license.

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1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Click **Edit** next to a user.
3. In the right-hand column, select the **WDC User** checkbox.
4. Click **Save**.

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USER PERMISSIONS


To assign user feature licenses:


- **Manage Users**

CONFIGURE WDC FEATURES

Configure WDC Features


Configure the Recognition and Skills features.

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Configure these features:


- Recognition: Create and give thanks badges
- Skills: Share and endorse skills

 **Note:** We recommend that you enable Chatter regardless of the edition your org is using. Many WDC features use the Chatter feed to notify and interact with users. To confirm that Chatter is enabled, from Setup, enter *Chatter Settings* in the *Quick Find* box, then select **Chatter Settings**, and verify that Chatter Settings is enabled.

Thanks and Skills Features

Set up Thanks and Skills features by configuring thanks in the Chatter publisher and assigning a publisher layout to profiles.

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Make sure you've enabled the desired Thanks and Recognition features prior to configuring them. From Setup, enter "WDC Settings" in the *Quick Find* box, then select **WDC Settings** and enable the relevant settings.

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IN THIS SECTION:

[Configure Thanks in the Chatter Publisher and Salesforce Mobile App Action Bar](#)


You can change the position of the Thanks action in the Chatter publisher and the Salesforce mobile app action bar, or even hide Thanks for specific profiles.


[Assign Publisher Layout to Profiles](#)

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

Configure Thanks in the Chatter Publisher and Salesforce Mobile App Action Bar

You can change the position of the Thanks action in the Chatter publisher and the Salesforce mobile app action bar, or even hide Thanks for specific profiles.

 **Important:** Starting in Spring '22, WDC isn't available to new Salesforce customers. For existing customers, WDC features and records from Badges, Skills, and Thanks aren't affected and will remain available in the application beyond Spring '22. WDC Goals, Coaching, Feedback, Performance, and Rewards features won't appear in the application anymore, and records created previously will no longer be accessible.

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To modify the Chatter publisher, actions in the publisher must be enabled.

1. From Setup, enter *Chatter Settings* in the Quick Find box, then select **Chatter Settings**.
2. Confirm that **Enable Actions in the Publisher** is selected in the Actions in the Publisher section. If it isn't enabled, click **Edit**, select **Enable Actions in the Publisher**, and click **Save**.
3. From Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**.
4. Click **Edit** next to the Global Publisher Layout.
5. Drag the **Thanks** action to where you want it to appear in the Chatter publisher or the Salesforce mobile app action bar.
6. Click **Save**.

You can hide Thanks for specific users by changing profile visibility settings.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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USER PERMISSIONS


To set up actions:

- Customize Application

Assign Publisher Layout to Profiles

Assign the publisher layout with Thanks to user profiles. People with these profiles can thank their coworkers directly from the publisher.

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If not everyone in your organization should have this feature, create another layout without Thanks and assign it to a profile. People with that profile won't see Thanks in their publisher.

1. From Setup, enter *Publisher Layouts* in the Quick Find box, then select **Publisher Layouts**.
2. Click **Publisher Layout Assignment**.
3. Click **Edit Assignment**.
4. Select a user profile by clicking anywhere on its row in the table.
5. From the Publisher Layout to Use drop-down, select the global publisher layout that you want to assign to the highlighted profile.
6. Save the layout.

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USER PERMISSIONS

To set up quick actions:

- Customize Application

CONFIGURE WDC REPORTS AND DASHBOARDS

Configure WDC Reports

Use reports and dashboards to see how WDC features are being used in your organization.

Salesforce reports and dashboards are available for all WDC users. Administrators should install the reporting package that applies to their WDC edition. The WDC reporting package contains:

- Custom report types for WDC objects
- Custom fields for WDC objects
- Example dashboards

Install one of the following packages based on the WDC edition you purchased. Refer to your product contract to confirm which WDC edition you have.



Note:

- Make sure you've enabled the features related to your WDC edition prior to installing the package. The package will only install correctly if you've enabled the features beforehand.
- It is not possible or necessary to install all the packages.

Production Packages:

- [Thanks and Skills Reports and Dashboards](#)

Sandbox Packages:

- [Thanks and Skills Reports and Dashboards](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#))

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WDC Perform Package Details

The WDC reports and dashboards included in the reporting package are a good starting point. Use these examples to create reports and dashboards that are useful to your organization.

WDC Perform Package Reports

These reports are available after installing the [WDC Perform](#) package. WDC reports are organized in folders based on features:

- WDC Recognition Reports
- WDC Skills Reports

EDITIONS

Available in: Salesforce Classic

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

Table 1: WDC Recognition Reports

Report Name	Description
Badges Given - By Date Given	Thanks badges given grouped by the date each badge was given
Breakdown of Badges Given	Thanks badges given grouped by individual badges and the role of the badge giver

Report Name	Description
Breakdown of Badges Received	Thanks badges received grouped by individual badges and the role of the badge recipient
Thanks by Giver	Thanks badges given by each user
Thanks Given - Recipient Data	Thanks badges received by each user
Thanks Received by Role	Thanks badges received by each role

Table 2: WDC Skills Reports

Report Name	Description
Most Endorsed People	Users with the most skill endorsements
Most Skilled People	Users with the most associated skill records
New Skill Creation By Date	Skills arranged by the date they were created
Skill Endorsements By Date	Endorsements arranged by the date they were created
Skills Added To Profiles By Date	Skills arranged by the date they were associated with different user profiles
Top Skills	Skills arranged by the number of people with the skill

WDC Perform Package Dashboards

These dashboards are available after installing the [WDC Perform](#) package:

- WDC Recognition Dashboards
- WDC Skills Dashboards

Table 3: WDC Recognition Dashboards

Report Name	Description
Recognition Dashboard	Displays badge statistics and users giving and receiving badges

Table 4: WDC Skills Dashboards

Report Name	Description
Skills Dashboard	Displays skills statistics for your organization

RECOMMENDED WDC PERMISSION SETS

Create different permission sets for different types of WDC users.

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Create new permission sets for each type of WDC user.

Use the tables below to assign the appropriate object settings and system permissions for each permission set.

EDITIONS

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Standard User

The Standard User permission set gives a user all the basic WDC functionality.

Table 5: Standard User Object Settings

Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available						
	Visible						
Documents							
Endorsements							
Recognition (tab)	Available						
	Visible						
Skills	Available						
	Visible						
Skill Users							

Table 6: Standard User System Permissions

System Permissions	Enabled
API Enabled	
Edit Events	
Edit Tasks	

WDC Administrator

The WDC Administrator permission set gives a user full administrative access to WDC objects and features. This permission set should be assigned instead of the Standard User permission set.

Table 7: Standard User Object Settings



































Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Available 						
	Visible 						
Documents							
Endorsements							
Skills	Available 						
	Visible 						
Skill Users							


Table 8: WDC Administrator System Permissions

System Permissions	Enabled
API Enabled	
Edit Events	
Edit Tasks	
Moderate Chatter	
View Setup and Configuration	


RECOMMENDED WDC PROFILES

Create different profiles for different types of WDC users.

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Create a new profile for each type of WDC user. For more information about creating profiles, see either [Work in the Original Profile Interface](#) or [Work in the Enhanced Profile User Interface Page](#) depending on whether you have the Enable Enhanced Profile User Interface preference turned on.

 **Note:** Professional Edition organizations will need to grant access through existing profiles. The WDC Only User, Chatter Only User, and Standard User profiles grant basic access to WDC objects. The System Administrator profile grants users full administrative access to all WDC features.

Use the tables below to assign the appropriate object settings and system permissions for each profile.

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Standard User

The Standard User profile gives a user all the basic WDC functionality.

Table 9: Standard User Object Settings

















Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Documents							
Endorsements							
Recognition (tab)	Default On						
Skills	Default On						
Skill Users							

Table 10: Standard User System Permissions

System Permissions	Enabled
API Enabled	
Edit Events	
Edit Tasks	

WDC Administrator

The WDC Administrator profile gives a user full administrative access to WDC objects and features.

Table 11: WDC Administrator Object Settings





























Object Name	Tab Settings	Read	Create	Edit	Delete	View All Data (VAD)	Modify All Data (MAD)
Badges (tab)	Default On						
Documents							
Endorsements							
Recognition (tab)	Default On						
Skills	Default On						
Skill Users							

Table 12: WDC Administrator System Permissions

System Permissions	Enabled
API Enabled	
Edit Events	
Edit Tasks	
Moderate Chatter	
View Setup and Configuration	