

simpplr.

Subscriptions
Spring 18

Subscriptions

Organizations want to ensure that their employees are accessing pertinent, useful, and focused information without forcing the users to aimlessly try to discover it on their own. Simplr is improving our ability to prescribe users to specific experts and content so they don't miss out on critical information.

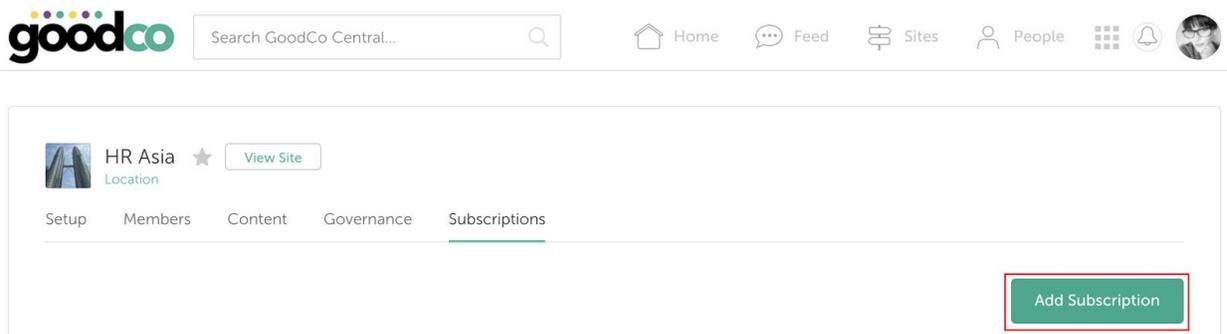
Specifically, Subscriptions create an Audience to auto-follow specific People or Sites.

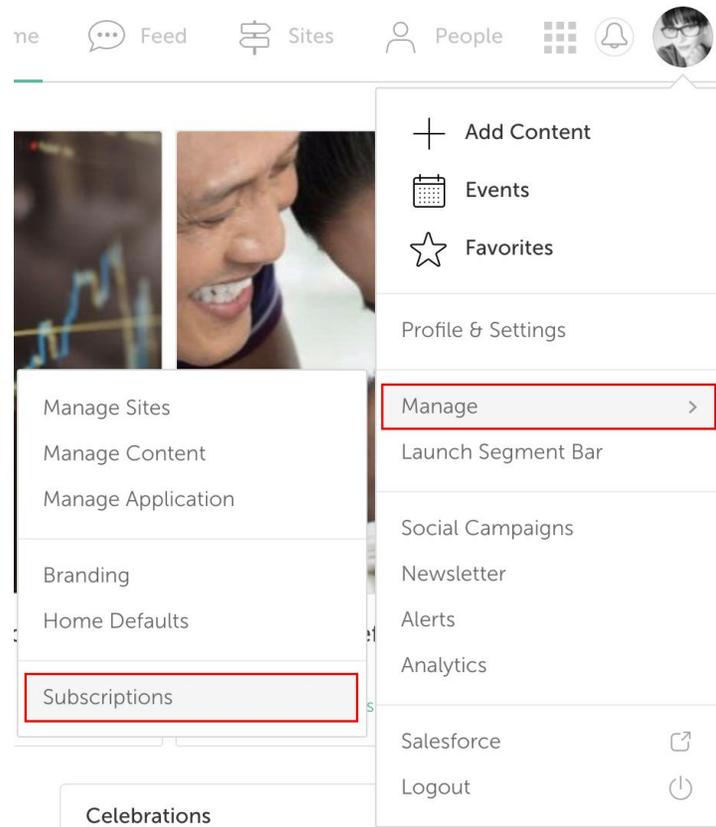
An Audience is a subset of the employees based on any combination of their Company, Department, Division, City, State, Country and Custom People Category.

- Subscriptions can be made to follow Public, Private or Unlisted Sites and all People.
- Subscriptions can be Mandatory.
- Subscriptions can be created for everyone in the organization, or can be created within a Segment

Adding Subscriptions

Subscriptions can be added from **User Menu > Manage > Subscriptions**, or from **Manage Site > Subscriptions**.





When adding a Subscription you can choose whether to create it for everyone in the organization, or to build an Audience.

Subscriptions for Everyone in the Organization

Subscriptions can be made to include everyone in the organization. This allows you to autofollow all employees to a Site or person that is relevant to everyone.

It is possible to make a Mandatory Subscription to a Site that includes everyone in the organization, meaning that no employees could unfollow that Site.

Add Subscription ✕

When a Subscription is created, the Users within the defined Audience will automatically follow the selected Sites or People.

These Users will continue to follow these Sites/People even after the Subscription is edited or deleted unless manually unfollowed.

Add a subscription for

Everyone in Organization

Select Audience

Select Sites or People to autofollow

 Sites	 People
--	---

Cancel Save

Subscriptions for an Audience

Creating a Subscription for an Audience allows you to autofollow specific groups of employees to relevant Sites and People based on their interests.

You can build an Audience from any combination of the following Profile Fields:

- Company
- Department
- Division
- City
- State
- Country
- Custom People category

For each of these fields, you can select multiple values. There is a limit of 30 values per condition.

When multiple values are selected, an “or” condition is used.

Add Subscription ✕

When a Subscription is created, the Users within the defined Audience will automatically follow the selected Sites or People.

These Users will continue to follow these Sites/People even after the Subscription is edited or deleted unless manually unfollowed.

Add a subscription for

Everyone in Organization

Select Audience

Type: ▼ Able Division ✕ ▼ ✕

Type: ▼ Abbey Ward ✕ Delhi ✕ Aberdeen ✕ ▼ ✕

Type: ▼ UK ✕ India ✕ Canada ✕ | ▼ ✕

⊕ Add another

Select Sites or People to autofollow

 Sites

 People

Cancel Save

For example:

Country: USA & UK
Department: Product & Sales

Members of the Subscription will be determined as: employees in either the USA or UK, who are also in either the Product or Sales departments.

Once the Audience is defined, you can decide whether to set the auto-follow for either Sites or People. You can then choose the Sites or People to auto-follow.

Select Sites or People to autofollow

Sites People

Search Sites...

Mandatory (Users will not be able to unfollow Sites selected in this Subscription)

Cancel Save

- When selecting a Site, you can select a checkbox to make the subscription Mandatory
 - When this is checked, employees in the subscription won't see an Unfollow button for those Sites, instead they will see the Mandatory stamp
 - If employees unfollow the Site from Chatter, the Simpplr nightly job will re-follow them to the Site (in the same way that we did previously with global Mandatory Sites)
 - This is only available for Sites, not People

When adding a Subscription from **Manage Site > Subscriptions** it's only possible to create a Subscription for that specific Site.

Adding Subscriptions when Segments are enabled

When Segments are enabled Segments can be added that build an Audience based on the Segment as well as [the Profile Fields discussed above](#). This allows you to individually tailor the experience of each Segment further.

Subscriptions can be created:

- By an App Manager
 - For any Segment
 - For everyone in the organization
- By a Segment Manager
 - For their own Segment

Subscriptions that are created will only affect the employees within that Segment. When Segments are Disabled these types of Subscriptions will be deleted (Subscriptions that have not been created based on a Segment will be retained).

Add Subscription ✕

When a Subscription is created, the Users within the defined Audience will automatically follow the selected Sites or People.

These Users will continue to follow these Sites/People even after the Subscription is edited or deleted unless manually unfollowed.

Select Audience

Segment: *
Europe ▼

AND

Type: Team ▼ Select... ▼ ✕

Select Sites or People to autofollow

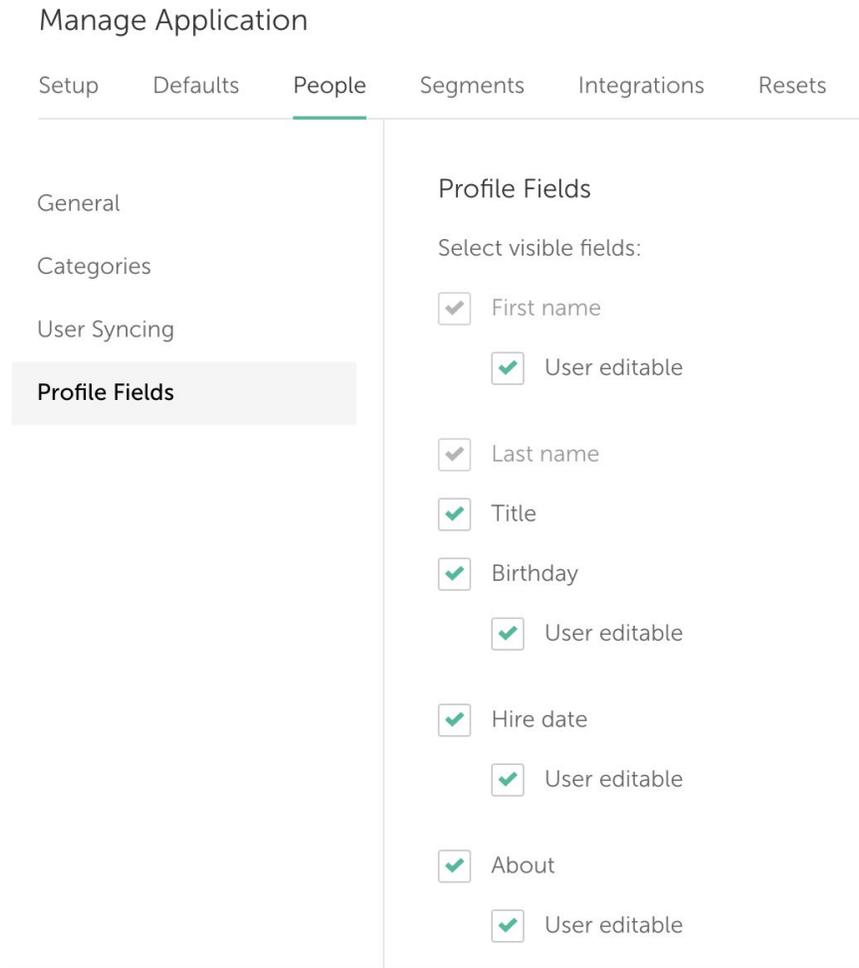
 Sites	 People
--	---

Cancel Save

Profile Fields used in Subscriptions

To avoid an employee being able to move themselves into a Private Site by editing their Profile Fields, it's only possible for Subscriptions to be built using Profile Fields that are marked as Not User Editable.

- While Profile Fields are being used for a Subscription the App Manager can not change them to be User Editable.
 - The App Manager can still edit these fields, but standard Users cannot.
- All associated Subscriptions must be deleted before the Profile Fields can be changed to User Editable



Troubleshooting Profile Fields

What to do if some of the expected Profile Fields don't appear in the dropdown of available options for creating a Subscription Audience.

Is the Profile Field User Editable?

- As [explained above](#) if a Profile Field is User Editable in **Manage Application > People > Profile Fields** then it can not be used to build an Audience for Subscriptions.

Is the Profile Field in use?

- If the Profile Field has been deselected in **Manage Application > People > Profile Fields** then it can not be used to build an Audience for Subscriptions.

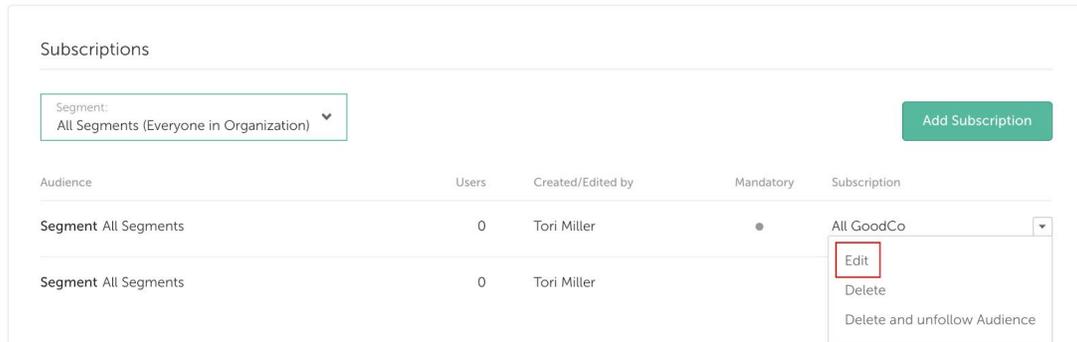
Is the Profile Field blank?

- If the Profile Field is selected and not User Editable in **Manage Application > People > Profile Fields** it may be the case that no one in the organization has any value for that Field. If it has been left blank by everyone then it can not be used to build an Audience for Subscriptions.

Editing Subscriptions

- App Managers can view, edit and delete all Subscriptions (including created by any App/Segment Manager and in any Segment)
- Segment Managers can view, edit and delete their own Subscriptions and those created by others (including App Managers), as long as they are for the Segment that they are managing
- Site Managers can view Subscriptions from all Segments for Sites that they are managing
- No other users can view, edit or delete any Subscriptions

Subscriptions can be edited by selecting Edit from the dropdown menu on any Subscriptions listing (this option will only appear if the user can edit). Clicking this option will open the Edit Subscription modal.



When editing a Subscription, only employees who are in the new Audience and were not in the old Audience will be auto-followed.

- This means that if anybody in the Subscription Audience has unfollowed the Site or Person, and the Subscription is then edited, they will remain not following and will not be made to follow the Site or Person again.

Deleting/Unfollowing Subscriptions

There are two options available when deleting a Subscription:-

- 'Delete' the Subscription so that employees will continue to follow all of the Sites and People that they were previously auto-followed to, but the Subscription will no longer take effect for new employees.
- 'Delete and unfollow Audience' so that all employees of the Audience will be unfollowed from the Site or Person that they were auto-followed to, and the Subscription will no longer take effect for new employees.

In both cases a confirmation modal will appear before deletion.

Subscriptions

[Add Subscription](#)

Audience	Users	Created/Edited by	Mandatory	Subscription
City Abbotsford	3	Adam Moore		Adell Lipkin
Division Able Division & City Abbey Ward, Delhi, Aberdeen & Country UK, India, Canada	0	Adam Moore		A - public

Edit

Delete

Delete and unfollow Audience

Delete Subscription ✕

Users will continue to follow **Adell Lipkin** unless unfollowed manually.
 Are you sure you want to delete this Subscription?
 This cannot be undone.

Cancel ✕ Delete

Delete Subscription and unfollow audience ✕

Are you sure you want to delete this Subscription and unfollow it's Audience?

1. Delete Subscription
2. Unfollow **Adell Lipkin** members who are a part of this Subscriptions Audience.
3. Does not unfollow App/Site Owner/Managers

This cannot be undone.

Cancel ✕ Delete

Mandatory Subscriptions

With the introduction of Subscriptions we've removed the concept of Mandatory Sites and replaced them with Mandatory Subscriptions.

Mandatory Subscriptions can be created for all of the employees in an organization or for a specified Audience built from Segment, Company, Department, Division, City, State, Country and Custom People Category.

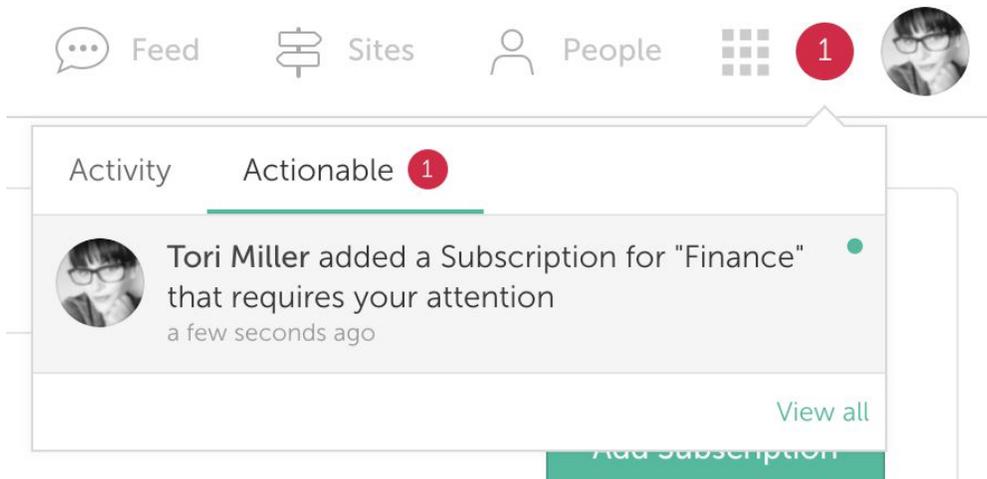
Any pre-existing Mandatory Sites will have been migrated into Mandatory Subscriptions automatically.

Subscribing to Private/Unlisted Sites

An App Manager (or Segment Manager, if Segments is enabled) can create Subscriptions to autofollow Public, Private and Unlisted Sites.

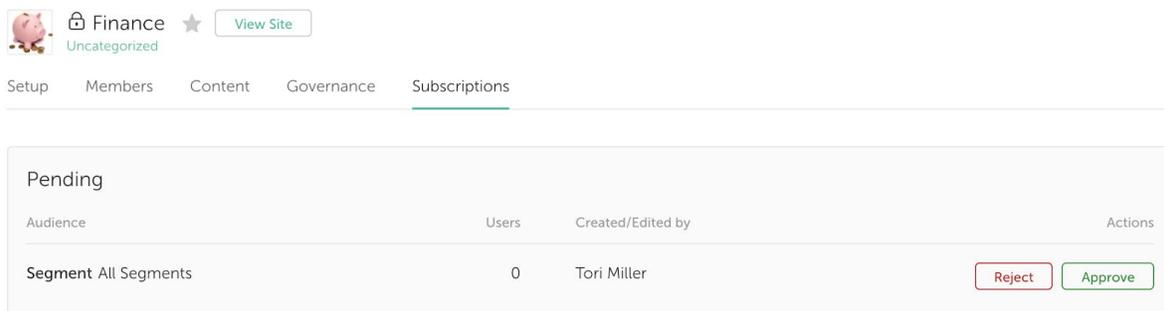
The App Manager (or Segment Manager) must be a member of an Unlisted Site before they can create a Subscription for it.

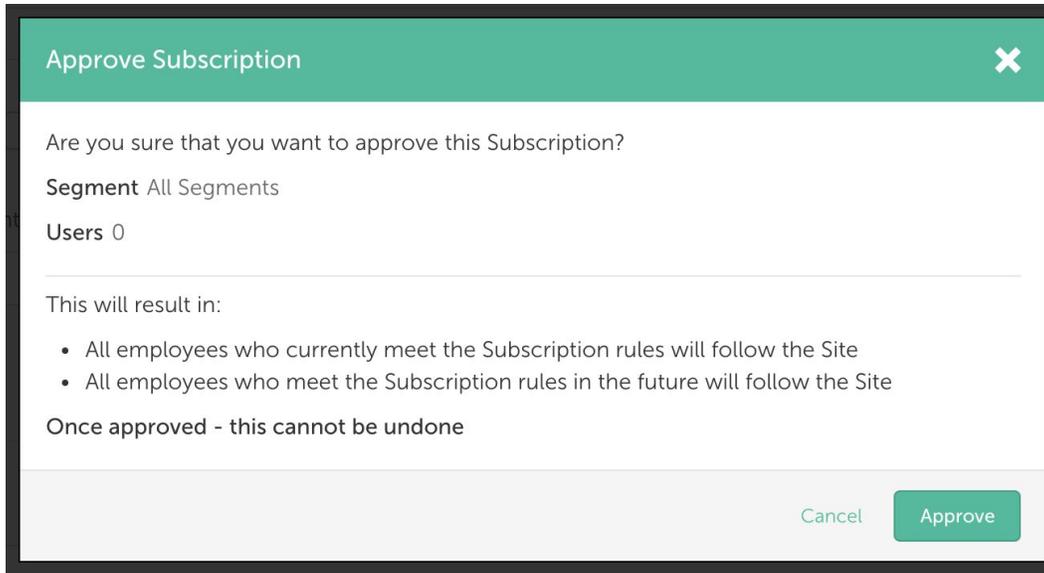
Once the Subscription is created, an approval request is generated for each Private and Unlisted Site within the Subscription.



The Site Managers of each site will receive an actionable notification. They will then need to Approve or Reject the Subscription before the Audience in the Subscription are autofollowed to the Site

- If the Segment/App Manager who sets up the Subscription is also a Site Manager of the Private or Unlisted Site then they will still receive notification and be required to Approve or Reject the Subscription
- If the sole employee in the Subscription is already a member of the Private or Unlisted Site (or if there are zero employees in the Subscription) then the Site Manager will still need to Approve or Reject the Subscription for future members of the Subscription
- As with any other Subscription, deleting the Subscription will not unfollow the employees from the Site.





Editing Subscriptions for Private and Unlisted Sites

A Subscription that contains Private or Unlisted Sites can only be edited if all of the Sites have been Approved or Rejected. If any of the Sites remain Pending the Subscription cannot be edited. However whether a Subscription is Pending or Approved it can still be deleted.

If the Subscription Audience is edited, the Subscription will go back to a state of Pending approval and the Site Manager will have to Approve or Reject again. Any employees in the Subscription who are already members of the Site will remain members.

Changing the access of a Site

If a Site moves from Private or Unlisted to Public all of the Subscriptions remain the same, there will be no change or need for further Approval (any pending Subscriptions are automatically approved).

If a Site changes from Public to Private all of the Subscriptions will go to a state of Pending and the Site Manager will have to Approve or Reject the Subscription per site. Any employees in the Subscription who are already members of the Site will remain members.

Deactivating a Site with Subscriptions

Once a Site with a Subscription to it is deactivated, the Subscription becomes Inactive.

The Subscription will still be visible in the Subscription listings, but it will be labelled as inactive for the deactivated Site.

The Subscription can be manually edited to remove the deactivated Site by an App or Segment Manager.

Locked Subscriptions

Subscriptions can exist in a "locked" state. A subscription enters this state temporarily if some processing is happening on it (e.g adding new members to a site). This might be after it has been created or edited or during batch processing. A locked subscription cannot be edited or deleted.

Reverting a Site to a Chatter Group

If a Site is reverted to a Chatter Group the Subscription for that site becomes Inactive

- New employees who meet the Subscriptions rules will not follow
- The Subscription will be labelled Inactive for this Site in Subscriptions listings

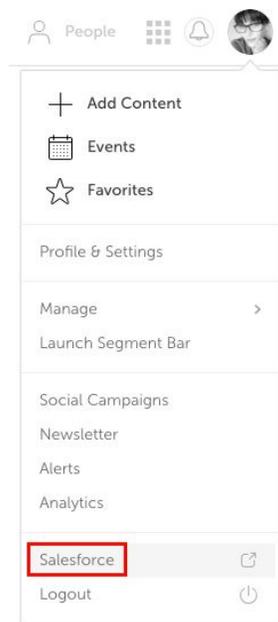
- The Subscription can be edited to remove the reverted Site but this must be done manually by an App or Segment Manager
- The Subscription will remain linked to the Chatter Group, if the Chatter Group is converted back to a Simpplr Site the Subscription will become active again automatically (as long as it has not been deleted).

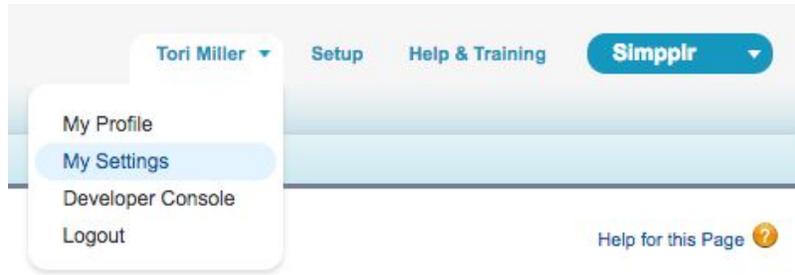
Notifications for People Subscriptions

Currently if an employee has agreed to receive notification emails from Chatter for Follows, they will receive an individual email for each person who Follows them. This could cause problems if a Subscription is created for hundreds, or thousands of people to follow them at one time; the result would be the same number of separate emails being sent through at one time.

The only way to avoid people receiving multiple notification emails when a Subscription is made for them is to change their Chatter email notifications to deselect 'Follows me'. This process will need to be done for each employee who has a Subscription created for them.

This can be done by going to **Salesforce**, then **My Settings > Chatter > Email Notifications**





Home Chatter Files Libraries Simplr +

Quick Find 🔍

- My Settings**
- Personal
- Display & Layout
- Email
- Chatter**
- My Feeds
- Email Notifications**
- Calendar & Reminders
- Desktop Add-Ons

Email Notifications

Chatter can email you when someone follows you, posts to your profile or groups, and more. You

Save **Cancel**

General

Receive emails ⓘ

▼ Personal

Email me when someone:

- Follows**
Follows me
- Posts or Likes**
Posts on my profile
Shares a post I made (Salesforce Classic only)
Likes a post or a comment I made