



CPPPF

Content & Public Posts Filter

Installation & Admin Guide

Version 1.3

Table of Contents

TABLE OF CONTENTS	2
LICENSE	3
WELCOME	4
EXAMPLE USAGE	5
INSTALLATION	7
ENABLE PUBLIC POST FILTERING	8
PUBLIC POST FILTERING OPTIONS.....	11
ENABLE CONTENT FILTERING	13
CONTENT FILTERING OPTIONS	18
ADDITIONAL CONSIDERATIONS	20
UNINSTALL	21
TROUBLESHOOTING.....	22

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Welcome

Thank you for choosing to install the Content and Public Posts Filter!

We'll briefly go over the product's installation, and then go into what steps are required to start using CPPF.

CPPF is designed to allow you to have more control over who can post to public groups and auto-moderate content. It will let you do the following:

- * Warn users that they're posting to a public feed
- * Block users from posting to a public feed
- * Allow users to freely post to just one or two public feeds
- * Allow select users/profiles to always post to a public feed
- * Warn users that their post/comment contains inappropriate language
- * Block users from posting/commenting with inappropriate language
- * Allow select users/profiles to always bypass the filter
- * Offer suggested alternate words to the user
- * Works in Lightning and Classic

As no filtering solution is perfect, we give you the option to let users override these filters by acknowledging them. Your users can also rest easy knowing that they're not being actively monitored, as we do not store any logs or send alerts when the filter is tripped, and can even remove the filter acknowledgement messages from postings.

The public post filter and the content filter work independently from each other. You can disregard either one if it does not meet your needs.

Example Usage

The following are some example use cases. While we're going with some light, fun examples here, you can imagine more egregious phrases instead.

The screenshot shows a social media post creation interface. At the top, there are tabs for 'Post', 'Poll', and 'Question'. Below the tabs is a red warning box that says 'Review the errors on this page.' Below the warning box is a red message that says 'You are attempting to post a message to a public feed. Are you sure you want to do this? Add 'OKPUBLIC' to your post and submit it again.' Below the message is a text input field containing the text 'Investigate why we're under performing by 8% on the Johnson account. We normally do much better than that.' Below the text input field is a rich text editor toolbar with buttons for bold, italic, underline, strikethrough, text color, bulleted list, numbered list, insert image, link, emoji, and user mention. Below the toolbar is a 'To' field with the text 'My Followers'. Below the 'To' field is a link icon. Below the link icon is a red message that says 'Saving Failed' and a blue 'Share' button. Below the 'Share' button is a small text that says 'To link to a record, enter / then start typing the record name.'

Public Post Warning

The screenshot shows a social media post creation interface. At the top, there are tabs for 'Post', 'Poll', and 'Question'. Below the tabs is a red warning box that says 'Review the errors on this page.' Below the warning box is a red message that says 'Branding has recently changed, and you're using an outdated brand name. Are you sure you want to post this? Add 'OKCONTENT' to your post and try again. Phrase: Community Cloud - New Branding: Experience Cloud' Below the message is a text input field containing the text 'Does anyone know how to use community cloud?'. Below the text input field is a rich text editor toolbar with buttons for bold, italic, underline, strikethrough, text color, bulleted list, numbered list, insert image, link, emoji, and user mention. Below the toolbar is a 'To' field with the text 'My Followers'. Below the 'To' field is a link icon. Below the link icon is a red message that says 'Saving Failed' and a blue 'Share' button. Below the 'Share' button is a small text that says 'To link to a record, enter / then start typing the record name.'

Reinforce Rebranding Efforts

Post
Poll
Question

Review the errors on this page.

You are attempting to post a message with a questionable phrase. Are you sure you want to do this? Add 'OKCONTENT' to your post and try again. Phrase: nerf herder - Alternative phrases: livestock farmer

You're a scruffy-looking nerf herder!

B

I

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↺

I_x

☰

☷

🖼️

🔗

😊

👤

To link to a record, enter / then start typing the record name.

To My Followers

🔗

Saving Failed

Share

Encourage more inclusive language

Post
Poll
Question

Review the errors on this page.

You are attempting to post a message with a blocked phrase. Please reconsider your post. Phrase: Sassy - Reason: Trademark infringement

Did anyone see Sassy at the world tour?

B

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😊

👤

To link to a record, enter / then start typing the record name.

To My Followers

🔗

Saving Failed

Share

Filter out offensive or questionable words

Installation

Installation

CPPF is installed via the Salesforce AppExchange. You can install it in a sandbox or production. We recommend testing in a sandbox first.

Early in the install process, Salesforce will ask if you wish to install the software for admins only, all users or specific profiles. Select admins only and continue the install process.

Note: This question will determine who automatically gets assigned the bypass filter permissions. If you selected all users, then all the users would get the bypass permission and the filter wouldn't do anything. This is all easily changeable after installation by going into the appropriate profile and enabling or disabling the ContentFilterPublicOverride and ContentFilterContentOverride custom permissions.

Migrating the custom metadata records, permission set assignments or filtered word objects from a sandbox to production is a two step process. First, install the software in production from the AppExchange. Then, migrate the metadata and records.

The software is installed with filtering turned off by default. You will need to do additional configuration steps in order to enable filtering.

Enable Public Post Filtering

This section discusses how to enable and configure the public post filter. If you wish to configure content settings, go to the section [Enable Content Filtering](#).

The public post filter only applies to newly created posts in a public group. It does not apply when editing the post or leaving a comment.

Enable the Public Post Filter

Filtering is controlled and configured through a Custom Metadata Type record.

Go into Setup and search for Custom Metadata Types.

Find the record type called “Content Filter Setting” and click the “Manage Records” link. You should see a Default record. Click Edit. Click the checkbox for “Public Post - Enable Filter” and Save. Filtering will now be enabled.

Note: Although you can create multiple custom metadata records for the public post filter, only the first one the system finds with the Public Post - Enable Filter checkbox checked will be used. To avoid confusion on which record is in use, only enable the filter in one custom metadata record. We also recommend using the same record for the public post and content filter settings.

Content Filter Setting Edit

Save

Save & New

Cancel

Information

Label

Default

Content Filter Setting Name

Default

i

Public Post - Enable Filter

☐

Public Post - Public Group Warning

☒

Public Post - Warning Message

You are attempting to post

Public Post - Override Text

OKPUBLIC

Public Post - Strip Override Text

☒

Public Post - Bypass 1

Public Post - Bypass 2

Save

Save & New

Cancel

Custom Metadata Record - Filter is not enabled

Bypass Permission

Any user with the bypass permission will not be prompted, and thus not filtered, when posting to a public feed.

To change the bypass filter at the profile level:

Go into Setup and click on Profiles. Select the profile to modify. Go to the Enabled Custom Permissions section. Click edit and add or remove the ContentFilterPublicOverride permission. Note that the profiles selected during installation will already have this permission enabled (such as the System Administrator).

Enabled Custom Permissions Edit	
Custom Permission Name	
<u>Content and Public Posts Filter.cppf.ContentFilterContentOverride</u>	
<u>Content and Public Posts Filter.cppf.ContentFilterPublicOverride</u>	

This profile will bypass the filter

To change the bypass filter at the permission set level:

We have included a permission set called “Public Post Filter Override”. Any user (or profile) that contains this permission set will be bypassed. You may want to assign this to any integration or automation user.

Public Post Filtering Options

This section discusses how to customize the public post filter. If you wish to configure content settings, go to the section [Content Filtering Options](#).

Public Post - Public Group Warning

The default filter will warn/block public posts on the Company Highlights and user profile feeds only. If you also want to warn or block posts made in any public group, check this box.

Public Post - Warning Message

This is the warning message displayed to the end user when trying to post. You may want to include the override text in this message, so that the user knows how to post their message.

Public Post - Override Text

If the user puts this string of characters in their post, they will be allowed to post the message. It is case insensitive. Be sure to use a phrase the user isn't likely to type in through normal speech. If you do not put any text in here, then the user will not be able to override, and you will disable public postings entirely (except for posts to the bypass 1 and bypass 2 groups, or anyone with the public post override permission).

Public Post - Strip Override Text

If you want to automatically remove the override text, check this box. Note that the original, unadulterated message will not be preserved. If the user types in the override text multiple times, only 1 instance of it will be removed.

Public Post - Bypass 1

Bypass the public post filter for this group. All users will be able to post without needing to specify an override. Enter the group's 18 character ID. If you enable the Switch to Classic feedback form, you'll probably want to include that group in this setting, as that functionality posts to a public chatter group.

Public Post - Bypass 2

Bypass the public post filter for this group. All users will be able to post without needing to specify an override. Enter the group's 18 character ID.

Enable Content Filtering

This section discusses how to enable and configure the content filter. If you wish to configure content settings, go to the section [Enable Content Filtering](#).

The content filter applies to all posts and comments, including edits.

Enable the Content Filter

Filtering is controlled and configured through a Custom Metadata Type record.

Go into Setup and search for Custom Metadata Types.

Find the record type called “Content Filter Setting” and click the “Manage Records” link. You should see a Default record. Click Edit. Click the checkbox for “Content - Enable Filter” and Save. Filtering will now be enabled.

Note: Although you can create multiple custom metadata records for the public post filter, only the first one the system finds with the Content - Enable Filter checkbox checked will be used. To avoid confusion on which record is in use, only enable the filter in one custom metadata record. We also recommend using the same record for the content filter and public post settings.

Namespace Prefix	cppf
Content - Enable Filter ?	☐
Content - Warning Message ?	You are attempting to post
Content - Blocked Message ?	You are attempting to post
Content - Alternate Message ?	- Alternative phrases:
Content - Always Show Alternate Text ?	☐
Content - Override Text ?	OKCONTENT
Content - Strip Override Text ?	☒

Custom Metadata Record - Filter is not enabled

Bypass Permission

Any user with the bypass permission will not be prompted, and thus not filtered, when posting or commenting.

To change the bypass filter at the profile level:

Go into Setup and click on Profiles. Select the profile to modify. Go to the Enabled Custom Permissions section. Click edit and add or remove the ContentFilterContentOverride permission. Note that the profiles selected during installation will already have this permission enabled (such as the System Administrator).

Enabled Custom Permissions Edit	
Custom Permission Name	
<u>Content and Public Posts Filter.cppf.ContentFilterContentOverride</u>	
<u>Content and Public Posts Filter.cppf.ContentFilterPublicOverride</u>	

This profile will bypass the filter

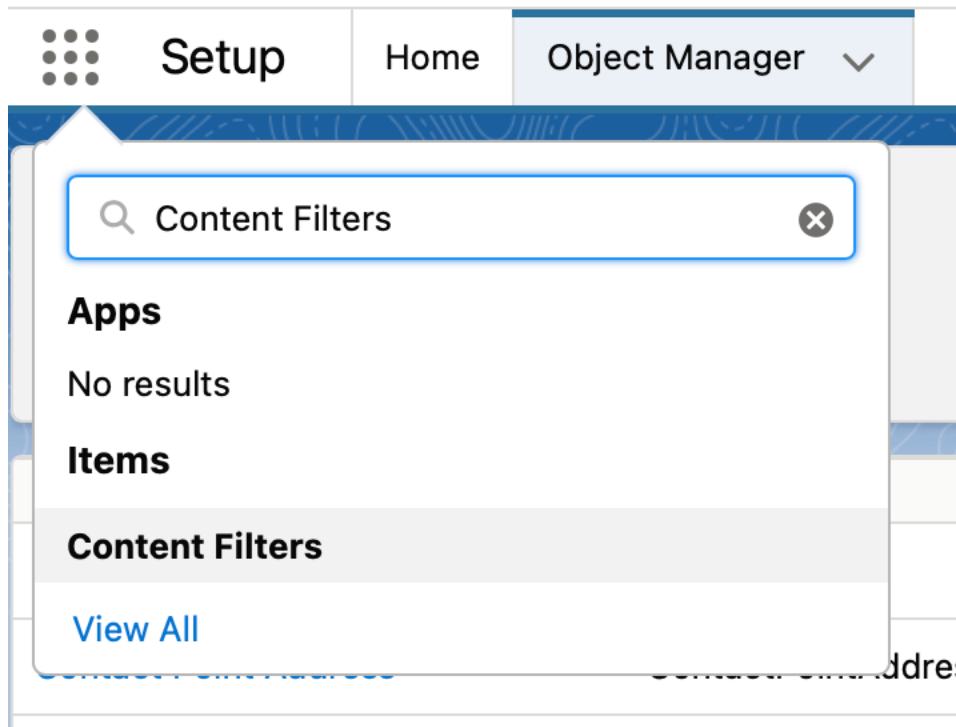
To change the bypass filter at the permission set level:

We have included a permission set called “Content Filter Override”. Any user (or profile) that contains this permission set will be bypassed. You may want to assign this to any integration or automation user.

Content Filter Words

Now that filtering is enabled, you will need to create your list of warning or blocked phrases. These are handled by creating Content Filter records (API name `cppf__Content_Filter__c`). Go to the Content Filter tab from the app launcher.

Note: Admins can choose to enable or disable access to the Content Filter tab, object and fields. You may want to allow all users to see, but not edit, the content filters. You can control access via standard profiles and permission set assignments. The content filter will be able to use all the records you create, regardless of user access controls, so you don’t need to open up read-only access to anyone.



Find the content filters from the app launcher

To create a new phrase, just click the new button.

A screenshot of the 'New Content Filter' form in Salesforce. The form is divided into two main sections: 'Information' and 'System Information'. In the 'Information' section, there is a 'Warn or Block' dropdown menu set to 'Warn', a 'Phrase' text input field, and an 'Alternate Suggestions' text input field. The 'System Information' section shows the 'Owner' as 'Mike DeMaria'. At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Content filter words are just like any other Salesforce record

The phrase is required. This is a word that the content filter will check against. Each word you want to scan for should have its own record. Keep in mind that we need to check the post for every record you set, so the more phrases to check, the more processing time it will take to scan.

Note: Depending on how many other triggers and automation are in place, having a very large list of phrases could cause governor limit issues. If you're running into governor limits, consider paring down the list of phrases.

Warn or Block is a picklist for what to do when the phrase is encountered. If a record is set to 'warn', the user is given a warning message, but you can allow them to override. Block will prevent all users from using the word. Ignore is literally ignored by the content filter. Use this to temporarily disable a phrase from scanning, or for staging purposes.

If you never want to use the 'warn' feature, only create records with the block status.

Conversely, if you never want to use the 'block' feature, only create records with the warn status.

The alternative suggestions field will be displayed to a user who tries to use a warned or blocked phrase. If you leave this field blank, no alternative phrases will be presented. You could also use this field to communicate to the user why a phrase is on the filter list.

The record ownership can be changed, but is irrelevant from the filter's perspective.

You can import and export the `cppf__Content_Filter__c` records with Data Loader, SFDX or Apex code.

Content Filtering Options

This section discusses how to customize the content filter. If you wish to configure public post settings, go to the section Public Post Filtering Options.

Content - Warning Message

This is the warning message displayed to the end user when trying to post. You may want to include the override text in this message.

Content - Blocked Message

This is the blocked content message displayed to the end user when trying to post. Users cannot override a blocked phrase unless they have the bypass filter permission.

Content - Alternate Message

Phrases can have alternate words presented to the user. The text specified in this field will appear before the alternative words. We will automatically add a space inbetween this text and the alternate words. If you don't specify an alternative word, this text will not appear (unless you enable the always show alternate text option).

Content - Always Show Alternate Text

Always displays your alternate text as listed in the custom metadata record. This allows you to sandwich the warn/blocked phrase. Even if the alternate phrase is blank on the record, your alternate message text from the custom metadata record will still display. This could allow you to display a warning message, the word that tripped the filter, then followup text.

Content - Override Text

If the user puts this string of characters in their post, they will be allowed to post the message. It is case insensitive. Only phrases marked as 'Warn' can be overridden. Be sure to use a phrase the user isn't likely to type in through normal speech. If you do not put any text in here, then the user will not be able to override, and you will effectively be turning all warning words into blocked words (except for anyone with the filter override permission).

Content - Strip Override Text

If you want to automatically remove the override text, check this checkbox. Note that the original, unadulterated message will not be preserved. If the user types in the override text multiple times, only 1 instance will be removed.

Additional Considerations

The filter will check for the public post setting first, then check for content. The public post check will operate at the same speed regardless of the size of your block list.

The content filter is intended to be a 'good enough' effort, not necessarily perfect. While we want to capture most uses of the phrases in question, we also expect you to be able to handle users who try to get around the system.

Partial word matches are not supported. We only look for whole words.

The content filter does not log when a user unsuccessfully attempts to make a blocked post, a warned post or a public post. We choose not to develop that feature. To confirm that a user agreed to the warning, uncheck the strip override text feature.

We recommend using the alt text to guide the user towards better phrasing where applicable. Feel free to experiment with the combinations of warning messages, alt text and the 'always show alternate text' setting.

The phrases in the content filter records cannot start with a space. As such, we automatically put a space between the warn/block phrase, the word in question, the alt message and the alt text from the records when it is displayed to the user.

The blocked/warned word is always shown to the user.

When the user is warned or blocked, it is surfaced to the user via an Apex generated error message. These records are not saved until the user overrides (or modifies their message) and posts again.

Uninstall

If you wish to temporarily turn off the public post filter, uncheck the “Public Post - Enable Filter” checkbox in the custom metadata record.

If you wish to temporarily turn off the content filter, uncheck the “Content - Enable Filter” checkbox in the custom metadata record.

To uninstall the entire package, go into Setup - Installed Packages. Find the package labelled “Content and Public Posts Filter” and click the Uninstall link. As per Salesforce’s standard package uninstaller, you can choose to retain a copy of the package’s data for 48 hours. The Content Filter records will also be deleted. All existing Chatter posts and comments are unaffected, and will remain as they were.

Troubleshooting

If you can post to a public feed, and think you shouldn't be able to:

- Ensure that Public Post - Enable Filter is enabled
- Ensure that your post doesn't contain the override phrase
- Ensure that the custom permission 'ContentFilterPublicOverride' is not assigned to the profile
- Ensure the permission set 'Public Post Filter Override' is not assigned
- Although you can create multiple CMT records, only 1 should be marked as enabled at a time.

If you can post a warn or block phrase, and think you shouldn't be able to:

- Ensure that Content - Enable Filter is enabled
- Ensure that your post doesn't contain the override phrase (only applies to warn words)
- Ensure that the custom permission 'ContentFilterContentOverride' is not assigned to the profile
- Ensure the permission set 'Content Filter Override' is not assigned
- Ensure the phrase is set to either 'Block' or 'Warn'. The ignore setting is there for staging or temporarily removing it from the list of filtered words. The filter ignores the ignores.
- If the user is posting to a public feed, the content filter does not run until the user confirms they're ok with a public post.
- The content filter stops at the first word found. Blocked phrases are searched before Warn phrases.
- Although you can create multiple CMT records, only 1 should be marked as enabled at a time.

If you have any other trouble, please reach out to us at cppf@nand.net

Thank you for using our software!