Salesforce Communities Managers Guide

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CONTENTS

Contents

MANAGE YOUR COMMUNITIES FOR SUCCESS

Monitoring and managing your community is the key to ensuring the community is a success.

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

Great communities don't just happen; there are many people involved, from the designer to the implementer to the developer who performs customizations. But once a community 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 community 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.

COMMUNITY MANAGERS AND MODERATORS WORKING IN SYNC

What Are Community Managers and Moderators?

Communities can thrive when community managers and moderators understand their unique roles and work together effectively.

A community manager and moderator should work hand-in-hand. They are partners and should support one another in fostering engagement and harmony in the community. They may perform some of the same tasks, but each has unique contributions. While the community manager is typically responsible for setting up the community and monitoring community engagement, the moderator is typically responsible for ensuring the community is a healthy environment and that members feel encouraged to be active and helpful to each other.

It's important to keep in mind that your community manager must be an employee of your organization, since they are dealing with setup, reports, and other sensitive data. Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management. External users who are moderators can moderate within context of the community, such as directly in the Chatter feed.

Task	Community Manager	Community Moderator
Engage members by starting discussions in the community	✔	✔
Access Community Management	✔	✔ (Internal users only, with the necessary permission)
Set up reputation levels and point system	✔	
Review and act on flagged items		✔

Assign a Community Manager

To assign a user as a community manager, simply give them the "Manage Communities" permission.

When you assign the "Manage Communities" permission to a user, they get access to all the community management features in the Community Management. Keep in mind that the user must be an employee of your organization; external users can't be community managers.

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 "Manage Communities" permissions.
3. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
4. Find the user you want to be a community manager and add the permission set to their Permission Set Assignments related list.

The user can now manage the community through Community Management.

Assign a Community Moderator

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

Moderators can be users from your internal organization or external users, but only internal users can moderate from within Community Management. External users who are moderators can moderate within context of the community, such as directly in the Chatter feed.

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

Permission	Allows Users To
Moderate Communities 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 community feed and in Community Management.
Moderate Communities 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 Community Management.
Moderate Communities Chatter Messages	Receive email notifications when private messages are flagged.
Manage Chatter Messages	View the contents of private messages.
Manage Communities OR Create and Set Up Communities	Moderate flagged posts and files from Community Management.

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

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 community moderator and add the permission set to their Permission Set Assignments related list.

Once you grant moderator permissions to a user, they can help curate flagged content in the community.

- The user can now moderate any items they have access to in all communities they're a member of. The user can flag items even if `Allow members to flag content` is disabled in a community.

- When `Allow members to flag content` is enabled for a community, group owners and managers can moderate posts, comments, and files in groups that they own or manage. They can view flags and flag counts, remove flags, and delete content.

- Moderators can receive an email notification when a post, comment, or file is flagged by selecting the `Flag an item as inappropriate` email notification.

Access to moderator functionality is slightly different depending on user permissions:

- **In the community feed**: Both internal and external users with the "Moderate Communities Feeds" permission can view flag indicators directly in the community feed for posts and comments and decide to either remove the flags or delete the content.

- **In Community Management**: Only internal users with the "Manage Communities" or "Create and Set Up Communities" permission can access the **Moderation** area in Community Management. The "Moderate Communities Feeds" permission grants users access to the **Flagged Posts** page and the "Moderate Communities Files" permission grants users access to the **Flagged Files** page.

ONE-STOP MONITORING USING COMMUNITY MANAGEMENT

Community Management Overview

Community Management is a central place for setting up and managing your community. You can manage basic setup information including membership and branding, dashboards, reputation levels and points, and topics.

Community Management gives community administrators, managers, and moderators a central place to monitor the health of their community and its members.

Important: The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration** > **Preferences** and enable **Show all settings in Community Management**.

Access the Community Management Page

USER PERMISSIONS

To access Community Management:	• "Manage Communities" OR "Create and Set Up Communities" • AND is a member of the community whose Community Management page they're trying to access
To customize administration settings or use Community Builder:	• "Create and Set Up Communities" • AND is a member of the community whose Community Management page they're trying to access

Community administrators and managers use Community Management to monitor community activity, and set up other important management features.

To access the Community Management page, you must be logged in to the community.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Choose the part of the community you want to manage:

   • Preview the community or access your community's settings in the Community Builder, Force.com, or Site.com Studio from the Community Management menu in the global header.
   • In **Insights**, you can view Insights reports and take action on activity in your community.
   • In **Dashboards**, you can view community dashboards and reports.
   • In **Moderation**, you can set up moderation rules and monitor flagged feed items.
   • In **Topics**, you can manage navigational and featured topics.

- In **Recommendations**, you can set up custom recommendations to appear in your community.
- In **Reputation**, you can set up reputation levels and points.
- In **Administration**, you can customize your community properties, such as name, description, URL, status, and template. You can also update your community settings, such as members, tabs, branding, login and registration, and emails.

⊘ Important: The options available in Community Management are based on your community template selection, permissions, and preferences. For example, if your community does not use topics, you will not see the Topics node. Some of the options in the following list may not be applicable in your community. To display all nodes, go to **Administration** > **Preferences** and enable **Show all settings in Community Management**.

Get Started with Communities Dashboards and Insights

Dashboards in Community Management provide essential reports for managing your communities. Insights help you drill down to the source of activity and take action.

Let us do the hard work for you!

1. Install the Salesforce Communities Management package and get preconfigured dashboards and Insights.

2. Check out your new mapped pages. Click **Dashboards** and **Insights** in Community Management.

   Don't be afraid to customize the preconfigured dashboards and Insights to fit your community's needs. You can edit the source reports or dashboards at any time.

Alternatively, create your own dashboards and Insights.

1. Create custom dashboards and custom Insights.

2. Map those dashboards and Insights in Community Management.

Report on Communities with the Dashboards and Insights Package

The Salesforce Communities Management package gives community managers an essential starter set of dashboards and reports to keep tabs on activity and engagement directly in Community Management.

Use the Salesforce Communities Management package to:

- View the latest metrics and rapidly spot trends
- Determine how fast your community is growing
- Find out who your most engaged members are
- Discover which discussions people and groups are most excited about
- Identify areas in your community that need attention
- Drill down to the source of activity and take action with Insights reports

📝 Note: To use the preconfigured Insights reports, your community must use Chatter.

Install one of the following versions from the AppExchange:

- Salesforce Communities Management (for Communities with Chatter)
- Salesforce Communities Management (for Communities without Chatter)

💡 Tip: For installation instructions, detailed information about the reports, and upgrade instructions, see *Get Started with the Communities Management AppExchange Package*.

During installation, dashboard and report folders are automatically installed in your internal organization. You'll 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 Community Management, they are automatically mapped for you during installation.

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 Community Management, community-specific data is displayed. The dashboards and reports provided in the package are 100% customizable. Don't be afraid to customize and change what you get in the package. You won't hurt our feelings.

As newer versions of the package become available, you can upgrade your package by reinstalling it. If you customized any of the reports and dashboards, fear not; your customizations are retained during upgrade.

| Navigation Node	Page Name	Description	Requires Chatter
Dashboards	Home	Stay informed about recent activity or membership. This dashboard is mapped to your Community Management home page.	
	Overview	See the overall state of your communities at a glance. 90-day trending reports show total membership, newly joined members, and member logins. If you have Chatter enabled, 90-day snapshots show post and comment metrics.	
	Activity	See metrics about posts, comments, daily unique contributors, and which types of members are contributing posts and comments.	✔
	Custom Recommendations	See how your community's custom recommendations are doing and how often the recommendations are viewed, clicked, or dismissed. You can view data for individual recommendations or across channels.	✔
	Files	Track content uploads, downloads, engagement, and content creators.	✔
	Groups	Monitor membership and post and comment activity within groups, one of the top drivers of community success.	✔
	Members	Gauge membership growth and see login metrics for the last 30 days.	
	Moderation	Track flagged content in your community.	✔
	Q & A	Review metrics about questions, answers, and best answers posted in your groups.	✔
	Self-Service	See metrics about questions, answers, and best answers posted in your user profiles. This dashboard is great for communities using the Napili template.	✔
	Topics	See metrics about the navigational and featured topics in your community.	✔
Insights	Adoption	Monitor member activity and help drive adoption in your community.	✔
	Engagement	Track posts and comments in groups and see which members are truly engaged in your community.	✔
	Files	Monitor file uploads and downloads, including files receiving a lot of comments.	✔
	Groups	Helps you identify groups with deactivated or inactive owners and also groups that have been or will be archived soon.	✔

Navigation Node	Page Name	Description	Requires Chatter
	Moderation	Track flagged posts, files, messages, and content flagged by moderation rules in your community.	✔
	Self-Service	Track questions and answers in user profiles, including questions escalated to cases. This Insights page is great for communities using the Napili template.	✔
	Topics	Keep an eye on recent topic activity in your community.	✔

In addition to tracking Chatter usage in your community, you can track Chatter usage in your internal organization. There are specific Chatter dashboards that report *only* on your internal organization's Chatter usage. You can find these dashboards and reports under the **Chatter Dashboards** and **Chatter Reports** folders.

Confused about the difference between Insights and Dashboards?

Use **Insights** to view, monitor, and act on your community's activity. Insights give you a super-focused look at a specific area of your community.

Use **Dashboards** to view your community's analytics, such as metrics and trends on activity. Dashboards give you mid-term to long-term views on adoption and engagement in your community. They help you monitor return on investment (ROI) and key performance indicators (KPI).
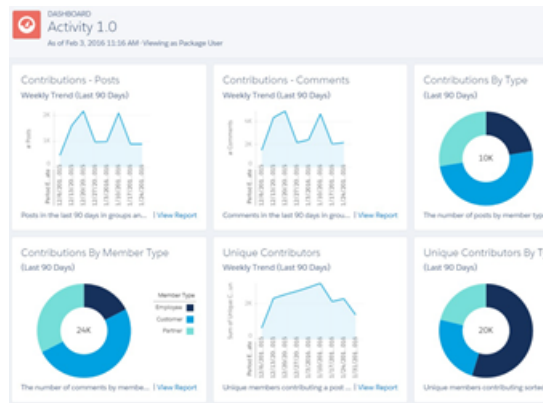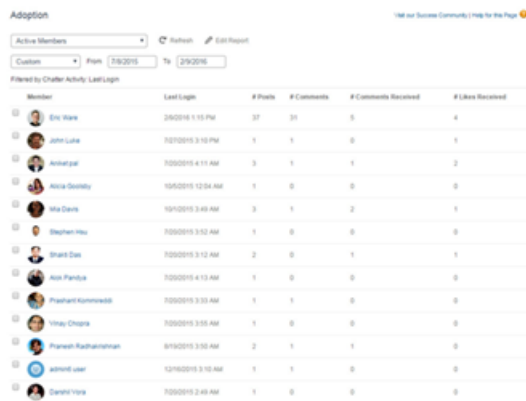
You can visit the **Insights** > **Adoption** page to view a report about new members in your community that have received the most likes on their posts and comments. This Insights report helps you identify and engage with your active new members that are receiving positive feedback from other community members.

You can visit the **Dashboards** > **Activity** page to track total posts and comments including overall contribution trends in your community.
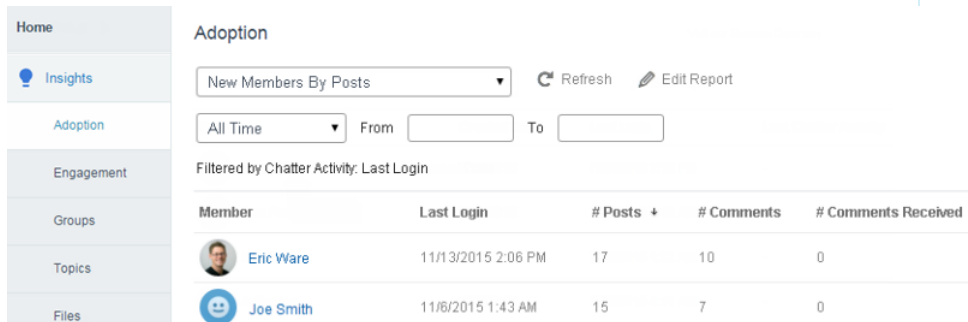
What are Insights?

Insights are reports that help your community managers monitor activity and drill down to that activity to take further action. Insights make it easier to encourage community engagement and drive member adoption. You can set up Insights to monitor new members, unanswered questions, newly created groups, trending topics, and even recent Chatter contributions.

👁 **Example:** With an Insights report set up to track new members, community managers can quickly navigate to a new member's profile to send them a welcome message.
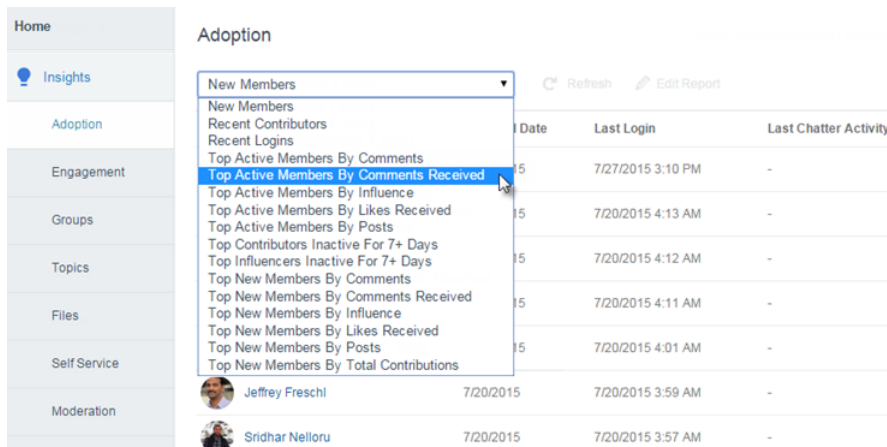
They can also access other reports about members directly from the Insights page using the drop-down menu.

📝 **Note:** Let us do the setup work for you! Get out-of-the-box Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter.

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 and Map Insights for Community Managers

Community managers can use Insights to monitor recent activity and drill down to the source of that activity to take further action. To get up and running quickly, use preconfigured Insights from an AppExchange package. You can also create and map your own. Each community can have their own Insights.

Insights pages map to report folders in your internal organization. All the reports included in that folder are displayed in the drop-down menu on the Insights page. Adding or removing an Insights report from the report folder in your internal organization updates the Insights page in Community Management. On the Insights page, entity links are automatically created for report fields such as `Created By` or `Group Name`.

> 💡 **Tip:** Get out-of-the-box Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter. When you install the package, report folders are automatically installed in your internal organization. If you have no previous Insights mapped, the package automatically maps them for you. You can change the default mapping at any time.

Use the following steps to map or update your Insights in Community Management:

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Insights** > **Settings**.

3. Provide a name for each Insights page and then select the report folder you want to map to the page.

   You can have up to 10 Insights pages mapped in Community Management.

   Make sure that you have shared the mapped report folder with your community managers or they won't be able to view the Insights reports.

4. Click **Save**.

   Insights pages are visible to community managers when they expand the **Insights** section of Community Management.

Go check out your changes. Click **Insights** and then click each Insights page name. Use the drop-down menu to verify the reports mapped to each page.

View and Customize Insights in Community Management

Use Insights in Community Management to monitor recent activity and drill down to the source of that activity to take further action. Insights help you nurture and encourage engagement and adoption within your community.

On the Insights page, entity links are automatically created for report fields such as `Created By` or `Group Name`. This link makes it easy for you to drill down to the source of activity and take action.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Insights**.

   📝 Note: Your administrator maps Insights pages. If the **Insights** section isn't visible, they haven't been mapped for your community.

   Pages with mapped report folders appear when you expand the **Insights** section.

3. Click the **Insights** page you want to view.

4. Filter and sort the Insights report.

   You can filter your Insights report by relative and custom date ranges. Use the drop-down date filter to select one of the following relative date ranges: All Time, This Week, This Month, Last Month, Today, Yesterday, Last 7 Days, and Last 30 Days. You can also enter your own custom date range.

   To sort the report by a specific column, click the column heading. An arrow on the column indicates whether the report is sorted by ascending or descending order.

5. To access other Insights reports, click ▾ next to the report name.

6. Click **Edit Report** to customize an Insights report to fit your community needs. You can add or remove columns and update the report filters.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

Insights reports in Community Management are automatically refreshed when you access them. You can also click **Refresh** to force an update.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To view Insights in Community Management:
- "Manage Communities" OR "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access

To customize Insights reports:
- "Create and Customize Reports"

Create Insights to Display in Community Management

You can create your own Insights to display in Community Management. We recommend that you create your Insights reports based on custom report types available for communities.

> 💡 **Tip:** Get out-of-the-box Insights in the Salesforce Communities Management package available for download from the AppExchange. To use the preconfigured Insights reports, your community must use Chatter.

Use the following process to create Insights to display in Community Management:

1. Create custom report types based on the Networks object.

   Reports based on the Networks object show community-specific information in Community Management.

   > 📝 **Note:** You can create reports based on other objects and expose them in Community Management. Just keep in mind that they will show data from across your organization, not just for the community in which you're viewing the report.

   - Select Networks as the primary object.
   - Select a child object:
     - Chatter Messages
     - Feed Revisions
     - Groups
     - Network Audits
     - Network Activity Daily Metrics
     - Network Members
     - Network Membership Daily Metrics
     - Network Moderations
     - Network Public Usage Daily Metrics
     - Network Unique Contributor Daily Metrics
     - Recommendation Metric
     - Topic Assignments
     - Topics

2. Use the custom report type to create an Insights report.

   Insights reports are just like any other report, except they must also meet the following requirements:

   - The report can only be a tabular-based report.
   - The report can't include pagination.
   - We recommended that your report only return 2,000 rows or less because only the first 2,000 rows are displayed in Community Management.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

3. Save the report to a new report folder that you'll use for mapping.

We recommend that you create a separate report folder for each of your Insights pages. For example, create one report folder called `Insights Members` and another called `Insights Moderation`.

Insights pages map to report folders in your internal organization. All the reports included in that folder are displayed in the drop-down menu on the Insights page. Adding or removing an Insights report from the report folder in your internal organization updates the Insights page in Community Management.

4. Share your Insights report folder with your community managers.

5. In Community Management, click **Insights** > **Settings** to map Insights pages.

When a community manager accesses Community Management, the Insights reports appear in the drop-down menu on the mapped **Insights** page.

Map Dashboards in Community Management

Community managers can use dashboards to measure the success of their communities. Dashboards provide information on membership, logins, and activity.

You can choose to map any dashboard you have access to, but ensure that your community managers have access as well.

All dashboards in Community Management display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard in Community Management. Remember that although dashboards render in a Lightning view in Community Management, the Communities product isn't supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a supported browser.

> 💡 **Tip:** Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

If the Salesforce Communities Management package is installed in your organization, each of the dashboard pages has a default mapping to a dashboard from the package. You can overwrite these values as needed.

Use the following steps to map or update your dashboards in Community Management:

1. From within the community, click ⚙ in the global header.

Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Dashboards** > **Settings**.

3. For each of the pages, select the dashboard you want to show to community managers.

The dashboard you map to **Home** displays on your Community Management **Home** page.

4. Click **Save**.

Dashboards are visible to community managers when they expand the **Dashboards** section or visit the home page in Community Management.

Verify the dashboard mappings by clicking **Dashboards** and then clicking each page name. If you mapped a dashboard to the **Home** page, check that out too.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To map dashboards in Community Management:

- "Create and Set Up Communities" OR "Manage Communities"

  AND

  "Manage Dashboards in Public Folders"

  AND

  Is a member of the community whose Community Management page they're trying to access.

View Dashboards in Community Management

Use the dashboards in Community Management to monitor the health of your community.

All dashboards in Community Management display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard in Community Management. Remember that although dashboards render in a Lightning view in Community Management, the Communities product isn't supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a supported browser.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Dashboards**.

   > 📝 Note: Your administrator maps the dashboards. If the **Dashboards** section isn't visible, they haven't been mapped for your community.

   Pages that have dashboards mapped to them appear in the **Dashboards** section or on the **Home** page.

3. Click the dashboard page you want to view.
   The dashboard appears. For an immediate refresh of dashboard data, click **Refresh**.

   Dashboards in Community Management are not automatically refreshed. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

4. To view a related report, click **View Report** on the dashboard.

   Remember that the dashboards are configured to display community-specific data.

   Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

Remember that you can customize your dashboard at any time. To edit your dashboard, go to the Dashboards tab in your internal Salesforce org and select the dashboard from the list.

Create a Dashboard to Display in Community Management

You can show any dashboard in Community Management. However, we recommend creating them based on custom report types available for communities.

> 💡 **Tip:** Keep in mind that you can get preconfigured dashboards in the Salesforce Communities Management package available for download on the AppExchange.

All dashboards in Community Management display as Lightning dashboards, regardless of what types of dashboard you're using or what interface your org is using. For example, a Salesforce Classic dashboard gets displayed as a Lightning dashboard in Community Management. Remember that although dashboards render in a Lightning view in Community Management, the Communities product isn't supported in Lightning Experience. Not all browsers support this Lightning view, so make sure you're using a supported browser.

Use the following process to create dashboards to display in Community Management:

1. Create custom report types based on the Networks object.

    Reports and dashboards that are based on the Networks object show community-specific information in Community Management.

    > 📝 **Note:** You can create dashboards based on other objects and expose them in Community Management. Keep in mind that they will show data from across your organization, not just for the community in which you're viewing the dashboard.

    - Select Networks as the primary object.
    - Select a child object:
        - Chatter Messages
        - Feed Revisions
        - Groups
        - Network Audits
        - Network Activity Daily Metrics
        - Network Members
        - Network Membership Daily Metrics
        - Network Moderations
        - Network Public Usage Daily Metrics
        - Network Unique Contributor Daily Metrics
        - Recommendation Metric
        - Topic Assignments
        - Topics

2. Use the custom report type to create a report.

    Be sure not to filter the report by Network ID to ensure that the report dynamically displays data for the community you view it from. Adding a Network ID filter causes the report to only show data for the community with that Network ID, regardless of which community you view it in.

3. Create a dashboard with components. Select the report as your source type.

    - Add a component for each report you want to include in your dashboard.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create custom report types:
- "Manage Custom Report Types"

To create, edit, and delete reports:
- "Create and Customize Reports"

To create and share dashboards:
- "Manage Dashboards in Public Folders"

- Find your report on the Data Sources tab and add it to the component.

In order for a Salesforce Classic dashboard to optimally render in the Lightning view used in Community Management, make sure that your dashboard meets the following requirements:

- Includes only up to 20 reports arranged within three columns
- Doesn't include unsupported charts, such as funnel, scatter, table, multi-metric, pie, and gauge

  For a list of dashboard features not supported in the Lightning view, see Reports and Dashboards: Lightning Experience Limitations.

  > Note: Metrics are supported in the Lightning view, but they display as large tiles. We recommended that you don't include metrics in your dashboards.

4. Share the folder that you save your dashboard in with your community managers.

5. In Community Management, click **Dashboards** > **Settings** to map your dashboard.

When a community manager accesses Community Management, the dashboard appears under **Dashboards**. If you mapped a dashboard to the **Home** page, the dashboard appears there.

Dashboards in Community Management are not automatically refreshed. To see the latest data, click **Refresh**. If you access the dashboard after it has been recently refreshed, the dashboard displays the globally cached data from the last refresh. All role-based external users in your community can refresh dashboards set up with "Run as specified user" and "Run as logged-in user" up to 1,000 times daily per org. Scheduled and automatic refreshes don't count against the limit. There is no refresh limit for internal users.

Remember that you can customize your dashboards at any time. To edit your dashboard, go to the Dashboards tab in your internal Salesforce org and select the dashboard from the list.

Community Moderation Strategies and Tools

Community moderation allows you to empower members of your community to monitor content and ensure that it is appropriate and relevant.

Moderation is crucial for a community to thrive. You need active moderators who are willing to spend time ensuring that the members and content in your community are appropriate and helpful. You also need to empower members to speak up when they view something as inappropriate or offensive.

With Communities

- Designate specific users as moderators so that they can closely monitor the community
- Allow members to flag posts, comments, files, and private messages that are inappropriate
- 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, or replace keywords in user-generated content, such as posts or comments
- Track flagging and moderation activity within your community

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

To report on moderation activity in your communities, query the flagged content or activity using the API or create a custom report type using `Networks` as the primary object. You can also install the Salesforce Communities Management package to view Insights reports that help you track moderated content in your community.

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

Who can be a moderator?

Who can moderate items in a community depends on permissions or if the user is a group manager or owner. This table shows who can moderate and what actions they can take in the user interface.

Action	User with "Moderate Communities Feeds"	User with "Moderate Communities Files"	Group Owner or Manager (on items in groups they own or manage)
Remove flags on a post or comment	✔		✔
Delete a post or comment	✔		✔
Remove flags on a file		✔	✔
Delete a file		✔	✔

Enable Users to Flag Items in Your Community

Turn on flagging for your community to empower members to flag posts, comments, files, and private messages that they deem inappropriate.

Community moderation must be enabled for your organization before you can allow members to flag content in the user interface. If you don't see the option to allow flagged content, contact your administrator.

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

Once an item is flagged, your community moderator can review it and take action. Remember that moderators can continue to flag items even if flagging is disabled for community members.

1. Access Community Management in either of the following ways.

    - From the community, click ⚙ in the global header.
    - From Setup, enter *All Communities* in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.

2. Click **Administration** > **Preferences**, then select `Allow members to flag content`.

3. Click **Save**.

With this setting enabled in a community:

- Members can flag posts, comments, and files using the `Flag as inappropriate` option.
- Members can flag private messages from within the community 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 communities they are members of.

    > 📝 **Note:** Private messages can't be flagged in partner or customer portals, your internal organization, or from Salesforce1.

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

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

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To enable users in your community to flag items:
- "Create and Set Up Communities"

    AND

    Is a member of the community whose Community Management page they're trying to access.

If your community uses a Community Builder-based template you won't see the **Flagged Files** node in Community Management even if `Allow members to flag content` is enabled. To show the **Flagged Files** node, select `Show all settings in Community Management` from the **Preferences** page.

Limit Files in Your Community

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

Community file moderation must be enabled for your org before you can limit files in your community. If you don't see the option to limit files in Community Management, contact Salesforce.

Your community file limits apply to files uploaded by community members anywhere in the community—in posts and comments, directly in the Files tab, and also from Salesforce1. You can also set community file limits using the SOAP API 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 community 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 community still apply.

- Files uploaded in your internal Salesforce org that are shared in a community aren't subject to community file limits.

1. Access Community Management in either of the following ways.

    - From the community, click ⚙ in the global header.

    - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.

2. Select **Administration** > **Preferences**, then enter your limits in the Files section on the page.

    - `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*.

    - `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 community's 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.

Available in: Salesforce Classic

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

USER PERMISSIONS

To limit the files in your community:
- "Manage Communities" OR "Create and Set Up Communities"

    AND

    Is a member of the community whose Community Management page they're trying to access.

Create Moderation Criteria for Your Community

Create criteria that defines offensive language or inappropriate content that you don't want in your community. Criteria are used in rules to moderate user-generated content, such as posts and comments.

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

Some things to keep in mind:

- Your organization can have up to 30 keyword list criteria. This limit is per organization, not per community.
- 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 includes *BadWord*, it's matched when a user types *BADWORD* or *badword.*

Set up criteria to use in your moderation rules:

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Moderation** > **Criteria**.

3. Click **New**.

4. Enter a name, unique name, and description for your criteria.

5. Click **Save**.

6. Update the keywords in your criteria.

   To add keywords, click **Add**.

   - Keywords can 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 **Criteria** page. If criteria is being used by a rule, you can't delete it.

USER PERMISSIONS

To view, create, edit, and delete criteria:
- "Manage Communities" OR "Create and Set Up Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

Create Moderation Rules for Your Community

Create and modify rules for your community to moderate user-generated content. Each rule specifies the user-generated content the rule applies to, the criteria to enforce the rule on, and the moderation action to take. You can create rules that block, flag, or replace user-generated content that contains offensive language or inappropriate content.

If your community is using the Napili template, moderation rules apply to questions created by your community members.

You can also use the Metadata API or Tooling API to set up moderation rules.

Some things to keep in mind:

- Your organization can have up to 30 rules. This limit is per organization, not per community.
- Each rule can have up to three criteria.
- Rules that block content run first, followed by rules that replace content, then rules that flag content. If two or more rules perform the same action, the oldest rule runs first.

> 💡 **Tip:** Before creating a rule, make sure you've created criteria to use in that rule.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Moderation** > **Rules**.

3. Click **New**.

4. Complete the following fields:

   - `Name`—Enter a name for your rule.
   - `Unique Name`—Enter a unique name for your rule. The unique name used by the API and managed packages.
   - `Description`—Optionally, enter a description.
   - `Applies To`—Specify which types of user-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.
   - `Criteria`—Select the criteria to enforce this rule.

     > ⛔ **Important:** If you activate a rule without specifying criteria, the rule either flags all posts and comments or prevents users from creating posts and comments entirely. Yikes! Be careful.

   - `Moderation Action`—Specify what you want to happen when the criteria is matched.
     - `Block` prevents the content from being published.
     - `Replace` publishes the content with the keywords replaced as asterisks. For example, `BadWord` becomes `*******`.
     - `Flag` publishes the content and then automatically flags the content as inappropriate.

   - `Message for User`—Specify the message that your user sees when their content is blocked. If you don't specify a message, the user sees the standard message: "You can't use `%BLOCKED_KEYWORD%` or other inappropriate words in this community. Review your content and try again." The `%BLOCKED_KEYWORD%` variable displays up to five blocked words. You can also use this variable in your own custom message.

     > 💡 **Tip:** For international communities, you can translate this user message. From Setup, enter `Translate` in the Quick Find box, then select **Translate**. To provide a translation for the user message, select the Moderation Rule setup component and expand the community the rule belongs to.

- `Activate Rule`—If selected, the rule is activated.

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

How and when do community moderation rules execute?

Rules that block content run first, followed by rules that replace content, then rules that flag content. If two or more rules perform the same action, the oldest rule runs first. Community moderation rules work with existing triggers. On the server, Salesforce executes community rules within the standard order of execution.

Rules that block content execute during system validation. Rules that block content ignore changes made by `before` triggers. For example, if a `before` trigger changes a feed post, a moderation rule that blocks content isn't aware of the changed content and executes on the original content.

Rules that replace content execute before database saves.

Rules that flag content execute after workflow rules.

Moderate Posts and Comments in Your Community

USER PERMISSIONS		EDITIONS
To view flagged items, remove flags, and delete posts or comments:	"Moderate Communities Feeds"	Available in: Salesforce Classic
To view flagged content in Community Management, remove flags, and delete posts or comments:	"Moderate Communities Feeds" AND "Manage Communities" OR "Create and Set Up Communities" AND Is a member of the community whose Community Management page they're trying to access.	Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Community moderators can review the Flagged Posts feed which contains a list of posts and comments that members of the community have flagged as inappropriate and take action. If you're a group owner or group manager, you can view flags and take action on items in your groups.

Flagged posts and comments have a small orange flag next to the post or comment date. The number next to the flag indicates how many people have flagged the item. The moderator can review each item and decide whether to take action.

A few things to bear in mind about flagged items:

- Moderators can only view and act on items they have access to.
- Within in group in a community, group owners or managers can moderate items in their groups, including viewing or removing flags and deleting posts, comments, or files if necessary. They can't see the Flagged Posts feed in Community Management.
- If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

1. From within the community, click ⚙ in the global header.

Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Moderation** > **Flagged Posts** to view a feed of flagged posts and comments.

3. Click **Delete** or **Remove Flags**, depending on whether you agree that the post or comment is inappropriate and should be deleted or whether the post or comment was flagged in error.

4. Click **OK**.

Alternatively, you can moderate directly within context of your community by removing flags or deleting content in the feed.

> 💡 **Tip:** If you want to receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

Moderate Files in Your Community

USER PERMISSIONS		EDITIONS
To view the file detail page, remove flags, and delete files:	"Moderate Communities Files"	Available in: Salesforce Classic
To view flagged files in Community Management, remove flags, and delete files:	"Moderate Communities Files" AND "Manage Communities" OR "Create and Set Up Communities" AND Is a member of the community whose Community Management page they're trying to access.	Available in: **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions

Community moderators can review and take action on the Flagged Files list, which contains a list of files that members of the community have flagged as inappropriate. Group owners or group managers can view flags and take action on files in their groups.

Members of your community may post files that aren't appropriate because they contain sensitive information or content that may be offensive. Other members of the community can flag these files for review. Flagged files have a small orange flag. The number next to the flag indicates how many people have flagged the item.

Moderators can review and delete files in any community that they have access to.

Within a group in a community, group owners and managers can review and remove flags on files in the groups they own and manage if `Allow members to flag content` is enabled for their communities. If `Allow members to flag content` is disabled in a community, only moderators can flag items and view flagged items.

If your community uses a Community Builder-based template you won't see the **Flagged Files** node in Community Management even if `Allow members to flag content` is enabled. To show the **Flagged Files** node, select `Show all settings in Community Management` from the **Preferences** page.

1. From within the community, click ⚙ in the global header.

Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Moderation** > **Flagged Files** to view a list of flagged files.

3. From the Action column, select **Remove Flags** or **Delete** from the drop-down menu, depending on whether you agree that the file is inappropriate and should be deleted or whether the file was flagged in error.

   You can click 🔍 to preview the file without leaving the page.

4. If prompted, click **OK**.

Alternatively, you can moderate directly within context of your community by removing flags or deleting content on the file detail page.

💡 **Tip:** If you want to receive an email each time an item in your community is flagged, select the **Flags an item as inappropriate** checkbox on your Email Settings page.

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

Moderate Private Messages in Your Community

Community moderators can review and act on a list of private Chatter messages that members of the community have flagged as inappropriate or as spam.

The Moderate Communities Chatter Messages permission allows users to moderate private messages only in communities they're a member of. This permission doesn't allow users to see the contents of the messages. To see the contents of private messages, users need the "Manage Chatter Messages" permission. This permission allows the moderator to see *all* private messages in the Salesforce org. The "Modify All Data" permission allows moderators to remove flags or delete a private message in the SOAP API.

⛔ **Important:** Keep these limitations in mind:

- Moderators can only use the SOAP API to remove a flag or delete a flagged private message.
- Community members can't flag private messages sent from communities that they aren't a member of or that haven't turned on flagging for their users.
- Users can't flag private messages in your internal organization, in Salesforce1, or in partner and customer portals.

There are a few ways to monitor and manage flagged messages in your communities:

- Use a preconfigured Insights report.

  This Community Management Insights report helps you track trends and stay on top of private message spamming attacks in your community. You can view who sent the message, when it was sent, and who flagged the message. Use this report as a starting point, then use the API to remove flags or delete the messages.

  For detailed information about this package, see Report on Communities with the Dashboards and Insights Package.

- Create your own report.

  First, create a custom report type using `Networks` as the primary object and `Network Audits` as the secondary object. Then create a 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.

- Directly query the flagged messages from the API and then delete them.

💡 **Tip:** If you want to receive an email each time a private message in your community is flagged, select the **Flags an item as inappropriate** option on the Email Settings page. To receive emails, you must have the "Moderate Communities Chatter Messages"

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To moderate private messages and remove a flag or delete a private message:

- "Moderate Communities Chatter Messages" OR "Manage Chatter Messages"

  AND

  "Modify All Data"

To view the contents of a flagged private message:

- "Manage Chatter Messages"

and "Moderate Communities Feeds" permissions. To set your email preferences, go to your profile page within a community, click the drop-down button (▾) in the upper-right corner and select **My Settings**, then click **Email Settings**.

Set Up Apex Triggers for Flagging Items

Use triggers to create custom advanced moderation logic that automatically flags items in your community.

💡 **Tip:** Did you know you can do this in the UI? Most communities don't need custom moderation triggers. You can create moderation rules and criteria directly in Community Management. For more information, see Create Moderation Rules for Your Community.

Using triggers to automatically flag items allows you to moderate your community behind the scenes. These flags are **only** visible to moderators. You can view flags on the Flagged Posts feed on the Community Management page, 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 either 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 community that contain `BadWord`.

```
trigger autoflagBadWord on FeedItem (after insert) {
    for (FeedItem rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope))
            continue;

        if (rec.body.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new NetworkModeration(entityId=rec.id,
visibility='ModeratorsOnly');
            insert(nm);
        }
    }
}
```

A similar trigger on comments would look like this.

```
trigger autoflagBadWord on FeedComment (after insert) {
    for (FeedComment rec : trigger.new) {
        if (!<CommunityId>.equals(rec.networkScope))
            continue;

        if (rec.commentBody.indexOf('BadWord') >= 0) {
            NetworkModeration nm = new NetworkModeration(entityId=rec.id,
visibility='ModeratorsOnly');
            insert(nm);
        }
    }
}
```

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To create triggers:
- "Modify All Data"

Organize Self-Service Communities with Topics

Topics are a fantastic way to organize content in any community. Community members can add topics to posts and discussions, and structure content organically. When you set up a self-service community with the Napili template, you can use the Community Management page to quickly guide members to key navigational and featured topics.

On the Community Management page, you choose navigational topics and subtopics to provide a consistent map of your community, and featured topics to highlight current, popular conversations. In the community itself, member-created topics let users organize information for each other, creating a personalized experience that boosts community engagement.

In a self-service community, the Napili template specifies the layout and design of navigational, featured, and member-created topics. Below are visual examples of each type in an active community.

> 💡 **Tip:** To add navigational and featured topics to other types of communities, Apex developers can use the ConnectApi.ManagedTopics class in a Visualforce page.

Navigational topics

On every page of a self-service community, navigational topics are available from the Topics menu at upper left. Community members can also see all the community's navigational topics and subtopics in one place in the topic catalog.
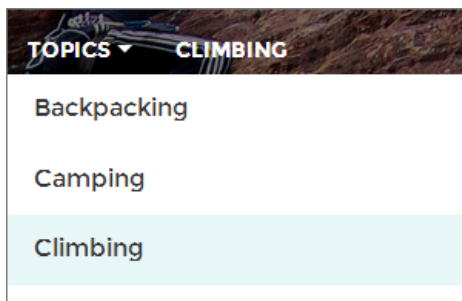
When visitors choose a navigational topic, the banner image you selected for it appears at the top of the page.
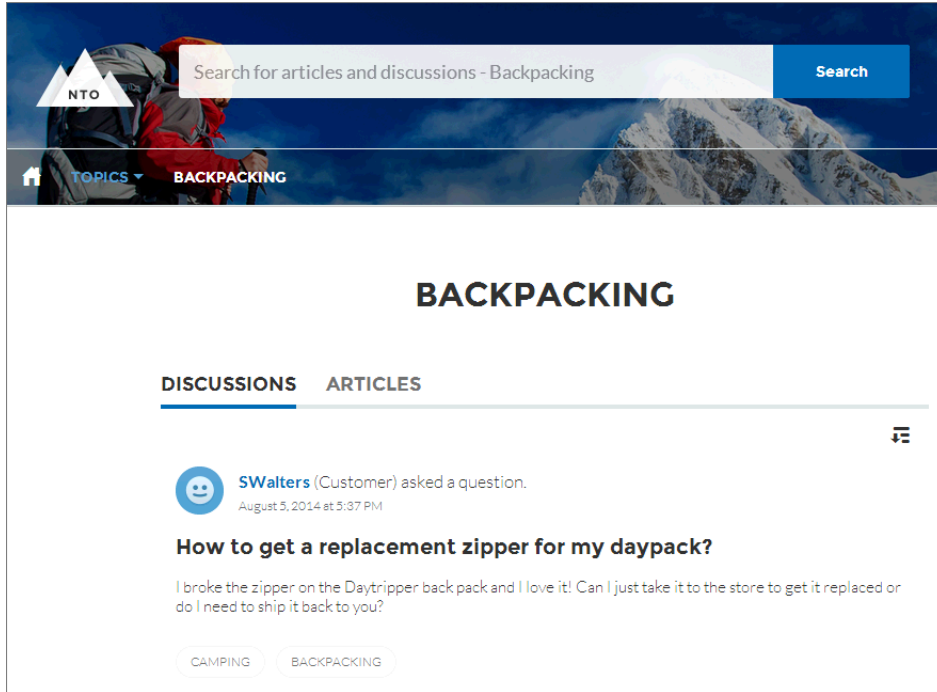
Featured topics

Featured topics are accessible from the body of your community 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 Community Builder appears.)
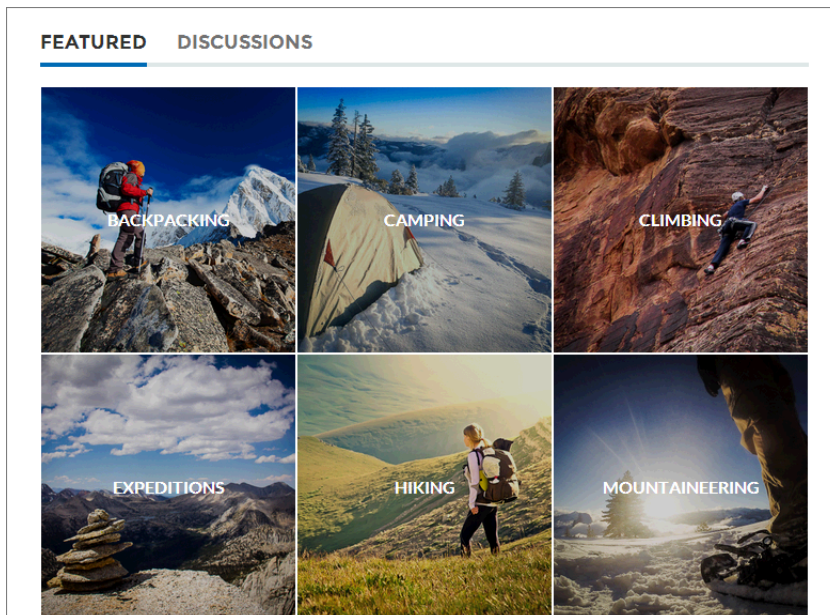
Member-created topics

When posting questions, community members create topics by using hashtags in body text, or typing in the topic suggestions box below. (In Setup, the "Assign Topics" and "Create Topics" permissions must be enabled for community 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 on the Community Management page.

Set Up Navigational Topics

Structure your community's content and help your users find what they need with navigational topics. If your organization 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 the Chatter REST API.)

1. From Setup, enter `Topics for Objects` in the `Quick Find` box, then select **Topics for Objects**, and enable topics for all the article types you want to include.

   📝 **Note:** Enabling topics disables public tags on articles. Personal tags aren't affected.

2. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

3. Click **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 drop down menu (under Show the 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 organization 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 Community Management and repeat the step above.

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.)

7. Repeat steps 4-6 to create several navigational topics for your community. Then click **Save**.

8. Use subtopics to further categorize your content. Associate articles for each set of subtopics for a more granular organization.
   The following is the maximum number of navigational topics and subtopics you can have in a Napili community template.

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

💡 **Tip:** To quickly edit existing navigational topics, simply hover over a topic name, and do any of following:

- 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 Featured Topics

Featured topics highlight current, popular community conversations. Change them regularly to keep community members up-to-date and engaged.

1. From the community, click ⚙ in the global header.

2. Click **Topics** > **Featured Topics**.

3. From the pop-up menu at right, select a navigational or member-created topic you want to feature. Then click **Add**.

   💡 **Tip:** Using the Chatter REST API, you can create unique featured topics, separate from navigational or member-created ones.

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

   (Thumbnail images are scaled to 250 x 250 pixels. To prevent distortion, create image files with those dimensions.)

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

To quickly edit existing featured topics, simply hover over a topic name, and do any of following:

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

Manage Topics in Communities

As the number of topics in a community grows, curate them to improve usability. In Community Management, you can create, merge, rename, and delete topics in one convenient location.

1. From the community, click ⚙ in the global header.

2. At left, click **Topics** > **Topic Management**.

3. Do any of the following:

   - To create a topic (often with a plan to merge existing ones into it), click **New**.

   - To combine existing 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.

   - To rename or delete a topic, click 🖉.

     If you don't see a topic you want to rename or delete, either search for it or click **Show More** below the topic list.

   💡 Tip: For international communities, you can translate names of navigational and featured topics. From Setup, search for and select `Translate`. Then select the `Managed Topic` setup component, and expand a community to see its master topic names.

   📝 Note: Topics are only supported on English articles.

Add Topics to Articles or Remove Them

Easily add multiple topics of any type to specific articles, or quickly remove them as community needs change.

📝 Note: Topics are only supported on English articles.

1. From the community, click ⚙ in the global header.

2. Click **Topics** > **Article Management**.

3. Use the search bar to look for articles. Filter your search by selecting a data category group, followed by a specific category.

4. Click an article, and then type to assign topics, or click existing ones to remove them.

Customize Recommendations in Communities

Create recommendations to drive engagement for your community, encouraging users to watch videos, take trainings, and more. Edit these recommendations in Community Management, where you can target specific audiences and use channels to specify locations for the recommendations.

1. Access Community Management in either of the following ways.

   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.

2. Select **Recommendations** > **Recommendations**.

3. 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 community.

   Default Channel
   > Recommendations in the default channel appear in predefined locations, such as directly in the feed in the Salesforce1 mobile browser app and on the Home and Question Detail pages in communities using the Summer '15 or later version of the Napili template.

   Custom Channel
   > You choose the pages where you want these recommendations to appear. In Community Builder, add the Recommendations 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.

4. Click **New**.

5. Complete the following fields:

   - `Name`—Enter a name for the recommendation in Community Management. This name doesn't appear in the community.
   - `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.
   - `Audience`—Select an audience for the recommendation. If you don't select an audience, all members of the community see the recommendation.

     💡 Tip: To create an audience that appears in this drop-down list, in Community Management select **Recommendations** > **Audiences** and click **New**.

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

     When disabled, recommendations that exist in feeds in the Salesforce1 mobile browser app are not removed, but no new recommendations appear. In communities using the Summer '15 or later version of the Napili template, disabled recommendations no longer appear.

6. Click **Save**.

💡 Tip: To remove a recommendation, in Community Management, select **Recommendations** > **Recommendations**, and click
the recommendation name. At the bottom of the recommendation details, click **Delete**.

Target Community Member Audiences for Your Recommendations

Create audiences of new community members, or use the API to manage customized lists of
audience members.

1. Access Community Management in either of the following ways.

- From the community, click ⚙ in the global header.

- From Setup, enter `All Communities` in the `Quick Find` box, then select **All
  Communities**. Then click **Manage** next to the community name.

2. Select **Recommendations** > **Audiences**.

3. Click **New**.

4. Complete the following fields.

- `Name`—Enter a name for the audience in Community Management.

- `Audience Type`

  - Select **New Members** to create an audience based on how long users have been
    community 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.

5. Click **Save**.

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

💡 Tip: To remove an audience, in Community Management, select **Recommendations** > **Audiences**, and 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 community members).

Build Engagement with Reputation Levels

Enable Reputation in Your Community

Enable reputation in your community so that members are recognized and rewarded for participating.

A powerful tool for a community manager is the ability to recognize individual members for their participation, because 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 set of reputation levels in the community. A community manager can personalize labels and point values from the Community Management page.

Members start to accrue points by performing the actions that have assigned point values. Once the member exceeds the top of the level's point threshold, they move up a level. They, and other members of the community, 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. Access Community Management in either of the following ways.

   - From the community, click ⚙ in the global header.
   - From Setup, enter `All Communities` in the `Quick Find` box, then select **All Communities**. Then click **Manage** next to the community name.

2. Click **Administration** > **Preferences**.

3. Select **Enable setup and display of reputation levels**, then click **Save**.

After you enabled reputation, a default point system and set of reputation levels is available on the Community Management page. The default reputation points are as follows:

Action	Points
Community 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.

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 community template doesn't have Chatter enabled, the Reputation node won't appear in Community Management. To show the Reputation node, go to **Administration** > **Preferences** and select **Show all settings in Community Management**.

Set Up Reputation Levels

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

When reputation is enabled for a community, 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:** A community must have at least three reputation levels and can have up to 50.

1. From within the community, click ⚙ in the global header.

   Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Reputation** > **Reputation Levels**.

   From here you can:

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

     > 📝 **Note:** You can't revert to the default reputation level images from the Salesforce user interface. Use the Salesforce Chatter REST API to do this.

   - 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.

EDITIONS

Available in: Salesforce Classic

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

USER PERMISSIONS

To update reputation levels:
- "Manage Communities"

  AND

  Is a member of the community whose Community Management page they're trying to access.

- Remove a level by clicking ⊗ next to the level.

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

You can now update the point system for the community. The point system determines how many points a user gets when they perform certain actions or when others recognize their contributions by commenting, liking, or sharing their posts. Reputation level increases are posted to member feeds.

You can translate reputation level names so that international community 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 community.

Set Up Reputation Points

Set up a point system to reward users for participating in the community.

When reputation is enabled for a community, there is a default point system set up. 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 does not get points.

The table shows the default events and points.

Action	Points
Community 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

Action	Points
Your answer is marked as best	20
Knowledge	
Endorsing someone for knowledge on a topic	5
Being endorsed for knowledge on a topic	20

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

> **Note:** In organizations with reputation enabled prior to the Winter '15 release, actions associated with questions and answers will be available at the time of the release and their default point values will be set to 0. Existing user reputation points will not be affected by the release, and users won't accrue points from these actions until you configure point values for them.

1. From within the community, click ⚙ in the global header.

    Members of the community who have the "Create and Set Up Communities" permission can also access Community Management from the All Communities page in organization setup.

2. Click **Reputation** > **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 community.

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

MORE RESOURCES FOR COMMUNITY MANAGEMENT

Community Management Resources

When you're managing a community, every extra bit of information helps. Use these resources to assist you with your daily community management duties.

success.salesforce.com

Have a question about Communities? Have a great idea about community management that Salesforce should implement? Know a lot about communities and want to help others? Visit the Salesforce Success Community and start collaborating with other Salesforce Communities users just like you! From the Salesforce Success 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

A playbook that contains strategies and tips on how to grow engagement in your community.

INDEX