



# GETTING STARTED WITH THE IDEAS BASE THEME

## Introduction

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## Requirements

### Tip

The Ideas base theme only supports one Ideas community. If you have more than one community in your organization, you must choose which community uses the Ideas base theme.

To install and customize the base theme:

- Contact Salesforce and request to be part of the Ideas base theme limited availability program. Your Salesforce representative will then do the following:
  - Send you a link to the base theme package on the AppExchange along with a password that allows you to download the package. You must use this link to access the base theme because you cannot search for the base theme package on the AppExchange.
  - Enable the Ideas Extended Standard Controllers feature for your organization. These new controllers are used within the base theme and must be enabled for the base theme to function correctly.

- Enable the following Ideas features:

- Categories field

To determine whether the `Categories` field is enabled, from the object management settings for ideas, find the fields area, and make sure `Categories` appears in the standard fields list. Go to Setup, enter `Ideas` in the `Quick Find` box, then select **Fields**. If the `Category` field appears instead of the `Categories` field, from Setup, enter `Ideas Settings` in the `Quick Find` box, then select **Ideas Settings** to enable the `Categories` field. Once you enable the `Categories` field, it cannot be disabled.

- Rich text editor

To enable the rich text editor, make sure the `Enable Text-Formatting, Images and Links` checkbox is selected on the Settings page (From Setup, enter `Ideas Settings` in the `Quick Find` box, then select **Ideas Settings**). Once you enable the rich text editor, it cannot be disabled.

These features are automatically enabled in some organizations, but may need to be enabled in your organization. You cannot install the base theme until these features are enabled.

- Make sure you already have a Lightning Platform site set up and configured for Ideas. The Customer Portal associated with your Lightning Platform site must be enabled for self-registration.

You should first set up your Ideas site as described in the Ideas Implementation Guide, and then set up a Lightning Platform site as described in the Lightning Platform Sites Implementation Guide. You can search the online help for links to these documents.

- Make sure you have one free user license available. When you deploy the base theme package, a temporary admin account needs to be created to test the functionality of the Visualforce controllers that come with the base theme. This account is removed once the tests complete.

## Installation Overview

To install, configure and customize the base theme, follow these high-level steps:

1. [Install and deploy the base theme](#)
2. [Complete the pre-configuration tasks](#)
3. [Configure the Ideas Site Setup object](#)
4. [Set the active home page for your site](#)
5. [Customize the base theme](#) (optional)

## Installing the Base Theme

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To install the base theme package:

1. Click on the installation link provided to you by your Salesforce representative.
2. Enter your username and password for the Salesforce organization in which you want to install the package, and then click **Log In**.
3. If the package is password-protected, enter the password you received from the publisher.
4. Review the package items and click **Continue**.
5. Click **API Access**. You'll see an overlay with a list of the API access settings that package components have been granted. Review the settings to verify they're acceptable, and then close the overlay to return to the installer screen.
6. Choose the `Grant access to admins only` security option, and click **Next**.
7. When prompted that the package is ready to be installed, make sure the `Ignore Apex test failures` checkbox is not selected, and click **Install**.

You will either receive a message that the installation was successful or that the installation is taking longer than expected and you will be notified by email once the installation completes successfully.

## Pre-Configuration Tasks

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Now that you have installed and deployed the base theme, you need to gather information about your Ideas site so you can successfully apply the base theme to your site.

### Tip

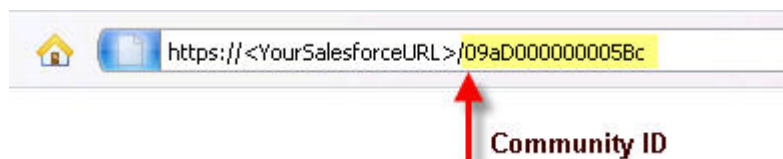
Create a file (using Notepad or another text editor) to store the information that you gather in the following tasks. This will make it easier to copy and paste information from the file into the setup fields when you configure the Ideas Site Setup object.

### Locate the Community ID

To locate the ID of the community that you want to use the base theme:

1. From Setup, enter `Communities` in the `Quick Find` box, then select **All Communities**.
2. Click the name of the community.
3. Look at the Salesforce URL in your Web browser, and locate the last series of alphanumeric characters. These characters are the community ID. Copy and paste this ID into your text file for later use.

### Locating the Community ID



## Locate the ID of your Community Experts Group

If a community experts group has been set up for your Ideas site, you need to locate the ID of this group. If your Ideas site does not have a community experts group, you can skip this task.

1. From Setup, enter *Communities* in the *Quick Find* box, then select **All Communities**.
2. Click the name of the community that you want to use the base theme.
3. Note the name that appears in the *Experts Group* field.

### Identifying the Experts Group



4. From Setup, enter *Public Groups* in the *Quick Find* box, then select **Public Groups**.
5. Click the name of the group that you noted in the previous step.
6. Look at the Salesforce URL in your Web browser, and identify the alphanumeric characters that appear after "id=" and before "&setupid". These characters are the group ID. Copy and paste this ID into your text field for later use.

### Identifying the Experts Group ID



## Create an Account for Self-registering Users

When users self-register on your Ideas site, they are associated with an account that you specify. After a user self-registers, he or she automatically appears in the Contacts related list for this account. If you already

have an account that you can use for this purpose, proceed to the next task. Otherwise, create the account by going to the Accounts tab and clicking **New**. If you need assistance filling out the details of the account, click the help link on the page. The `Account Name` field is the only required field.

 **Note:** The owner of this account must have a role specified in his or her user profile.

## Identify the Picklist Values for the Categories and Status Fields

If your Ideas site has picklist values defined for the Categories and Status fields, you need to re-enter these values when you set up the Ideas Site Setup object. To ensure that you re-enter each value correctly, we recommend you look up these values and enter them into your text file for later use.

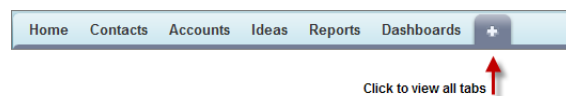
1. From Setup, enter `Communities` in the `Quick Find` box, then select **All Communities**.
2. Click the name of the community that you want to use the base theme.
3. Click **Edit** next to the Categories field. In your text file, enter the values that appear in the Selected Values column. The values in the Available Values column do not apply to this community.
4. Go back to the previous page and click **Edit** next to the Status field. In your text file, enter the values that appear in the Selected Values column. The values in the Available Values column do not apply to this community.

## Configuring the Ideas Site Setup Object

When you installed the base theme, a new custom object named Ideas Site Setup was automatically created. You need to configure this object so the base theme can be applied to your Ideas community.

1. Click the plus icon (+) next to the main tabs to view all tabs available to you.

### Viewing All Tabs in Salesforce

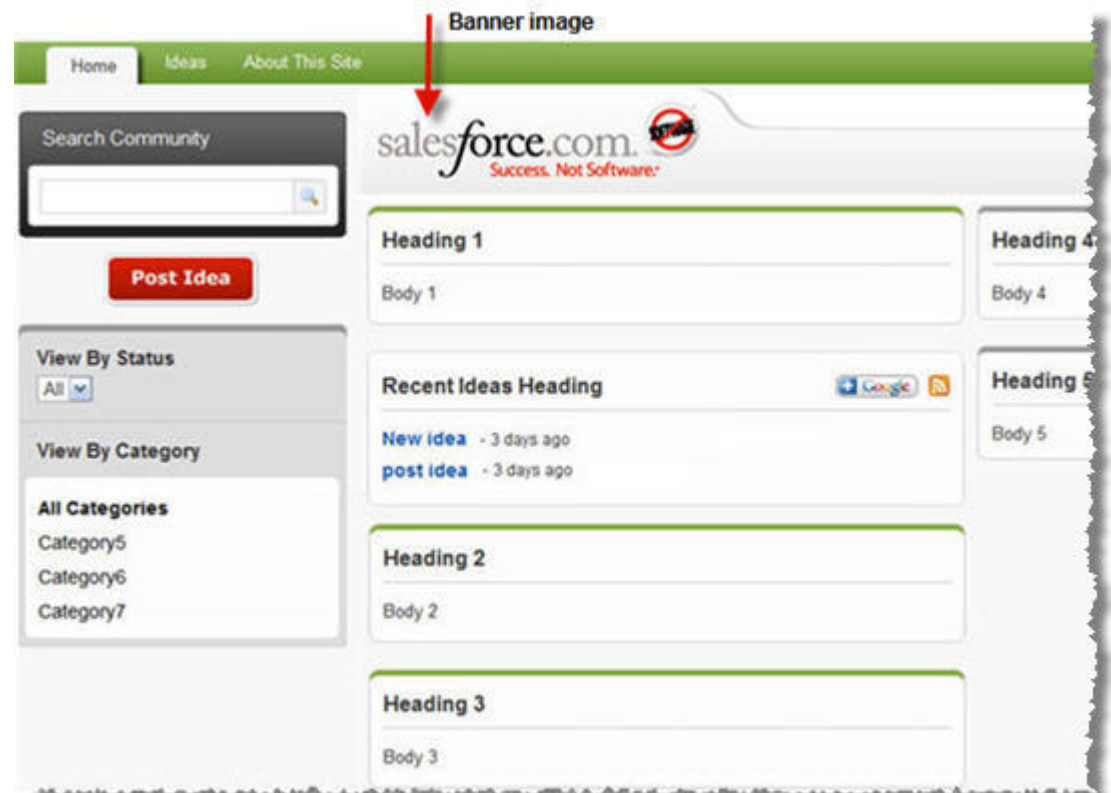


2. Click the **Ideas Site Setup** object.
3. Click **New**.
4. Specify the following information:
  - `Ideas Site Setup Name` (required)—The name of this Ideas Site Setup object.
  - `Community Id` (required)—The ID of the community that you want to use the base theme. You can only apply the base theme to one community in your organization.
  - `Experts Group Id`—The ID of the experts group that is responsible for monitoring and responding to ideas and comments in the community.
  - `Cache Max Age` (required)—The amount of time (in seconds) the content delivery network (CDN) server caches the pages of your Ideas site. A value of zero (0) disables caching. CDN caching is automatically enabled on Lightning Platform sites. We recommend setting this to 300 seconds (5 minutes).

- **Portal Self-Registration Account**—The account that is associated with new users then they self-register on your Ideas site. When a new user self-registers, the user appears in the Contacts related list for this account.
  - **Custom CSS URL**—The URL of your custom Cascading Style Sheet (CSS) if one exists. Your custom CSS overrides the styles specified in the CSS that comes with the base theme. If you want to further modify the look and feel of your Ideas site, we recommend you add your own custom CSS using this field. For more information, refer to [Customization Guidelines](#) on page 7.
  - **Categories**—The picklist values for the Categories field. You must enter the picklist values exactly as they have been specified for the community when the Ideas site was set up. Enter one picklist value per line. You must spell each picklist value correctly or a validation error occurs when you try to save your changes.
  - **Statuses**—The picklist values for the Status field. You must enter the picklist values exactly as they have been specified for the community when the Ideas site was set up. Enter one picklist value per line. You must spell each picklist value correctly or a validation error occurs when you try to save your changes.
5. In the Home, About, Login, Register, Forgot Password, and Footer sections, add the heading and body text that you want to appear on the various pages of your Ideas site. You can also include a banner image on the Home and About pages by specifying the image URL.

The following screenshot shows the location of each heading section on the Home page.

**Example of the Home Page**



The following screenshot shows the location of the heading and body section on the About This Site page.

### Example of the About Page




For the Login, Register, and Forgot Password pages, the heading and body section appears in the rightmost column of the page. Footer text appears at the bottom right corner of every page.

6. Click **Save**.

## Setting the Active Home Page for your Site

Once you have configured the Ideas Site Setup object, you need to select the active site home page, verify that the Ideas tab displays to guest users when they visit your site, and enable the Visualforce pages that came with the base theme.

1. Select the active site home page:
  - a. From Setup, enter `Sites` in the Quick Find box, then select **Sites**.
  - b. Click **Edit** next to your Lightning Platform site for Ideas.
  - c. On the Site Edit page, set the `Active Site Home Page` field to `IdeaHome`.
 

 **Note:** There are two idea home pages with very similar names. Do not select `IdeasHome` (plural) as the active home page. Make sure to select `IdeaHome` (singular).
  - d. Click **Save**.
2. Verify the Ideas tab displays to guest users:
  - a. On the Sites page, click the label of your Lightning Platform site for Ideas.
  - b. Click **Public Access Settings**.
  - c. Scroll down to the Tab Settings section and verify the Ideas tab is set to Default On. This allows guest users to view the Ideas tab when they visit your site.
 

If the Ideas tab is hidden, click **Edit** at the top of the page, change the setting to Default On and save your changes.
3. Enable the base theme Visualforce pages:
  - a. On the Sites page, click the label of your Lightning Platform site for Ideas.
  - b. In the Site Visualforce Pages section, click **Edit**.
  - c. Move all the base theme pages from the Available column to the Enabled column. The base theme pages all begin with "idea", for example `ideaList`.

- d. Click **Save**.

## Customizing the Base Theme

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In the future, Salesforce may release updated versions of the base theme for you to download and install. However, the more you customize the base theme, the harder it will be to upgrade to new versions because you will need to re-implement your modifications in the new base theme. As you decide how much of the base theme to customize, consider the tradeoffs between customizability and upgrade costs. Highly customized base themes will require more work to upgrade.

## Using the Cascading Style Sheet (CSS)

While Salesforce does not support or guarantee effortless upgrades for the base theme, below are some guidelines you should consider before you make any changes to the CSS:

- To make future upgrades as seamless as possible, do not modify the cascading stylesheet (CSS) that comes with the base theme. Instead, you can add your own custom stylesheet that overrides the base theme stylesheet. For information on including your own custom stylesheet, see [Configuring the Ideas Site Setup Object](#) on page 4.
- Only make very basic changes to your custom stylesheet. Basic changes include modifying the images and color attributes in the stylesheet, but not altering the spacing and layout. Minimizing changes to the stylesheet does not guarantee a seamless upgrade, but it will make applying those changes to the next version of the base theme much easier.
- Complex stylesheet and Javascript changes that modify the spacing and layout of an Ideas page (such as adjusting the font size, page margins, and padding of objects) will require you to re-test your Ideas site after you install any new version of the base theme. Testing your Ideas site will help ensure that your complex stylesheet and Javascript changes are compatible with the new features and changes available in the new base theme.

To replace the logo in the upper left corner of the base theme pages, use a custom CSS to override the existing image:

1. Open the CSS that came with the base theme.

From Setup, enter *Visualforce Pages* in the **Quick Find** box, then select **Visualforce Pages**, and click the **ideaCSS** page name. Do not edit the content in this CSS.


2. Search for “insertYourLogo” and copy the relevant content from ideaCSS into your custom CSS. Specify a new logo image in your custom CSS, which will override the default image.
3. On the [Ideas Sites Setup](#) page, specify the URL of your custom CSS and save your changes.

You can also use your custom CSS to override other images in the base theme.

## Overriding the Visualforce Pages

If adding your own custom CSS does not provide the necessary changes to the base theme and you need to modify the Visualforce pages, we recommend you clone the Visualforce pages that come with the base theme and modify the cloned copies. You can then override the base theme Visualforce pages with your cloned versions. Do not modify the Visualforce pages or controllers directly.

Modifying and overriding the Visualforce pages will make it much more difficult to incorporate new features that are included in subsequent base theme versions. You will have to plan a migration strategy to re-implement your Visualforce changes into the new base theme. To clone, modify, and override a Visualforce page:

 **Note:** When you clone and modify a Visualforce page, make sure to use the `ideaLayoutWrapper` page as the composition template if you do not want to modify the standard layout. The `ideaLayoutWrapper` page defines the general layout for all the Visualforce base theme pages.

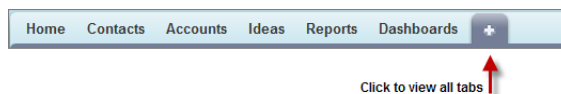
If you want to change the standard layout, clone and modify the `ideaLayout` page (and specify the page override), but still use `ideaLayoutWrapper` as the composition template in your base theme pages. The `ideaLayoutWrapper` page will render your overridden layout page if specified; otherwise, it will render the default content in `ideaLayout`.

1. From Setup, enter *Visualforce Pages* in the **Quick Find** box, then select **Visualforce Pages**.
2. Select the name of the Visualforce page you want to clone and modify.
3. Click **Clone**.
4. Make the necessary changes and give the page a unique label and name (the label and name can be the same but must be different than other pages). Click **Save** when finished.

For information on modifying Visualforce pages, refer to the Visualforce Developer's Guide available in the Salesforce online help.

5. Enable your cloned Visualforce page:
  - a. From Setup, enter *Sites* in the **Quick Find** box, then select **Sites**.
  - b. Click the label of your Lightning Platform site for Ideas.
  - c. In the Site Visualforce Pages section, click **Edit**.
  - d. Move your cloned Visualforce page to the Enabled column.
  - e. Click **Save**.
6. Override the standard base theme page with your newly cloned version:
  - a. Click the plus icon (+) next to the main tabs to view all tabs available to you.

#### Viewing All Tabs in Salesforce



- b. Click the **Ideas Site Setup** object.
- c. Click the name of the setup object used for your Ideas site.
- d. Click **Edit**.
- e. Scroll down to the Page Overrides section, and enter the name of your cloned Visualforce page next to the page you want to override.
- f. Click **Save**.



7. Test to make sure you have successfully overwritten the standard base theme page. From your Lightning Platform site with the base theme, navigate to the new cloned page and make sure it appears instead of the standard base theme page that you overwrote.