Experience Cloud Sites Managers Guide

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MANAGE YOUR EXPERIENCE CLOUD SITES FOR SUCCESS

Monitoring and managing your Experience Cloud site is the key to ensuring the site is a success.

This guide is intended to introduce you to the roles that help ensure a site is successful, and the tools that they can use to achieve that success.

Great sites don't just happen; there are many people involved, from the designer to the implementer to the developer who performs customizations. But once a site is up and running, the community manager and moderator are crucial to making sure it succeeds. These two roles combined help to ensure that the site is:

- Active: Members are logging in regularly
- Engaged: Members feel motivated to actively participate on a regular basis
- Healthy: Member are posting, commenting, and sharing appropriate and helpful information. Inappropriate information or files are removed.

MANAGERS, MODERATORS, AND ADMINS WORKING TOGETHER

Experience Cloud sites can thrive when their managers, moderators, and admins understand their unique roles and work together effectively.

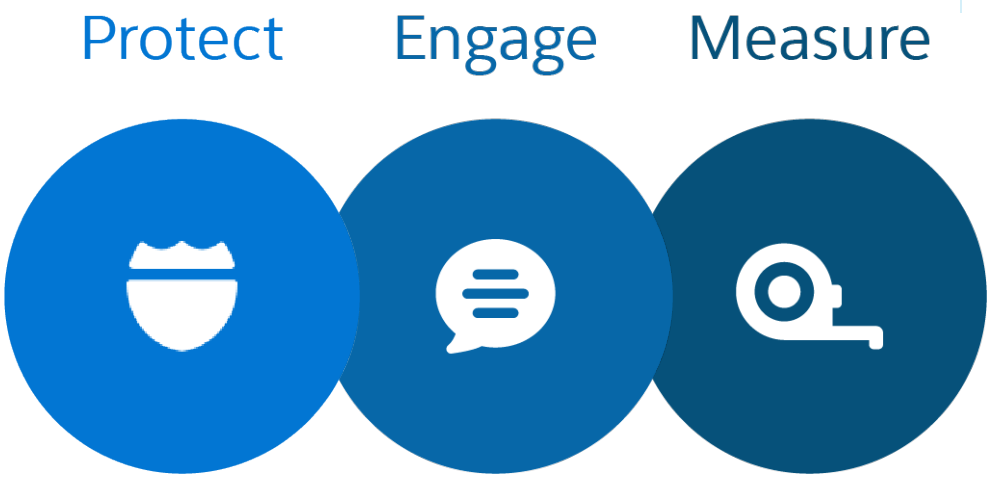
An Experience Cloud site manager and moderator work hand-in-hand. They're partners and support one another in fostering engagement and harmony. Sometimes, they perform some of the same tasks, but each has unique contributions. The site manager monitors adoption and engagement and the moderator ensures that the site is a healthy environment and that members feel encouraged to be active and helpful to each other.

Experience Cloud site managers, moderators, and admins all work together to protect, engage, and measure a site's success.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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



Prevent spammers, bots, and trolls from attacking the site.

Protect the site from trademark infringement and legal issues.

Ensure site members use appropriate language and adhere to the terms of use.

Welcome new members, add contributors, and connect members with resources.

Help ensure that members questions are answered quickly.

Acknowledge helpful members and thank them.

Identify, encourage, groom, and retain MVPs.

Review analytics on community health.

Measure return on investment (ROI) and key performance indicators (KPI), such as money saved and cases deflected.

Identify and track community trends.

Assign an Experience Cloud Site Manager

To assign a user as an Experience Cloud site manager, give them the Manage Experiences permission.

Assign a Moderator

Make one or more people moderators in your Experience Cloud site so they can keep an eye on its content.

Assign an Experience Cloud Site Manager

To assign a user as an Experience Cloud site manager, give them the Manage Experiences permission.

Experience Cloud site managers must be internal site users. Site managers require the Manage Experiences permission so that they can access Experience Workspaces.

Note: To enable Experience Workspaces, go to **Digital Experiences** > **Settings**.

1. From Setup, in the Quick Find box, enter *Permission Sets*, select **Permission Sets**, and then click **New**.
2. Create a permission set for the Manage Experiences permission.
3. Go to **System** > **System Permissions**, and click **Edit**.
4. Select **Manage Experiences**, and save your changes.
5. From Setup, in the Quick Find box, enter *Users*, and then select **Users**.
6. Add the new permission set to the managing user's Permission Set Assignments related list.

The user can now manage the site through Experience Management or Experience Workspaces.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

Assign a Moderator

Make one or more people moderators in your Experience Cloud site so they can keep an eye on its content.

Moderators can be users from your internal org or external users with Access Experience Management and moderation permissions. External users who are moderators but don't have management and moderation permissions can moderate within context of the Experience Cloud site, such as directly in the site feed.

You can assign moderators by assigning a permission set that includes one or more of these moderation permissions.

Permission	Lets Users
Moderate Experiences Feeds	Review flagged posts and comments and take action, such as removing flags or deleting the post or comment. Moderator options for feed content are available in the site feed and in Experience Management and Experience Workspaces.
Moderate Experiences Files	Review flagged files they have access to and take action, such as removing flags or deleting the file. Moderator options for files are available on a file's detail page and in Experience Management or Experience Workspaces.
Moderate Experiences Chatter Messages	Review flagged messages and take action, such as removing a flag or deleting a message. This permission allows users access to flagged messages only in Experience Cloud sites they're a member of.
Can Approve Feed Post and Comment	Approve, delete, or edit posts and comments that are pending review.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To assign permission sets:
- Assign Permission Sets

Permission	Lets Users
Moderate Experience Users	Freeze external users who are members. Moderators can freeze members on their user profile page or from an Insights report.
Manage Experiences	Moderate content in Experience Management or Experience Workspaces.
Access Experience Management	Access site pages from Experience Management and Experience Workspaces.

You can also add these permissions to a profile. These permissions are valid for all Experience Cloud sites the user is a member of, but don't apply in your internal org.

1. From Setup, enter *Permission Sets* in the Quick Find box, then select **Permission Sets**, then click **New**.
2. Create a permission set that includes the appropriate permissions.
3. From Setup, enter *Users* in the Quick Find box, then select **Users**.
4. Find the user you want to be a moderator and add the permission set to their Permission Set Assignments related list.

After you grant moderator permissions to a user, keep these things in mind.

- The user can now moderate any items they have access to in all Experience Cloud sites they're a member of.
- The user can flag items even if Allow members to flag content is disabled in a site.
- Moderators can receive an email notification when a post, comment, or file is flagged by selecting the Flag an item as inappropriate email notification.

THE ONE-STOP SHOP: EXPERIENCE CLOUD SITE MANAGEMENT

Experience Cloud Site Management Overview

Set up and monitor your Experience Cloud site from Experience Workspaces. You can manage basic setup information including membership and branding, dashboards, reputation levels and points, and topics.

Experience Workspaces gives Experience Cloud site admins, managers, and moderators a central place to monitor the health of their site and its members.

Get Started with Experience Cloud Site Dashboards and Insights

Dashboards in Experience Workspaces provide essential reports for managing your Experience Cloud sites. Insights help you drill down to the source of activity and take action.

Let us do the hard work for you! Install the Salesforce Communities Management package and get preconfigured dashboards and Insights. Check out your new mapped pages. Click Dashboards and Engagements in Experience Workspaces. Don't be afraid to customize the preconfigured dashboards and Insights to fit your site's needs. You can edit the source reports or dashboards at any time.

Alternatively, create your own dashboards and Insights. Create custom dashboards and custom Insights. Map those dashboards and Insights in Experience Workspaces.

Report on Experience Cloud Sites with AppExchange Packages

The Salesforce Communities Management packages give community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Experience Workspaces.

Use the Salesforce Communities Management package to:

- Take advantage of the newest features using preconfigured reports (use the latest package version)
- View the latest metrics and rapidly spot trends
- Determine how fast your Experience Cloud site is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas that need attention
- Take immediate action on recent activity with Insights reports
- Understand the health of your community with the Service Community Scorecard

Note: To use the preconfigured Insights reports, your Experience Cloud site must use Chatter.

During installation, dashboard and report folders are automatically installed in your internal org. You also have the option to give your community managers access to the package contents so you don't have to share the dashboard and report folders with them later. If you have no previous Insights or dashboards mapped in Experience Workspaces, they're automatically mapped for you during installation.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Applies to: Aura and Visualforce sites

USER PERMISSIONS

To install AppExchange packages:

- Download AppExchange Packages

Search AppExchange for Salesforce Communities Management (for Communities with Chatter) or Salesforce Communities Management (for Communities without Chatter).

Each package has related documentation, attached as a PDF, to help guide you with your installation and customizations.

After the package is installed, you can access your new dashboards and reports alongside all your other Salesforce dashboards and reports. When you view the dashboards in Experience Workspaces, site-specific data is displayed.

Note: The mappings for the Moderation report folders are included in the Salesforce Communities Management for Experience Cloud Sites managed package and you can't delete them. To remove the mappings, uninstall the package. The uninstall procedure deletes all report folders and dashboards included in the package.

Experience Cloud Site Moderation Strategies and Tools

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Moderation allows you to empower members of your Experience Cloud site to monitor content and ensure that it's appropriate and relevant. Set up rules to automate moderation and do the heavy lifting for you.

Moderation is crucial for an Experience Cloud site to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your site are appropriate and helpful. It's also critical to empower members to speak up when they view something as inappropriate or offensive.

With moderation, you can:

- Designate specific users as moderators so that they can closely monitor the site
- Allow members to flag posts, comments, files, and messages that are inappropriate or spam
- Allow moderators to review and act on flagged items, such as deleting a post, comment, or file
- Allow group owners and managers to moderate within their groups
- Create rules and criteria to automatically block, flag, replace keywords in member-generated content, such as posts or comments
- Create rules to review and approve content from specific members
- Track flagging and moderation activity within your site

To limit the size and types of files allowed in your site, in Experience Workspaces, go to **Administration** > **Preferences**.

To report on moderation activity in your sites, you can use the preconfigured reports from AppExchange. For more information about the AppExchange package, see Report on Experience Cloud Sites with AppExchange Packages. You can also query flagged content or activity using the API, or create a custom report type using `Networks` as the primary object.

If you want to create custom advanced moderation logic for your Experience Cloud site, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

If your org is using Transaction Security, moderation offers some of the same functionality. Transaction Security and moderation can be used at the same time.

Track Experience Cloud Site Activity with the Moderation Overview Page

Moderation Insights are arranged in clickable tiles on the Moderation Overview page in Experience Workspaces. View the entire picture of your site's moderation activity at a glance and take action on day-to-day moderation tasks.

Enable Members to Flag Items in Your Experience Cloud Site

Turn on flagging for your Experience Cloud site to let members flag posts, comments, files, and messages that they deem inappropriate.

Create Criteria to Moderate Your Experience Cloud Site

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

Create Rules to Moderate Your Experience Cloud Site

Moderation rules help protect your site from spammers, bots, and offensive or inappropriate content. Create and modify rules for your Experience Cloud site to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take.

Review and Approve Posts and Comments in Your Experience Cloud Site

Moderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your Experience Cloud site. Posts and comments pending review aren't displayed in the feed; only the author and moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the feed and in Experience Workspaces.

Moderate Flagged Items in Your Experience Cloud Site

Moderators can review and act on flagged items in their Experience Cloud sites.

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your Experience Cloud site.

Experience Pulse

Experience Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create ones to meet your needs.

Experience Cloud Site Moderation Limits and Limitations

Moderation limits ensure that your Experience Cloud site performs optimally.

Track Experience Cloud Site Activity with the Moderation Overview Page

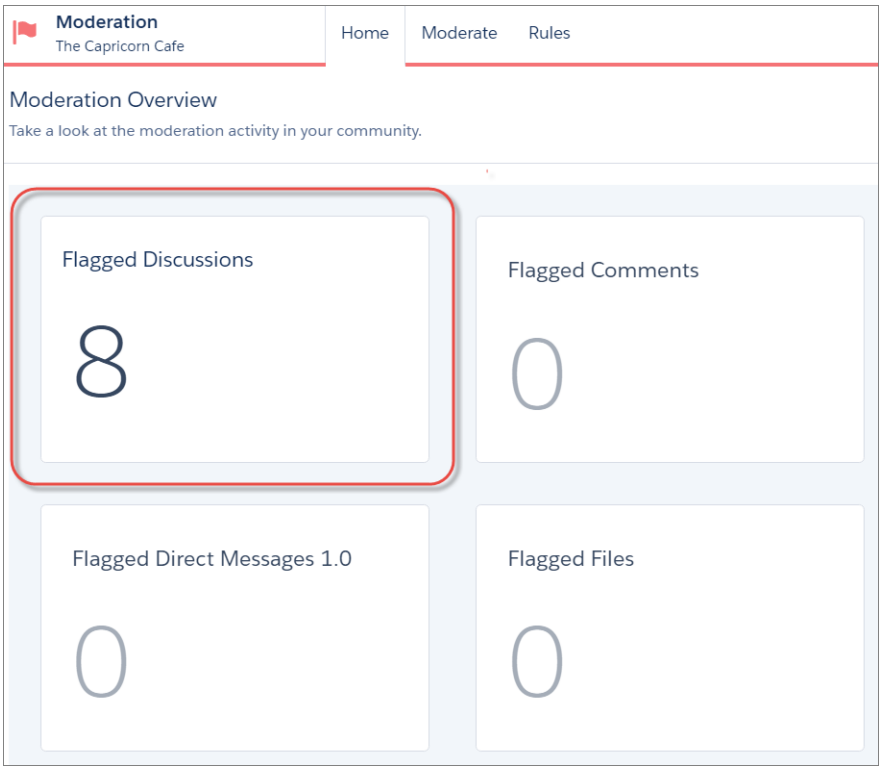
Moderation Insights are arranged in clickable tiles on the Moderation Overview page in Experience Workspaces. View the entire picture of your site's moderation activity at a glance and take action on day-to-day moderation tasks.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Example: To view all flagged posts and comments, click **Flagged Discussions** and go directly to the Flagged Discussions queue. You can approve or delete flagged posts and comments in bulk, directly from the queue.



Tip: Let us do the setup work for you! Install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange.

Insight reports provided in the package are 100% customizable. You can change the default Insights page names, report folder mappings, and even the Insights report columns and filters at any time. So don't be afraid to customize or change what you get in the package. You won't hurt our feelings.

Enable Members to Flag Items in Your Experience Cloud Site

Turn on flagging for your Experience Cloud site to let members flag posts, comments, files, and messages that they deem inappropriate.

If you haven't already, install the Salesforce Communities Management (for Communities with Chatter) package from AppExchange.

The `Allow members to flag content` preference enables:

- Members to flag posts, comments, and files using the `Flag as inappropriate` option.
- Members to flag messages from within the Experience Cloud site on their My Messages page in Chatter. If a member has turned on email notification for messages, they can also flag the message directly from their email. Members can only flag messages that are sent from sites they're members of.

  Note: Messages can't be flagged in partner or customer portals, your internal org, or from the Salesforce mobile app.

- Group owners and managers to moderate the groups they own or manage.

This setting isn't required to flag or moderate items using the API.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**, then select **Allow members to flag content**.
3. Click **Save**.

If you want to create custom advanced moderation logic for your Experience Cloud site, you can create triggers that flag content. Custom triggers run behind the scenes and don't require you to allow your members to flag content.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Applies to: Aura sites

USER PERMISSIONS

To allow members to flag items:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Create Criteria to Moderate Your Experience Cloud Site

Create criteria that define keywords or groups of members. Criteria are used in rules to moderate member-generated content, such as posts and comments.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Applies to: Aura sites

USER PERMISSIONS

To view, create, edit, and delete criteria:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Plan Your Use Cases

Before creating your member criteria, think about what you want to do.

- Do you want to protect your site from bots and spammers? Most spammers attack shortly after they've joined. Set up member criteria based on a user's creation date.
- Do you want to review members' first posts? Set up member criteria that target users without contributions.
- Do you want to moderate your internal users' activity? Set up member criteria to include only your internal users.
- Do you want to be notified when a partner contributes for the first time? Set up member criteria to include only your partner users that don't have contributions.

Before creating content criteria, think about what you want to moderate.

- Do you want to moderate profanities and slang? Set up separate keyword lists for each group of related words.
- Do you want to replace competitor product names with asterisks? Create a keyword list just for your competitor products.
- Do you want to monitor content for HIPAA compliance? Create a keyword list that alerts of possible HIPAA violations.

You can also use the Metadata API or Tooling API to set up keyword lists.

Create Content Criteria

Create and modify content criteria that define offensive language or inappropriate content that you don't want in your Experience Cloud site. Content criteria are used in rules to moderate member-generated content, such as posts and comments.

Some things to keep in mind:

- Your org can have up to 30 keyword list criteria. This limit is per org, not per Experience Cloud site.
- A keyword list can have up to 2,000 keywords.
- Capitalization and trailing punctuation are ignored when matching your keywords to user-generated content. For example, if your criteria include `BadWord`, it's matched when a user types `BADWORD` or `badword.`

Set up content criteria to use in your moderation rules.

1. Open Experience Workspaces.
2. Click **Moderation** > **Content Criteria** > **New**.
3. Enter a name, unique name, and description for your criteria.
4. Click **Save**.
5. Update the keywords in your criteria.

   To add keywords, click **Add**.

   - Keywords can only be up to 100 characters and can include letters, numbers, spaces, and special characters.

- Wildcard characters aren't supported.
- Separate keywords with commas or line breaks.
- When adding keywords, you can copy and paste up to 32,000 characters at a time.

Tip: To cover different variations of the same word, you can use special characters and spaces. For example:

```
bad-word
b@dword
b a d w o r d
```

To delete keywords, select the keywords you want to remove, then click **Delete**.

A message indicates how many keywords were added or failed to add, and the number of duplicates that were ignored. If your entire entry failed to save, review the keyword requirements and then submit again. Don't worry about adding duplicates because they're ignored.

To delete criteria, click **Del** from the Content Criteria page. If criteria are being used by a rule, you can't delete them.

Create Member Criteria

Create and modify member criteria to use in moderation rules. Target specific groups of members based on their user profile, user type, user creation date, or whether they've posted or previously commented in the Experience Cloud site. Use member criteria in your rules to help pin-point specific use cases, like reviewing posts only from your customer users who were created in the last seven days.

Some things to keep in mind:

- Your org can have up to 100 member criteria. This limit is per org, not per Experience Cloud site.
- Each member criteria can include up to 100 user conditions.

You can create criteria that include only user types and user profiles, or just filters. Or if you want it all, your criteria can include user types, user profiles, and filters. Let's get started.

1. Open Experience Workspaces.
2. Click **Moderation** > **Member Criteria**, then click **New**.
3. Enter a name, unique name, and description for your criteria.
4. Select the types of user types or user profiles to include in your criteria.

   You can select any combination of types and profiles. Members are included when they belong to *any* one of your selections.

   If you delete a profile in your internal org, the profile is also removed from your member criteria.

5. Select to filter your members by:
   - `None`—Select this option if you don't want to filter the criteria using the other options. None is the default selection.
   - `User creation date`—Select this option to include only users that were created within a specific time frame. Enter the number of days since the user was created.

     Note: A user's creation date might not be the same date they became a member of the Experience Cloud site. For example, you can have an internal user that was created 120 days ago who became a member of the site five days ago. For users that self-register, their creation date is the date they become a member of the site.

   - `Members without site contributions`—Select this option to include only members that haven't posted or commented in the Experience Cloud site. Posts that are pending review don't count as contributions until they're approved.

If you selected user types or user profiles, and you also select filter conditions, members are included only if they belong to one of the selected user types or profiles *and* the filter condition.

6. Click **Save** to apply your changes.

Example: Let's look at the following conditions:

`User Types`: Partner

`User Profiles`: Customer Community Plus Login User, Customer Community Plus User, and Customer Community User

`Filter By`: User creation date is set to seven days since the user was created

This member criterion applies to:

- Partner users created in the last seven days
- Customer Community Plus Login User created in the last seven days
- Customer Community Plus User created in the last seven days
- Customer Community User created in the last seven days

You can use this member criteria in a rule to:

- Review and approve their posts
- Be notified of their contributions
- Flag all their contributions

To delete criteria, click **Del** from the Member Criteria page. If criteria are being used by a rule, you can't delete them.

Create Rules to Moderate Your Experience Cloud Site

Moderation rules help protect your site from spammers, bots, and offensive or inappropriate content. Create and modify rules for your Experience Cloud site to moderate member-generated content. Each rule specifies the member-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take.

Your Experience Cloud site comes populated with content and rate limiting moderation rules that block, flag, freeze, replace, or review banned keywords. Simply activate the rules and they're ready to go. You can customize both the rules and the list of banned keywords in the Rules section of the Moderation workspace.

Alternatively, you can create your own custom moderation rules as needed. You can also use the Metadata API or Tooling API to set up content rules.

If your Experience Cloud site uses the Customer Service template, moderation rules apply to questions and group posts created by your members. If your Experience Cloud site uses Salesforce Tabs + Visualforce, moderation rules can also run on publisher actions.

Some things to keep in mind:

- Your org can have up to 30 rules. This limit is per org, not per Experience Cloud site. This limit includes both content rules and rate rules.
- Each content rule can have up to 3 keyword criteria and 10 member criteria. And each rate rule can have up to 10 member criteria.
- Preconfigured moderation rules apply only to feed posts, comments, and polls.

Tip: Before creating a rule, we recommend that you create criteria to use in the rule.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

Applies to: Aura sites

USER PERMISSIONS

To view, create, edit, and delete rules:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

When Do Moderation Rules Run?

Rules that block content run first, followed by rules to review and approve content, then rules that replace content, and last by rules that flag content.

If two or more rules perform the same action, the oldest rule runs first, based on the date the rule was created. Rules to replace content don't run when the content also applies to a review rule—we want moderators to review the original content. On the server, Salesforce executes Experience Cloud site rules within the standard order of execution.

Create or Modify Content Rules

To block, replace, flag, or allow you to review and approve member-generated content, create content rules.

1. Open Experience Workspaces.
2. Click **Moderation** > **Rules**.
3. Click **Edit** next to an existing rule. To create a rule, click **New** > **Content Rule**.
4. Add or update the rule details, including a unique name that's used by the API, and select **Activate Rule** to enable the rule.
5. In Rule Conditions:
   - Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles. All feed types, such as polls and links, are supported.
   - Choose whether to block content from being published, allow reviewers to approve the content before it's published, replace keywords with asterisks, or flag inappropriate content.
   - Specify the message that your member sees when their content is blocked. If you don't specify a message, the member sees the standard message: "You can't use `%BLOCKED_KEYWORD%` or other inappropriate words in this site. Review your content and try again." The `%BLOCKED_KEYWORD%` variable displays up to 5 blocked words. You can also use this variable in your own custom message.

     For international sites, you can translate this message. From Setup, enter `Translate` in the Quick Find box, then select **Translate**. To provide a translation for the message, select the Moderation Rule setup component and expand the site the rule belongs to.
6. In Criteria, specify member criteria and content criteria to enforce this rule. Think about who the rule applies to and the specific keywords involved.
7. Save your changes.

Keep the following things in mind:

- If you activate a content rule without specifying member criteria, the rule applies to all members.
- If you activate a content rule without specifying content criteria, the rule either:
  - Stops members from creating posts and comments entirely
  - Sends all posts for review
  - Flags all posts and comments
- If you select member criteria and content criteria, the rule applies only when both criteria are met.
- Specifying criteria is optional. However, we recommend that you include criteria in your rules to target specific members and content.

Create Rate Limit Rules

To monitor and limit how frequently member-generated content is created, create or modify rate rules. Rate rules protect your Experience Cloud site against spammers and bots that attack your site by posting the same message multiple times in a row. You can create rate rules to notify your moderators of suspicious spammer-like behavior or freeze a member on the spot.

Each rate rule controls two actions: notification and freeze. You can set up your rate rule for both actions or just one. You can apply the rule to: posts, comments, files, and private messages. In Experience Cloud sites that use the Customer Service template, you can apply rules to questions and answers.

1. Open Experience Workspaces.
2. Click **Moderation** > **Rules** then click **New** and select **Rate Rule**.
3. In Rule Conditions:
   - Specify which types of member-generated content this rule applies to. Posts and comments only apply to content created in groups and user profiles.
   - Specify the member criteria that trigger this rule. If you activate a rate rule without specifying member criteria, the rule applies to all external users. If you activate a rate rule without specifying member criteria, the rule applies to all external users.

     Spammers are typically new members. We recommend creating member criteria that only include customer users that were created in the last seven days.
   - Specify the time frame that the rule applies to. Determine how much content can be created within that time frame before the moderator is notified. Determine how much content can be created before the member is frozen.

     When members are frozen, they're frozen in all sites that they're a member of.

     Emails are sent to users with the Moderate Experience Users permission. Make sure that you assign your moderators this permission. Emails are sent even if a user has turned off Chatter emails.
4. Activate the rule.
5. Save your changes.

Example: Let's use the following rate rule as an example.

`Applies To`: Posts and private messages

`Member Criteria`: Customer users created in the past 7 days

`Content Creation Time Frame`: 3 minutes

`Notify Moderators`: 6

`Freeze Members`: 10

With this rate rule, here's what happens when a member reaches your limits.

In the span of 3 minutes, a member creates...	Is the moderator notified?	Is the member frozen?
4 posts and 2 private messages	✓	✗
6 posts	✓	✗
6 comments	✓	✗
8 posts and 2 private messages	✓	✓
10 posts	✓	✓

In the span of 3 minutes, a member creates...	Is the moderator notified?	Is the member frozen?
10 comments	✖	✖

A rate rule with these values protects the site from spammers and bots but also allows you to help your new members. Maybe a non-threatening member posted a question over and over hoping to get it answered faster. Rate rules do more than protect—they let you help members in need.

Here's a rule set up just for private messages.

`Applies To`: Private messages

`Member Criteria`: Customer users created in the past 3 days

`Content Creation Time Frame`: 15 minutes

`Notify Moderators`: 1

`Freeze Members`: 3

This rate rule protects the site from spammers that attack via private messages.

If your rate rule doesn't take immediate effect, give it time. If you set up a rate rule to freeze members when they create content 10 times in 3 minutes. It's possible for a member to create 9 items towards the end of the first 3-minute time frame. In this case, the member isn't frozen until they post another 10 items in the second 3-minute time frame.

Check the member criteria you're using. For example, let's say you have a rate rule that uses member criteria to filter for members without contributions. After a member's first post or comment, the rule doesn't apply to the member anymore, so the member doesn't reach the freeze limit you set.

Review and Approve Posts and Comments in Your Experience Cloud Site

Moderation rules to review and approve content ensure that non-compliant and inappropriate content isn't immediately visible to everyone in your Experience Cloud site. Posts and comments pending review aren't displayed in the feed; only the author and moderators can see pending posts and comments in the feed. An author can see a pending comment on a pending post only if the author posted both. After you set up the rules, moderators can approve content directly in the feed and in Experience Workspaces.

Note: The Can Approve Feed Post and Comment permission applies not only to moderation but also to any Chatter feed a user can access. In other words, an assigned user can edit or delete any post or comment. They can take these actions whether in an Experience Cloud site or their internal Salesforce org, in any feed they have access to.

To set up a moderation rule to review and approve posts and comments, in Experience Workspaces, go to **Moderation** > **Rules** and create a content rule that uses the `Review` action. Here are some ways that you can use rules to review content.

Self-Service

Does your site allow members to self-register? You can set up a rule to review and approve questions from all your self-registering users. Use member criteria that includes only your guest user profile and filters for members who were created in the past seven days.

Have spammers ever attacked your site? Use member criteria that includes only your guest user profile and filters for members that have never contributed.

Partners

Want to ensure that your partners aren't discussing a recent acquisition or other sensitive transactions? You can set up a rule to review posts and comments that include keywords such as "acquisition" or "merger."

Employees

Does your site require HIPAA compliance? Set up your rules to review posts and comments from all your employees.

Note: Users must have Manage Experiences or Create and Set Up Experiences permissions to create moderation rules.

Pending Review is displayed in the header of the post or comment until it's approved. Remember that while a post or comment is pending approval, the author can still edit or delete it, however they can't comment on it. An author can see a pending comment on a pending post only if the author posted both. To prevent the author from editing the post or comment, you can disable feed post editing for certain users.

There are two ways to review and approve posts and comments.

- Use the preconfigured Pending Discussions Insights report on the Moderation Overview page in Experience Workspaces.

  To get this report, install the Salesforce Communities Management (for Communities with Chatter) package from the AppExchange. Use the Pending Discussions report to see all the posts and comments that are pending review. The report displays the contents of posts and comments so you can quickly assess whether that content is spam or harmless. You can then approve or delete the item directly from the report. You can also perform mass-action and approve multiple items at once.

- Approve posts and comments directly in the feed.

  In the feed, users with the Can Approve Feed Post and Comment permission see an extra action in the post or comment dropdown menu. If the item is inappropriate, they can delete it. If it has a typo, they can edit it.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To approve, delete, or edit posts and comments that are pending review: An author can see a pending comment on a pending post only if the author posted both.

- Can Approve Feed Post and Comment

To approve, delete, or edit posts and comments that are pending review:

- Can Approve Feed Post and Comment

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

After the item is approved, the author receives an email letting them know the item is approved and providing a link to it. Email notifications, such as @mentions notifications, are sent only after the item is approved.

Moderate Flagged Items in Your Experience Cloud Site

Moderators can review and act on flagged items in their Experience Cloud sites.

If you haven't already, install the Salesforce Communities Management (for Communities with Chatter) package from AppExchange. This package automatically installs multiple insight reports that you can use to moderate your site, such as the Flagged Private Messages and Flagged Files reports. It also automatically installs the Flagged Discussions and Flagged Direct Messages tiles to the Moderation tile in Experience Workspaces.

A small orange flag appears next to flagged items. The number next to the flag indicates how many people have flagged the item.

A few things to keep in mind.

- Moderators can only moderate items that they have access to.
- Group owners or managers can moderate items in their groups.
- Members can only flag messages sent from sites that they're a member and that allow members to flag content.
- You can't flag items from your internal org, the Salesforce mobile app, or in partner and customer portals.
- Site members can only flag items if the `Allow members to flag content` preference is enabled.
- If `Allow members to flag content` is disabled, only moderators can flag items and view flagged items.
- To receive an email each time an item is flagged, select **Flags an item as inappropriate** on your Email Settings page.

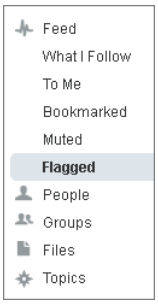
Flagged Posts and Comments

Moderators can review, delete, and remove flags from posts and comments that members flag as inappropriate. Group owners or group managers can review and moderate flagged posts and comments in their groups.

You can moderate flagged posts and comments from:

- The Flagged Discussions tile on the Moderation tile in Experience Workspaces.
- The Flagged feed in Chatter.

  If you're using a Salesforce Tabs + Visualforce Experience Cloud site, you can see a list of flagged posts and comments on the Chatter menu. To see the Flagged feed, enable the `Allow members to flag content` preference.



USER PERMISSIONS

To moderate posts and comments:

- Moderate Experience Cloud Site Feeds

  AND

  Manage Experiences OR Create and Set Up Experiences

  AND

  Can Approve Feed Post and Comment

  AND

  Is a member of the Experience Cloud site

- A custom list. You can expose a list of flagged posts and comments using Connect REST API or ConnectApi in Apex.
- The link to the post or comment from the notification email.

- The Experience Cloud site. Moderators can remove flags or delete content in the feed.

Flagged Private Messages

Moderators can review, delete, and remove flags from private messages that members flag as inappropriate or as spam.

Important: Ensure that your moderators are assigned the Moderate Experiences Chatter Messages permission, *not* the Manage Chatter Messages permission. The Manage Chatter Messages permission allows users to see *all* the messages in your entire Salesforce org.

You can monitor and manage flagged messages from:

- The Flagged Private Messages Insights report from the Moderation Overview page in Experience Workspaces. You can track trends and monitor spam. You can view flagged messages, who sent them, the date they were sent, and who flagged them. You can also remove flags from messages and delete messages.
- A custom report.

  First, create a custom report type using `Networks` as the primary object and `Network Audits` as the secondary object. Create the report using your new custom report type and add a field filter for `Audited Object Type` set to equal `Chatter Message`. Use the API to delete flagged messages.
- An API query of flagged messages.

USER PERMISSIONS

To moderate messages:
- Moderate Experiences Chatter Messages

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To view the contents of a flagged message in reports:
- Moderate Experiences Chatter Messages

To remove flags or delete messages in the SOAP API:
- Modify All Data

Flagged Direct Messages

Members can flag messages in Experience Cloud sites built using the Customer Service template. Moderators can review, delete, and remove flags from direct messages that members flag as inappropriate or spam.

Note: Private messages and direct messages are separate features. Direct messages offer a richer set of features for private communication. Direct messages are based on Chatter and offer a rich text editor that supports inline images and attachments. With direct messages, you can start a message from a feed post.

1. Open Experience Workspaces.
2. Select **Moderation** and either click the Flagged Direct Messages tile or click **Moderate** > **Flagged Messages** to see the flagged items.
3. Review and act on the flagged messages.

USER PERMISSIONS

To view and moderate flagged direct messages:

- Moderate Experiences Chatter Messages

  AND

  Moderate Chatter Messages and Direct Messages

  AND

  Moderate Experiences Feeds

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

To make all posts available to moderation, including direct messages, in Digital Experiences Settings under Moderation Rule Settings:

- Moderation applies to all feed posts regardless of where they're visible

Flagged Files

Moderators can review, delete, and remove flags from files that members flag as inappropriate or spam. Group owners or group managers can moderate files in their groups.

Members can flag files that they deem inappropriate because they contain sensitive information or offensive content.

You can moderate flagged files from:

- The Flagged Files Insights report on the Moderation Overview page in Experience Workspaces. With this report, you can see flagged files, who created them, who flagged them, and how many flags each file has. You can click a link to open a file and review its content. You can remove the flag or delete the file. You can also select multiple items at once.

  Note: After you delete a file, it remains cached for up to 90 days.

- A custom list. You can expose a list of flagged files using Connect REST API or ConnectApi in Apex.
- From the Experience Cloud site. You can remove flags or delete content on the file detail page.

To limit the size and types of files allowed in your site, go to **Administration** > **Preferences**.

USER PERMISSIONS

To view the file detail page, remove flags, and delete files:

- Moderate Experiences Files

To moderate files:

- Moderate Experiences Files

  AND

  Access Experience Management OR Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Flagged Discussions

Moderators can review, delete, and remove flags from posts and comments on discussions, and freeze or communicate with the author of those posts, all from one place.

Moderators can view an entire discussion in context, including all comments related to a post, and sort by the newest discussions or the oldest. To access a list of flagged discussions, go to **Experience Workspaces** > **Moderation** > **Flagged Discussions**. To open a discussion thread, click **View Discussion**.

USER PERMISSIONS

To view flagged items, remove flags, and delete posts or comments:

- Moderate Experiences Feeds

To moderate posts and comments:

- Moderate Experience Cloud Site Feeds

  AND

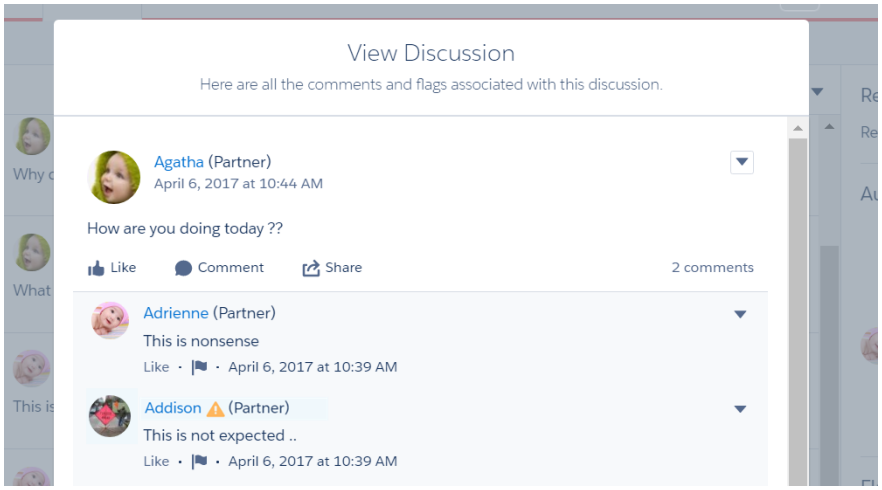
  Manage Experiences OR Create and Set Up Experiences

  AND

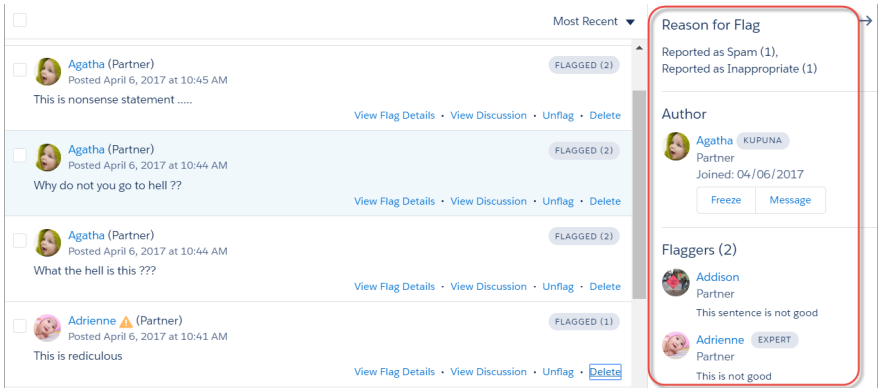
  Can Approve Feed Post and Comment

  AND

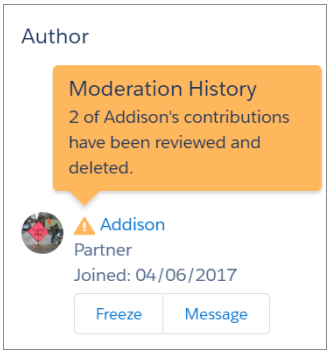
  Is a member of the Experience Cloud site



To see how a post or comment was flagged and who flagged it, click a post or comment or select **View Flag Details**. You can remove the flag or delete the post or comment.



You can see which authors have a history of flagged posts and how many times a moderator deleted their posts. You can also freeze the author and send them a message.



Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your Experience Cloud site.

Tip: Did you know you can do this in the UI? Most sites don't need custom moderation triggers. You can create moderation rules and criteria directly in Experience Workspaces. For more information, see Create Rules to Moderate Your Experience Cloud Site.

Using triggers to automatically flag items allows you to moderate your Experience Cloud site behind the scenes. These flags are only visible to moderators. You can view flags in Experience Workspaces., query for them in the API, or use custom report types to create reports on flagged items, people whose items are flagged most, and more.

Consider the following when creating triggers:

- Create Apex after insert triggers on FeedItem, FeedComment, ChatterMessage, or ContentDocument.
- Define criteria that when met creates a NetworkModeration (flag) record, with the FeedComment, FeedItem, ChatterMessage, or ContentDocument as the parent.

Example: This trigger automatically flags posts in your site that contain *BadWord*.

```
trigger autoflagBadWordOnPost on FeedItem (after insert) {

    List<NetworkModeration> flags = new
List<NetworkModeration>();

    for (FeedItem rec : trigger.new) {
        if (!<NetworkId>.equals(rec.networkScope)){
            continue;
        }

        if (rec.body.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new
NetworkModeration(EntityId = rec.id, Visibility =
'ModeratorsOnly');
            flags.add(nm);
        }
    }

    if (!flags.isEmpty()) {
        insert(flags);
    }
}
```

A similar trigger on comments would look like this.

```
trigger autoflagBadWordOnComment on FeedComment (after insert)
 {
    List<NetworkModeration> flags = new
List<NetworkModeration>();

    for (FeedComment rec : trigger.new) {
        if (!<NetworkId>.equals(rec.networkScope)) {
            continue;
```

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To create triggers:
- Modify All Data

```
        }

        if (rec.commentBody.indexOf('BadWord') >= 0) {
           NetworkModeration nm = new NetworkModeration(EntityId = rec.id, Visibility
 = 'ModeratorsOnly');
            flags.add(nm);
        }
    }

    if (!flags.isEmpty()){
        insert(flags);
    }
}
```

Experience Pulse

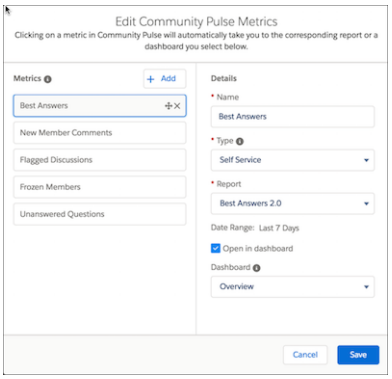
Experience Pulse displays metrics at the top of Workspaces. Click a metric to open the corresponding report or dashboard for more information or to take action. Customize the displayed metrics or create ones to meet your needs.

To get started, map reports and dashboards to your Experience Workspaces. You can either map manually or install the Winter '18 or later version of the AppExchange package. After installation, Experience Pulse displays automatically. If you have an Experience Cloud site with Chatter, four tiles display after you install the package: Members, New Members, Unanswered Questions, and Flagged Discussions.

EDITIONS

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

To customize a metric tile, click **Edit Metrics**. From here, create a metric or edit an existing one. You can have up to six metrics at a time.



By design, clicking a metric opens the corresponding report. However, selecting **Open in dashboard** lets you open a dashboard instead.

Experience Cloud Site Moderation Limits and Limitations

Moderation limits ensure that your Experience Cloud site performs optimally.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Criteria Limits

- Your org can have up to 30 keyword list criteria. This limit is per org, not per Experience Cloud site.
- Your org can have up to 100 member criteria. This limit is per org, not per Experience Cloud site.

Rule Limits and Limitations

- Each content rule can have up to 3 keyword criteria and 10 member criteria. And each rate rule can have up to 10 member criteria.
- Moderation rules apply only to feed posts, comments, and polls. Moderation rules don't apply to topics that are created.

Audit Limitations

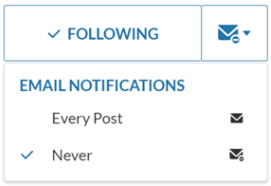
Changes to a feed item's status aren't included in the Insights report.

Organize Experience Cloud Sites with Topics

Navigational, featured, and content topics are a fantastic way to organize information and content in an Experience Cloud site and boost SEO for your articles. Use topics to structure your site's content or highlight key discussions. You can create topics or use the topics that organically emerge from site member posts.

Choose navigational topics and subtopics to provide a consistent map of your site. Use featured topics to highlight current, popular conversations. Use content topics to organize your original content. In the site itself, member-created topics let users organize information for one another, creating a personalized experience that boosts site engagement. Any article with an assigned navigational, featured, or content topic is included in search results.

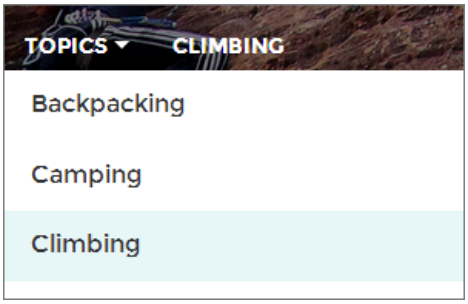
Site members can keep up to date on topics by following them and, optionally, receiving email notifications for topics they follow.



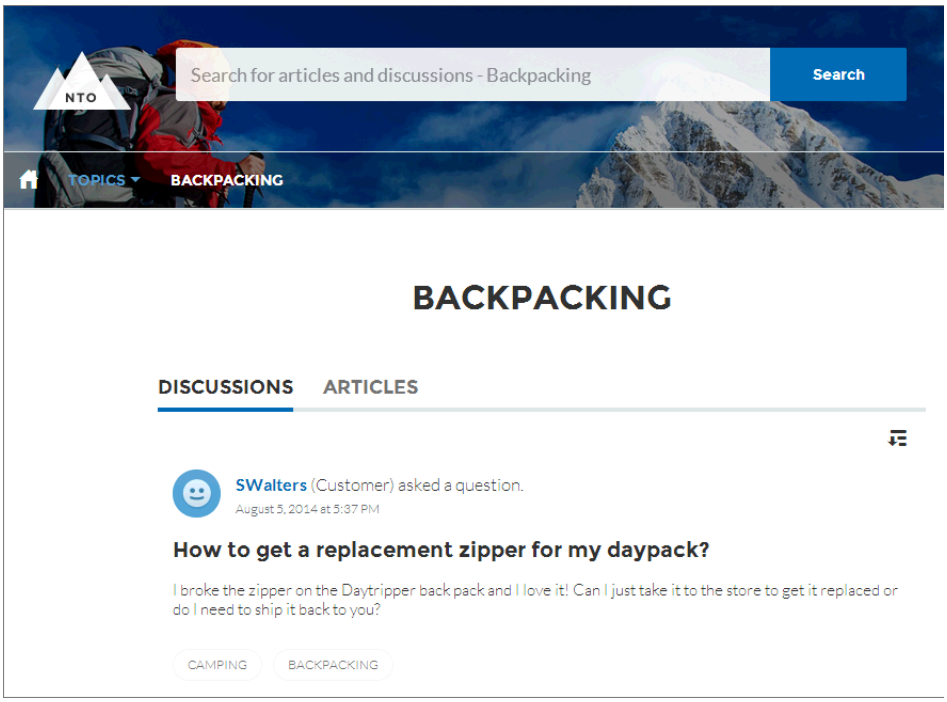
When members choose Every Post, they get notifications when a post or question is added to the topic. They don't get notifications when the hashtag topic is added to a comment, answer, or record feed.

Navigational Topics

On every page of a site, navigational topics are available from the Topics menu at the upper left. Site members can also see all the site's navigational topics and subtopics in one place in the topic catalog.



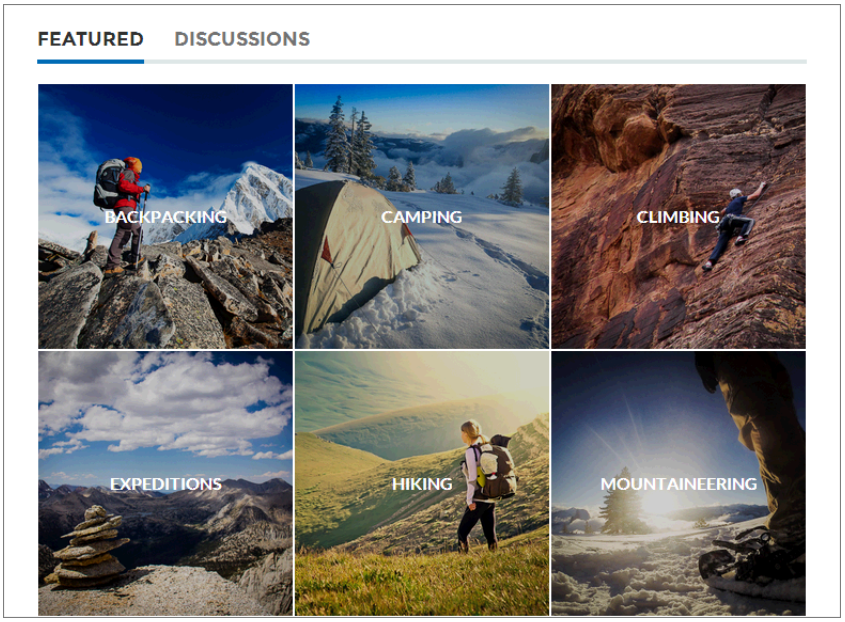
When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.



Note: Properties on the Ask and Contact Support & Ask components let you block the selection of a new topic when a user asks a question. For more information, see Ask Button and Contact Support & Ask Buttons.

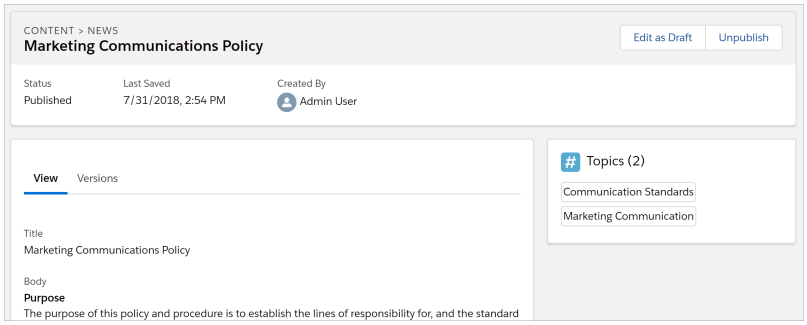
Featured Topics

Featured topics are accessible from the body of your site home page. Thumbnail images you select for featured topics uniquely identify them. (These unique thumbnails appear only on the home page; at the top of all featured topic pages, the default banner image specified in Experience Builder appears.)



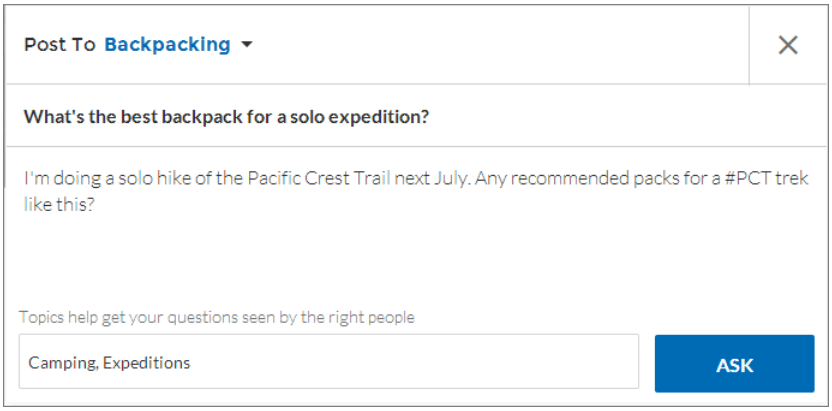
Content Topics

Content topics allow you to organize your original content around common themes. Enable topics that you're already using for content, or create topics and enable them for content. After topics are enabled for content, assign them to your native content.



Member-Created Topics

When posting questions, site members create topics by using hashtags in body text, or typing in the topic suggestions box. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for site users.)



If any suggested topics are poor matches for the post, members can simply click to delete them.

Tip: Member-created topics can be accessed via search or highlighted as featured topics.

Topic Metrics

Site members can check how often a topic has been used in the past 60 days and how many followers it has. Find metrics on a topic's detail page. With this information at their fingertips, site members know how current and popular a topic is. Admins can also use these metrics to highlight certain topics in their sites or consolidate similar topics based on usage.

Manage Topics in Experience Cloud Sites

As the number of topics in an Experience Cloud site grows, curate them to improve usability. You can create, merge, rename, enable for content, and delete topics in one convenient location.

Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your Experience Cloud site, and boost SEO for your Knowledge articles, by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. Articles added to the data category in the future are also tagged. All articles with assigned topics are included in search results.

Set Up Featured Topics

Featured topics highlight current, popular conversations in your Experience Cloud site. Change them regularly to keep members up-to-date and engaged.

Set Up Navigational Topics

Structure your Experience Cloud site's content and help your users find what they need with navigational topics. If your org uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. If data categories aren't enabled, administrators can add articles to each topic using Connect REST API.

Set Up Content Topics

Content topics organize your original content around common themes for your Experience Cloud site.

See Your Site's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your Experience Cloud site's content. Now you want your site members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your site's topic catalog.

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as your Experience Cloud site's needs change.

Translate Topics Names and Descriptions for Experience Cloud Sites with International Audiences
Use the Translation Workbench to translate topic names and descriptions in international Experience Cloud sites.

Manage Topics in Experience Cloud Sites

USER PERMISSIONS	
To access Experience Workspaces or Experience Management page:	Manage Experiences OR Create and Set Up Experiences
To create topics:	Create Topics
To merge topics:	Merge Topics AND Delete Topics AND Edit Topics AND Assign Topics
To delete topics:	Delete Topics
To edit topics:	Edit Topics

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

As the number of topics in an Experience Cloud site grows, curate them to improve usability. You can create, merge, rename, enable for content, and delete topics in one convenient location.

1. In Experience Workspaces, access topics by clicking **Content Management** > **Topics**.
2. Do one of the following.
   - To create a topic (often with a plan to merge existing ones into it), click **New**. To boost SEO, add a name and a topic description. If you want to be able to associate the topic with native content, select **Enable for content**.
   - To combine topics, click **Merge**.

     Merging a topic automatically redirects existing hashtags in posts. If you merge a navigational or featured topic, the topic type, image, and any subtopic relationships are discarded. If you merge a topic with a content topic, the content associations are preserved. If you merge a topic with an inactive endorsee, the endorsement is discarded.
   - To enable up to 10 topics for content at the same time, select the topics and click **Enable for Content**.

     After enabling topics for content, you can associate the topics with your native content.
   - To edit a topic, click and select **Edit**.

     If you deselect **Enable for content** when editing a topic that is associated with content, saving your changes removes the associations.
   - To see a topic detail page in your site, click the topic name.
   - To delete a topic, click and select **Delete**.

   If you don't see a topic you're looking for, you can search for it.

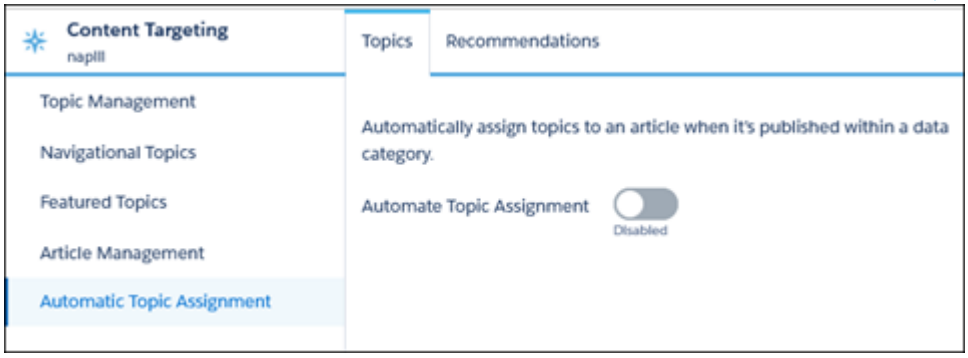
Tip: For sites with a global audience, you can translate names and descriptions of topics.

Automatically Assign Topics to Articles

Transport all your hard work of organizing Salesforce Knowledge in your Experience Cloud site, and boost SEO for your Knowledge articles, by mapping topics to data categories. All articles published with a specific data category are tagged with the topics you specify. Articles added to the data category in the future are also tagged. All articles with assigned topics are included in search results.

To use automatic topic assignments, enable Experience Workspaces in Digital Experience Settings.

1. Open Experience Workspaces.
2. Access automatic topic assignments by clicking **Content Management** > **Topics** > **Automatic Topic Assignment**.
3. Enable **Automate Topic Assignment**.



4. Select a data category group and a data category.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces:

- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

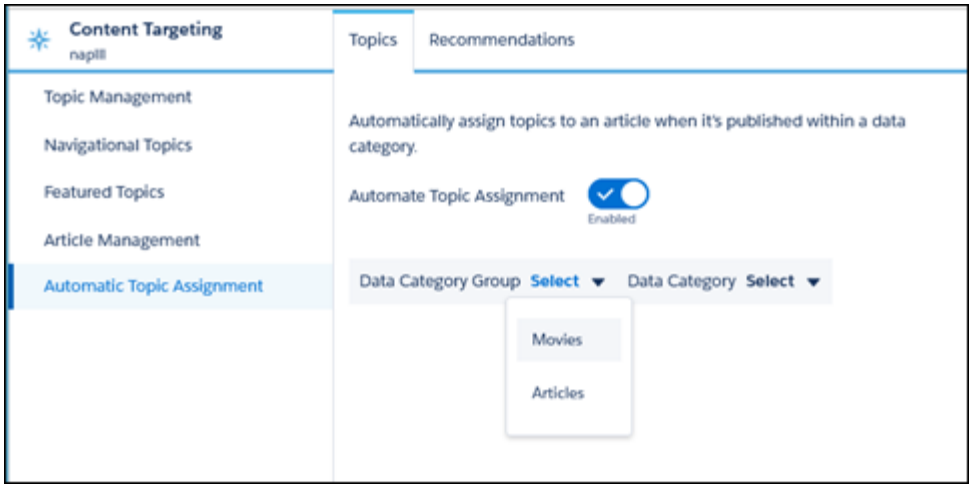
  Is a member of the site

To set up automatic topic assignments:

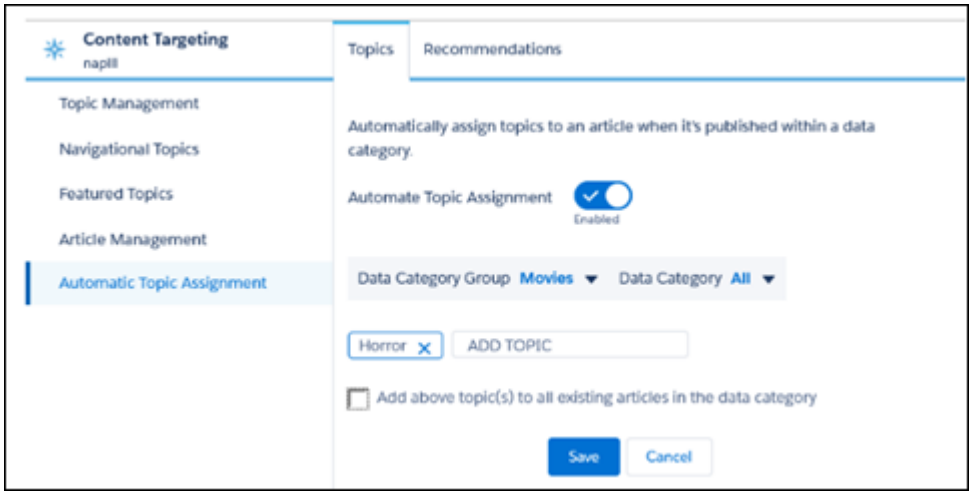
- Edit Topics

  AND

  View Data Categories



5. Add the topics that you want to assign to the articles under that data category.



6. Select the option to add the topics to existing articles in the data category. The topics are then assigned to all articles in all data categories under the data category group. If you don't select this option, the topics are added only to new articles added to the data category, and the existing articles remain unchanged.
7. Click **Save**.

Take these items into consideration as you set up your topic assignment rules.

- Topic assignments are site-specific. If you use the same article in two different sites, set up automatic assignments in both sites.
- If a translation of a topic is available in Salesforce, the translated article is tagged with the corresponding translated topic. If there's no translated topic in the system, localized articles are tagged with the base language topic.
- You can't automatically remove topics from articles. Instead, you must manually remove topics.
- If you merge two topics, you must set up new rules.
- If you automatically add a topic to a data category, the topic is added to all articles in the data categories above it in the hierarchy. Topics aren't automatically added down a hierarchy to child data categories.
- To automatically assign topics to a newly added data category, remove all existing data categories and then publish the article. Next, add all data categories at once and republish the article.

Set Up Featured Topics

Featured topics highlight current, popular conversations in your Experience Cloud site. Change them regularly to keep members up-to-date and engaged.

1. In Experience Workspaces, access featured topics by clicking **Content Management** > **Topics** > **Featured Topics**.
2. Enter the first few letters of the topic name in the search box. Select a suggested topic and click **Add**. Use navigational or member-created topics.

   Tip: Using Connect REST API, you can create unique featured topics that are separate from navigational or member-created ones.

3. Hover over a topic name, and click . Then click **Upload thumbnail image**, and select an image that represents the featured topic on the site home page.

   Thumbnail images are scaled to 385 x 385 pixels. To prevent distortion, create image files with those dimensions.

   To ensure guest users can see featured topic images in your site, select Let guest users view asset files and CMS content available to the site in **Administration** > **Preferences** in Experience Workspaces. This selection also allows guest users to see images associated with recognition badges, site branding, and account branding.

4. Repeat steps 3 and 4 to create several featured topics for your site, up to a maximum of 25. Then click **Save**.

To edit featured topics, hover over a topic name.

- To move topics up or down, click the arrows at left.
- To delete topics or change their thumbnail images, click .

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management page:

- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

  Is a member of the site

To set up featured topics:

- Edit Topics

To create, edit, and delete images for featured topics:

- Create, Edit, and Delete on the image record

Set Up Navigational Topics

Structure your Experience Cloud site's content and help your users find what they need with navigational topics. If your org uses data categories, community managers can link current Salesforce Knowledge articles associated with those categories to each navigational topic. If data categories aren't enabled, administrators can add articles to each topic using Connect REST API.

1. From Setup, enter *Topics for Objects* in the Quick Find box, then select **Topics for Objects**.
   a. In Classic Knowledge, enable topics for all the article types you want to include.
   b. In Lightning Knowledge, enable topics for Knowledge.

   Note: Enabling topics disables public tags on articles. Personal tags aren't affected.
2. Open Experience Workspaces.
3. In Experience Workspaces, access navigational topics by clicking **Content Management** > **Topics** > **Navigational Topics**.
4. In the text box at right, enter a topic name, and click **Add**. Want to add subtopics? After you add a topic, choose your topic from the dropdown menu (under Show subtopics of). To add a subtopic, add another topic and click **Add**. You can add up to two levels of subtopics for each parent topic.
5. If your org uses data categories, hover over the navigational topic name, and click . Select a Data Category Group, then select the categories you want to add to the topic, and click **Add Articles & Close Window**.

   Important: This process adds only current articles to a topic. To add new articles, return to Experience Workspaces and repeat the previous step.
6. Hover over a topic name, and click . Then click **Upload banner image** and select an image that appears across the top of the topic page.

   Banner images are scaled to 1400 x 180 pixels. To prevent distortion, create image files with those dimensions.

   To ensure guest users can see navigational topic images in your site, select Let guest users view asset files and CMS content available to the site in **Administration** > **Preferences** in Experience Workspaces. This selection also allows guest users to see images associated with recognition badges, site branding, and account branding.
7. Repeat steps 4–6 to create several navigational topics for your site. Then click **Save**.
8. Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization. This table shows the maximum number of navigational topics and subtopics you can create in the UI of a Customer Service site.

Level	Maximum Number of Entries
One (parent)	25
Two (subtopic)	10
Three (subtopic)	10

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management page:
- Manage Experiences

  AND

  Create and Set Up Experiences

  AND

  Is a member of the site

To set up navigational topics:
- Create Topics

  AND

  Edit Topics

To add articles to topics:
- View Data Categories

  AND

  Read on related article types

With Connect REST API or Connect in Apex, you can create an additional five levels, each with 10 subtopics, for a total of 2,775 navigational topics.

Tip: To edit navigational topics, hover over a topic name.

- To move a topic up or down, click the arrows at left.
- To rename or remove a topic, change its banner image, or remove assigned articles, click .

Set Up Content Topics

Content topics organize your original content around common themes for your Experience Cloud site.

1. Open Experience Workspaces.

   You can view and edit content topics in Experience Management, but you can't create content topics or enable topics for content in Experience Management.
2. Access topics by clicking **Content Management** > **Topics**.
3. Select **All Topics** > **All Content Topics**.
4. To create a content topic, click **New**.
5. Enter a name and description. Select **Enable for content**.
6. Repeat steps 4 and 5 to create several content topics for your Experience Cloud site, up to a maximum of 5,000.

   Alternatively, use the All Topics list and select up to 10 topics at a time and click **Enable for Content**.

After a topic is enabled for content, you can associate the topic with your native content.

To edit or delete a content topic, click in the topic row and select **Edit** or **Delete**.

EDITIONS

Available in: Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces page:

- Manage Experiences

  OR

  Create and Set Up Experiences

  AND

  Is a member of the site

To set up content topics:

- Create Topics

  AND

  Edit Topics

See Your Site's Topics and Subtopics in One Place

You've gone through the exhaustive task of adding topics and various levels of subtopics to your Experience Cloud site's content. Now you want your site members to see all the organized topics in one place, so they can navigate to any subject their hearts desire. Fear not! They can see everything in your site's topic catalog.

The topic catalog shows the hierarchy of navigational topics you've created for the Experience Cloud site. It's only visible after you set up navigational topics, and it's accessed from the navigation menu.

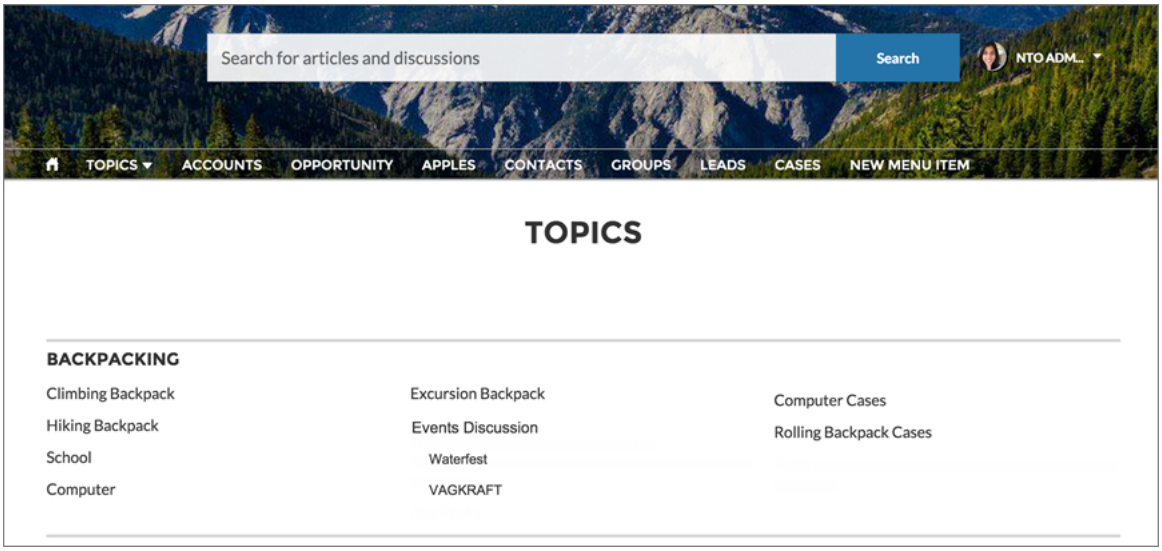
How is the topic catalog useful to your site members?

- New and returning users look at all the organized topics in one place, getting a lay of the land before diving deeper into a specific topic.
- Any site user can use the topic catalog as a jumping point to go from topic to topic.

To set up the topic catalog, select **Add the "More Topics..." link** when editing the navigation menu on the home page. The link appears when you have at least one subtopic.

You can also see an article or discussion's placement in the topic hierarchy using breadcrumbs. To show breadcrumbs on your site's pages, drag the Breadcrumb component to the page in Experience Builder.

Example:



Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as your Experience Cloud site's needs change.

1. In Experience Workspaces, access topics by clicking **Content Management** > **Topics** > **Article Management**.
2. Use the search bar to look for articles. Filter your search by selecting a data category group, followed by a specific category.
3. Select an article, and then type to assign topics. Choose a suggested topic or type a new one. Type a comma (,) after your new topic to add it to the article. You can click existing topics to remove them.

Considerations for adding and removing topics:

- To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.
- Topics are site specific and don't require an assigned Network ID. If you choose to assign a Network ID, which isn't recommended, make sure you assign the ID of the site where your topic exists.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management page:

- Manage Experiences

  OR

  Create and Set Up Experiences

To add or remove topics:

- Create Topics

Translate Topics Names and Descriptions for Experience Cloud Sites with International Audiences

Use the Translation Workbench to translate topic names and descriptions in international Experience Cloud sites.

1. From Setup, enter *Translate* in the Quick Find box, then select **Translate**.
2. Select the language you're translating into.
3. Select **Managed Topic** for the Setup Component.
4. For Aspect, select **Field Label** for the topic name, and **Description** for the topic description.
5. In the Experience Name column, expand a site to see its primary topic names.
6. To enter language-specific names for topics, double-click in the Topic Name Translation column. For descriptions, double-click in the Topic Description Translation column.

   Consider the following when you're using the Translation Workbench:

   - There's no Metadata API support for translated topic names or descriptions.
   - While topic name uniqueness is guaranteed in English, the translator must ensure the uniqueness of topic names in the translated language.
   - Modifying topic names from Experience Workspaces or Experience Management only changes the English site. All translated topic name and description changes must be made using the Translation Workbench.
   - If a translated topic name is entered when the site is in English mode, the translated name can appear twice in the translated site.
   - When topics names are translated with the Translation Workbench, hashtags in the translated sites also change. For example, #help shows as #aiuto in Italian. If the site member then reverts to English from Italian, clicking the #aiuto hashtag gives an error message rather than showing the topic detail page of #help.

Note: To automatically add the translated version of a topic to translated articles, the translated topics and articles must already be uploaded in the system. Otherwise, the translated article is tagged with the English topic.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To translate topics:

- View Setup and Configuration

  AND

  Be designated as a translator

Customize Recommendations in Experience Cloud Sites

Create recommendations to drive engagement for your Experience Cloud site, encouraging users to watch videos, take trainings, and more. Target specific audiences and use channels to specify locations for the recommendations.

Note: Recommendation audiences and personalization audiences are different features. For a more updated content targeting experience, we suggest using CMS collections and personalization audiences.

1. In Experience Workspaces, select **Content Management** > **Recommendations**.
2. Select **Default Channel** or one of the custom channels.

   A channel is a way to group recommendations together so you can determine where they show up in the site.

   Default Channel
   Recommendations in the default channel appear in predefined locations, such as the Home and Question Detail pages in Customer Service and Partner Central templates.

   Custom Channel
   You choose the pages where you want these recommendations to appear. In Experience Builder, add the Recommendations Carousel component to the page where you want the recommendation to appear. Use the property editor to specify the custom channel with the recommendation.

   Using a custom channel, you could surface a recommendation to review specific knowledge articles on a product description page to guide customers to more information.

   If you want to change the channel of a recommendation, delete the recommendation and recreate it in a different channel.
3. Click **New**.
4. Complete the following fields:
   - `Name`—Enter a name for the recommendation. This name doesn't appear in the site.
   - `Image`—Click **Upload Image** to include an image with your recommendation.
   - `Title`—Optionally, enter header text that appears above the image.
   - `Description`—Enter detailed text that suggests what users can do.
   - `Button text`—Enter a label for the button in the recommendation.
   - `https://`—Enter the URL that the button opens.

     The URL can contain context variables to pass information about the user who clicked the recommendation and the context in which it was clicked. For example, include a `{!userId}` context variable in your URL, `https://www.example.com/doSurvey?userId={!userId}`. When a user clicks the button in the recommendation, Salesforce sends the ID of that user to your server in the HTTP request.

     Recommendations support these context variables.

Context Variable	Description
`{!actionLinkId}`	The ID of the recommendation link that the user clicked.
`{!actionLinkGroupId}`	The ID of the recommendation link group containing the recommendation that the user clicked.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management:
- Manage Experiences

  OR

  Create and Set Up Experiences

Context Variable	Description
`{!communityId}`	The ID of the site in which the user clicked the recommendation. The value for your internal Salesforce org is the empty key, `"000000000000000000"`.
`{!orgId}`	The ID of the org in which the user clicked the recommendation.
`{!userId}`	The ID of the user that clicked the recommendation.

- `Audience`—Select an audience for the recommendation. If you don't select an audience, all members of the site see the recommendation.

  Tip: To create an audience that appears in this dropdown list, in Experience Workspaces, select **Content Management** > **Recommendations** > **Audiences**. Click **New**.

- `Enabled`—If checked, this recommendation is active and appears in sites.

  The Recommendations Carousel displays your custom recommendations and also displays system-generated topic recommendations for your site.

  After a site member clicks or dismisses a recommendation, it no longer appears for that member.

5. Click **Save**.
   So that users don't see the same recommendations all the time, Salesforce periodically removes and brings back custom recommendations that haven't been accepted or dismissed.

Tip: To remove a recommendation, click the recommendation name. At the bottom of the recommendation details, click **Delete**.

Create Audiences for Your Recommendations

Create audiences of new members or use the API to manage customized lists of audience members for your custom recommendations.

Note: Recommendation audiences and personalization audiences are different features. For a more updated content targeting experience, we suggest using CMS collections and personalization audiences.

1. In Experience Workspaces, select **Content Management** > **Recommendations** > **Audiences**.
2. Click **New**.
3. Complete the following fields.
   - `Name`—Enter a name for the audience.
   - `Audience Type`
     - Select **New Members** to create an audience based on how long users have been site members.

       Enter the number of days since registration for audience members.
     - Select **Custom List** to create an audience based on any criteria you want.

       Note: You can't manage audience membership for custom lists through the UI. Add and remove members through the API.
4. Click **Save**.

Audiences you create appear in the Audience drop-down list when you create a recommendation.

Tip: To remove an audience, click the audience name. At the bottom of the audience details, click **Delete**. If you remove an audience that is associated with a recommendation, the recommendation is disabled and the audience is set to the default (All site members).

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To access Experience Workspaces or Experience Management:

- Manage Experiences

  OR

  Create and Set Up Experiences

Gamification

Use gamification tools, like Recognition Badges and Reputation, to keep your members engaged in your site.

Recognition Badges

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

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

Note: Badges can only be assigned to users and by users who have Chatter enabled.

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 site.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Recognition Badges Limitations

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

EDITIONS

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

- Chatter must be enabled for your site.
- It's currently not possible for users with a Customer Community or Customer Community Login license to assign a private badge. Only internal users or users with the following licenses, and with the **Assign Recognition Badges in Experience Builder Sites** permission, can assign a private badge:
  - Customer Community Plus
  - Customer Community Plus Login
  - Partner Community
  - Partner Community Login
- Users with the following licenses can see the badges that they've received, but **not** assign badges:
  - Customer Portal User
  - High Volume Customer Portal
  - Internal Portal User
  - 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 aren't enforced for badges comments. To help prevent unwanted keywords from appearing in your site, add your list of words to "block" or "replace" rules.
- Past activity, such as comments or likes, isn't counted when you create a mission.

Recognition Badges Setup

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

EDITIONS

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

Enable WDC Thanks

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

EDITIONS

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

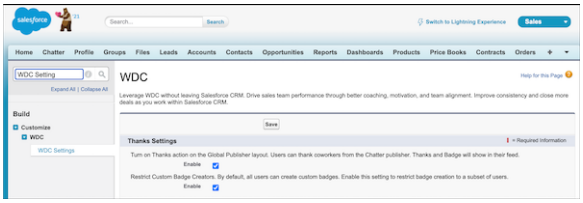
USER PERMISSIONS

To set up the Thanks feature:
- Customize Application

Note: You don't need an extra WDC license to set up the Thanks feature.

1. In Classic, from Setup, enter *WDC Settings* in the **Quick Find** box.
2. Select **WDC 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.

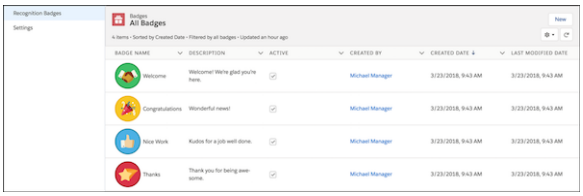


Turn On Recognition Badges in Experience Workspaces

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

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

1. In Experience 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**.



EDITIONS

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

USER PERMISSIONS

To turn on or off Recognition Badges:

- Create and Set Up Experiences

  AND

  Moderate Chatter

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 site 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 Assign Recognition Badges

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

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"

Note: It's currently not possible for users with a Customer Community or Customer Community Login license to assign a private badge. Only internal users or users with the following licenses, and with the **Assign Recognition Badges in Experience Builder Sites** permission, can assign a private badge:

- Customer Community Plus
- Customer Community Plus Login
- Partner Community
- Partner Community Login

Note: Buttons for assigning 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 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 "Assign Recognition Badges in Experience Builder Sites."
4. Click **System Permissions** and then click **Edit**.
5. To add the permissions for assigning a badge, select **Assign Recognition Badges in Experience Builder Sites** permission.
6. Select **Manage Assignments** and add those users you want to let assign badges.

Use Components to Display Assigned Recognition Badges on Member Profiles

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

EDITIONS

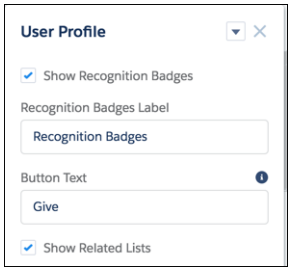
Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

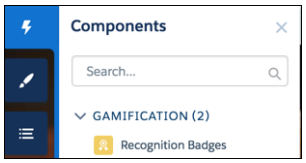
To manage page components:
- Create And Set Up Experiences

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.



Create, Edit, and Delete Recognition Badges

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

1. To create a badge, in Experience 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**. If you want the badge to be available for a mission, select **Mission Badge**.

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 Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

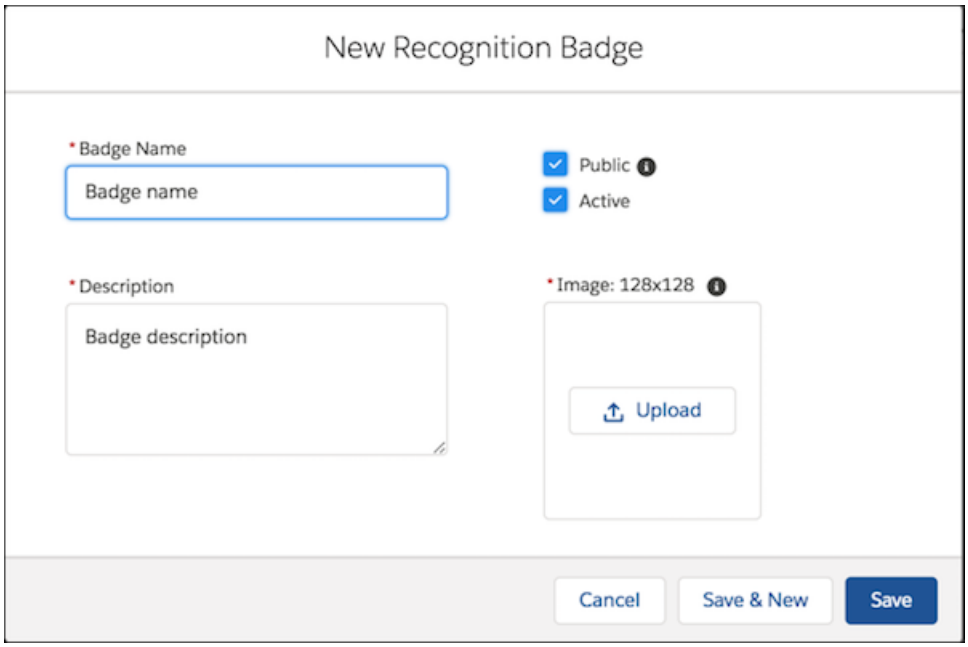
  Moderate Chatter

To manage badges owned by someone else:

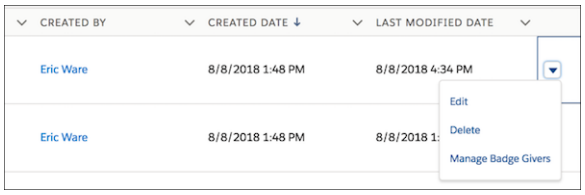
- Modify All Data

  AND

  Moderate Chatter



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



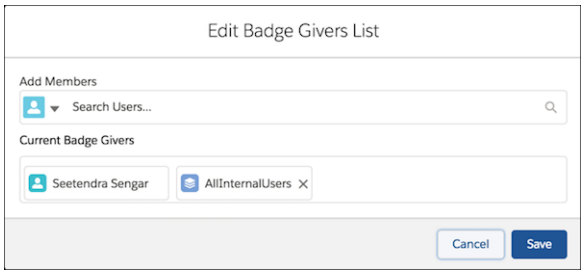
5. To delete a badge, go to the badge related list, click the dropdown at the end of the badge's row, and click **Delete**.

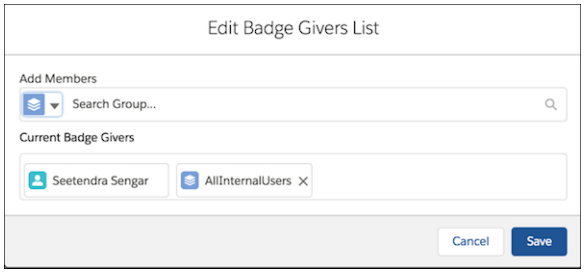
Manage Who Can Assign a Specific Recognition Badge

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

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

1. In Experience 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 window, search to add the users or public groups you want to have permission to assign badges.





Note: Only those users with the Assign Recognition Badges in Experience Builder Sites permission are available. You can remove members from the list by clicking the X by their name.

4. 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 Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

  Moderate Chatter

To manage badges created by someone else:

- Modify All Data

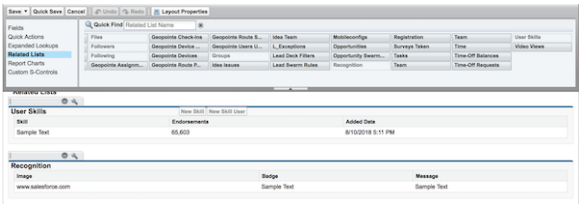
  AND

  Moderate Chatter

Display the Full List of Assigned Recognition Badges on a Member's Profile Page

Edit the user profile layout to display the full list of assigned 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.



EDITIONS

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

USER PERMISSIONS

To update the user profile layout:

- Customize Application

4. Click **Save**.
5. Each site's guest users have a discrete user profile. To find out which user profile layout to update, go to Experience Builder in the site you're working on.
6. Click **Settings** and select the link to the guest user profile.
7. Repeat steps 1–4 for that user profile layout.

Missions

Game mechanics, such as using badges, are a great way to get your users involved in your Experience Cloud site. However, assigning badges manually can be time consuming. Instead, use the Missions feature to assign members badges automatically. Community managers have their say in what action earns a badge and when it can be awarded, and then Missions takes care of the rest. And members can see which badges they haven't yet earned, inspiring action.

EDITIONS

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

Community managers create missions and choose the badge, the action, and the threshold. For example, a mission could assign the Nice Work badge when a member answers 10 questions. Actions you can choose from include writing a post or comment, receiving a like, and more. Members can earn each mission badge once.

Note: Badges can only be assigned to users and by users who have Chatter enabled.

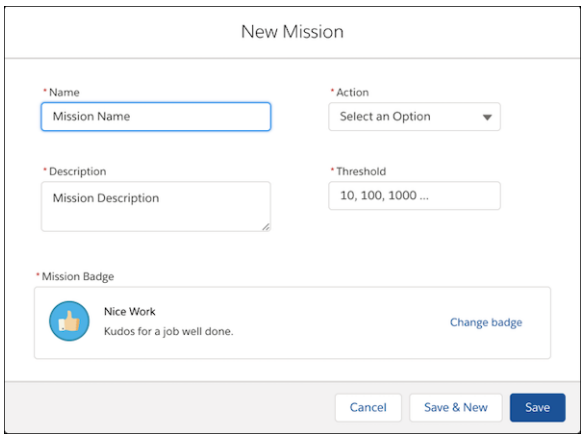
Create a Mission

Create a mission, choosing an action, threshold, and badge, to automatically give badges to your members.

Note:

- To use Missions, set up Recognition Badges.
- Members only receive a mission badge once. If a member received the badge before a mission was set up, they won't receive it again.
- Missions count activities that occurred before the missions were set up. When you set up missions for the first time, click **Reset Activity Count** to restart the count for all activities. Be careful about resetting the counts after you have missions established, though, as the reset will erase all of your members' progress toward earning badges.

1. In Experience Workspaces, click the Gamification tile and go to the Missions section.
2. Click **New**.
3. Give the mission a name and a description.



4. Select the action that the member performs.
5. Enter the threshold, which sets the total number of actions a member must repeat to earn the badge. The threshold doesn't repeat and badges are earned once. For example, if you set the threshold to 10, the member will receive the badge after completing the 10th action, but not the 20th.
6. Choose your preferred badge and save your changes.

Tip: To make a badge available for missions, in the Recognition Badges section, create or edit a badge and select **Mission Badge**.

As a best practice, use the badge's name and description to explain how the user can earn it.

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 Experiences

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

  Moderate Chatter

To manage badges created by someone else:

- Modify All Data

  AND

  Moderate Chatter

Display Unearned Mission Badges

Inspire members to participate more in your Experience Cloud site by showing them the badges they can earn. You can display the unearned badges in the member's recognition badges list.

EDITIONS

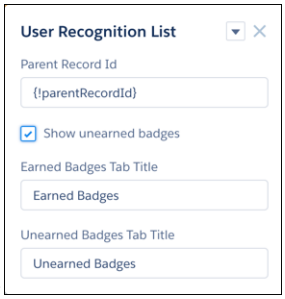
Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

User Permissions Needed	
To edit page components:	Create and Set Up Experiences AND View Setup and Configuration

Note:

- To use Missions, set up Recognition Badges.
- Missions count activities that occurred before the missions were set up. You can reset the count when you create your mission, but be aware that this resets all the activity counters.

1. In Experience Builder, open the Badge Received Related List page.
2. Click the User Recognition List component.
3. Select **Show unearned badges**.



Assign Recognition Badges to Experience Cloud Site Members

Assigning badges to members helps reward them for staying engaged in the Experience Cloud site.

EDITIONS

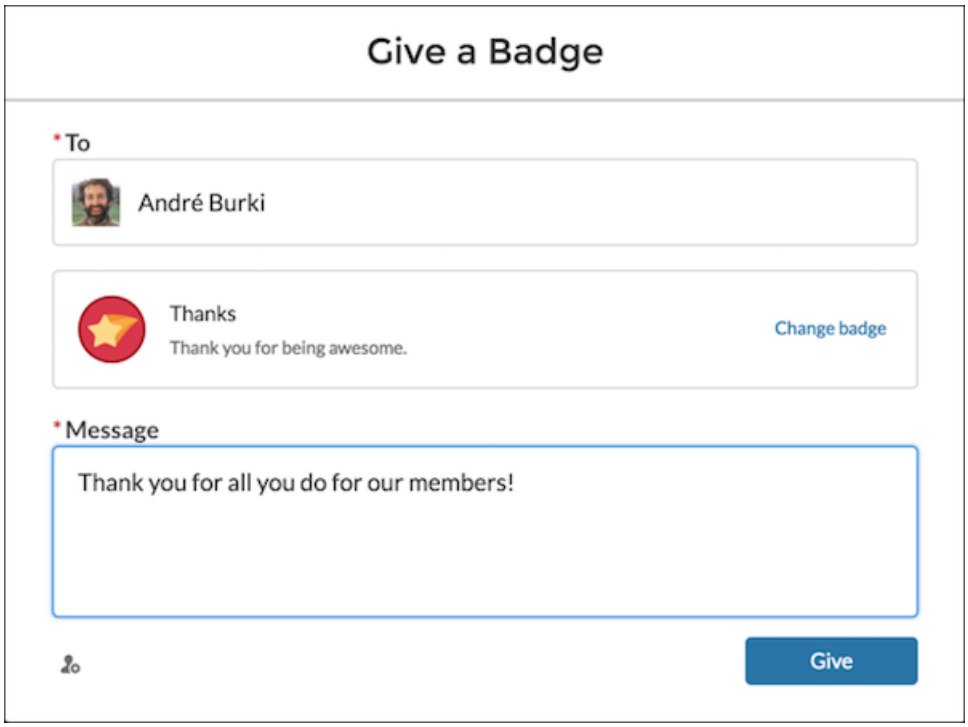
Available in: **Enterprise**, **Professional**, **Unlimited**, and **Developer** editions.

USER PERMISSIONS

To assign recognition badges:

- Assign Recognition Badges in Experience Builder Sites

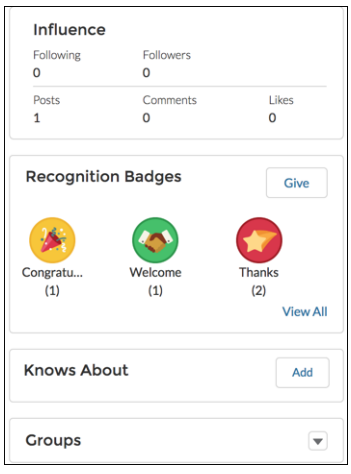
1. Open the member's profile page.
2. Click either the **Give Badge** button at the top of the profile or the **Give** button on the Recognition Badges card.
3. Choose which badge you want to assign by clicking **Change badge**.
4. Add a message letting the member know why they're getting the badge,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

  AND

  Moderate Chatter

  OR

  Manage Experiences

  AND

  Moderate Chatter

Use the API to Give Recognition Badges Sample Code

You can use the API to programmatically give recognition badges to Experience Cloud site 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 site';

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 WDC 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.ReputationPonts >= 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
      }
   }
}
```

Reputation Overview

Your reputation in the Experience Cloud site directly corresponds to how active you are. The more you post, comment, and share, the higher your reputation level will be.

Your reputation level appears on your profile page and when any user hovers over your name. It's visible to other members so that they know how influential you are. When you start out, you are at the lowest level. As you become more active, you gain points and your reputation level increases. Increases in reputation levels are posted to your feed. In other words, as people see you participating and sharing your knowledge, your credibility and influence grows.

These are the default actions that increase your reputation level.

- Posting
- Commenting
- Liking a post or comment
- Sharing a post
- People sharing your posts
- People commenting on your posts
- People liking your posts or comments
- Mentioning someone
- Being mentioned
- Asking a question
- Answering a question
- Receiving an answer
- Marking an answer as best
- People marking your answer as best
- Endorsing someone for knowledge on a topic
- Being endorsed for knowledge on a topic

Your administrator defines the activities that help you gain points. They also set the number of points for each action.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Enable Reputation in Your Experience Cloud Site

Enable reputation so that site members are recognized and rewarded for participating.

Set Up Reputation Levels

Update the default reputation levels to meet your Experience Cloud site's needs and help motivate your members.

Set Up Reputation Points

Set up a point system to reward users for participating in the Experience Cloud site.

How is my Experience Cloud site reputation calculated?

The reputation level on your profile is calculated based on your total points.

Enable Reputation in Your Experience Cloud Site

Enable reputation so that site members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation. Community managers know that recognition and a little friendly competition usually lead to more active members. Enabling reputation turns on a default point system and a set of reputation levels in the Experience Cloud site. A community manager can personalize labels and point values.

Members start to accrue points by performing the actions that have assigned point values. When the member exceeds the top of the level's point threshold, they move up a level. They, and other members, see their reputation level on their profile and when hovering over their name. Total points also show on member's profiles.

Note: When you enable Reputation, Chatter influence is removed from the Contribution section on the profile page.

1. Open Experience Workspaces.
2. Click **Administration** > **Preferences**.
3. Select **Enable setup and display of reputation levels**, then click **Save**.

After you enable reputation, a default point system and set of reputation levels is available. The default reputation points are as follows:

Action	Points
Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To edit settings:

- Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

Action	Points
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

If your selected Experience Cloud site doesn't have Chatter enabled, the Reputation section doesn't appear. To show the Reputation section, go to **Administration** > **Preferences** and select **Show all settings in Workspaces**.

Set Up Reputation Levels

Update the default reputation levels to meet your Experience Cloud site's needs and help motivate your members.

When reputation is enabled, 10 default levels are added. You can add or remove levels, give each level a name, and update the point range and image for each level.

Note: An Experience Cloud site must have at least three reputation levels and can have up to 50.

1. Open Experience Workspaces.
2. Click **Administration** > **Reputation Levels**.

   From here you can:

   - Upload your own image for each reputation level. To upload a new image, click the default image and browse to an image file.

     Note: You can't revert to the default reputation level images from the Salesforce user interface. Instead, use Connect REST API.

   - Give each level a name, such as "Beginner," "Intermediate," and "Expert." If you don't assign a name, the default is used. For example, "Level 1," "Level 2," "Level 3."
   - Edit the point range for a level.

     When you update the higher value of a level's point range, the lower value for the next level is automatically adjusted when you save.

   - Add more levels by clicking **Add a level**, located underneath the list of levels.
   - Remove a level by clicking ⊗ next to the level.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To update reputation levels:

- Manage Experiences

  AND

  Is a member of the Experience Cloud site

3. Click **Save**.

You can now update the point system for the site. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions through comments, likes, and shares. Reputation level increases are posted to member feeds.

You can translate reputation level names so that international members can view their reputation levels in the appropriate language. In Translation Workbench, select the `Reputation Level` setup component and then expand the node next to your site.

Set Up Reputation Points

Set up a point system to reward users for participating in the Experience Cloud site.

When reputation is enabled, there is a default point system setup. When users perform the actions with assigned point values, their total points increase and they start to move towards the next reputation level.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user gets no points.

The table shows the default events and points.

Action	Points
Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To update reputation points:

- Manage Experiences

  AND

  Is a member of the Experience Cloud site

Action	Points
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Questions and answers in the feed are not to be confused with the Chatter Answers functionality.

Note: In orgs with reputation enabled before the Winter '15 release, actions associated with questions and answers are available at the time of the release. Their default point values are set to 0. The release doesn't affect existing user reputation points, and users don't accrue points from these actions until you configure point values for them.

1. Open Experience Workspaces.
2. Click **Administration** > **Reputation Points**.
3. Update the points for each action. If you don't want users to accrue points for a certain action, set the Points to *0*.
4. Click **Save**.

Point totals show up on profile pages beneath the photo. Point totals are visible to anyone in the Experience Cloud site.

Tip: You can directly update reputation points for a member via the Salesforce API. You can also use Apex triggers to send custom notifications based on changes to reputation points.

How is my Experience Cloud site reputation calculated?

The reputation level on your profile is calculated based on your total points.

Points are accrued when you perform activities that your community manager has assigned point values. You could also potentially gain points if your posts or comments draw reaction from other members. For example, your community manager may have decided that writing a post earns you 5 points. If someone else shares your post, your community manager may decide that you should earn 10 points because your post is influencing others to contribute.

Note: Only active users accrue points. For example, if an active user likes the post of an inactive user, the active user gets 1 point, but the inactive user gets no points.

Default point values are as follows. Keep in mind that your community manager may have customized these values. For more information, contact your community manager.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

Action	Points
Engagement	
Write a post	1
Write a comment	1
Receive a comment	5
Like something	1
Receive a like	5
Share a post	1
Someone shares your post	5

Action	Points
Mention someone	1 If your post contains more than one @mention, you get a point for each @mention.
Receive a mention	5
Questions and Answers	
Ask a question	1
Answer a question	5
Receive an answer	5
Mark an answer as best	5
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

Experience Cloud Site Administration

Customize your Experience Cloud site's properties, such as name, description, URL, status, and template, in the Administration section of Experience Workspaces. You can also update your site settings, such as members, tabs, branding, login and registration, and emails.

Limit Files in Your Experience Cloud Site

Restrict the size and types of files that your members can upload. This list of file types lets you control what your members upload and also prevents spammers from polluting your Experience Cloud site with inappropriate files.

File moderation must be enabled for your org before you can limit files in your Experience Cloud site. If you don't see the option to limit files in Experience Workspaces, contact Salesforce.

Your file limits apply to files uploaded by members anywhere in the site—in posts and comments, directly in the Files tab, and from the Salesforce mobile app. You can also set file limits using SOAP or Metadata API.

Files uploaded before setting your file limits are unaffected. However, newer versions of those files must meet the limits you specify.

Keep the following things in mind:

- A file must meet the file limits set in the Experience Cloud site in which it's uploaded. For example, if a customer uploads a file on a case and then an agent uploads a newer version in your Salesforce internal org, the limits from the customer site still apply.
- Files uploaded in your internal Salesforce org that are shared in a site aren't subject to site file limits.

1. Open Experience Workspaces.
2. Select **Administration** > **Preferences**, then enter your limits in the Files section on the page.
   a. `Maximum file size in MB`—Enter a number between 3 MB and your org's maximum file size. To use the default limit of 2 GB, leave this field empty or enter *0*.
   b. `Allow only these file types`—Enter file extensions separated with a comma (for example: *jpg,docx,txt*). You can enter lowercase and uppercase letters. You can enter up to 1,000 characters. To allow all file types, leave this field empty.
3. Click **Save**.

After you set your file limits, members receive an error message if their file is larger than the size you set or if their file extension isn't allowed.

When a member tries to upload multiple files at once and a file is found that doesn't meet your limits, none of the files are uploaded.

Note: By default, guest user files are blocked from being uploaded. After developer customizations (Lightning pages, for instance) have been created, admins can change the settings to let guest users upload files. To enable, go to Setup and in **Salesforce Files** > **General Settings** select Allow site guest users to upload files.

Note: Files uploaded by guest users are unassigned. Unassigned files are public by default. We recommend setting up a trigger to assign an owner to files uploaded by guest users. You may also wish to restrict file upload size or type using file moderation.

EDITIONS

Available in: both Salesforce Classic (not available in all orgs) and Lightning Experience

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

USER PERMISSIONS

To limit files:

- Manage Experiences OR Create and Set Up Experiences

  AND

  Is a member of the Experience Cloud site

RESOURCES FOR COMMUNITY MANAGERS

When you're managing an Experience Cloud site, every extra bit of information helps. Use these resources to assist you with your daily site management duties.

success.salesforce.com

Have a question about Experience Cloud? Have a great idea about managing Experience Cloud sites that Salesforce should implement? Know a lot about Experience Cloud sites and want to help others? Visit the Salesforce Trailblazer Community and start collaborating with other Experience Cloud users just like you! From the Salesforce Trailblazer Community you can ask questions and get answers, post ideas, view help and training offerings, collaborate with other Salesforce users and more.

Engaging Your Customer (or Partner) Community

Contains strategies and tips on how to grow engagement in your Experience Cloud site.

5 Steps to Communities that Thrive

Contains details about how to create a successful Experience Cloud site, including the story of how the Trailblazer Community was built.

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