



IMPORTING ARTICLES INTO SALESFORCE KNOWLEDGE

Summary

Salesforce Knowledge allows you to import your existing articles and their translations with one file for each article type. This document is intended for Salesforce Knowledge administrators. It is a step-by-step guide to importing into your Salesforce KnowledgeBase.

Introduction to Importing Articles

You can import your existing articles and their translations into Salesforce Knowledge. This importer is for articles and translations you currently have outside Salesforce Knowledge.

 **Note:** If you are looking for instructions on importing translated articles that you've sent to a localization vendor, see "Importing Article Translations" in the Salesforce Help.

After setting up Salesforce Knowledge, complete the tasks below to import articles:


1. Preparing Articles for Import to Salesforce Knowledge
2. Creating a .csv File for Article Import
3. Specifying Parameters for Article Import
4. Creating a .zip File for Article Import
5. Viewing Salesforce Knowledge Import and Export Status

Preparing Articles for Import to Salesforce Knowledge

 **Important:** You must import articles one article type at a time.


To prepare articles for importing:

1. Sort your existing articles by information type. For example: FAQ, product information, or offer.
2. Ensure that each information type has a corresponding Salesforce Knowledge article type that matches its structure and content. For example, if you are importing FAQs, ensure that Salesforce Knowledge has an FAQ article type with enough question and answer fields to accommodate the largest FAQ article.

 **Note:** The article importer does not support sub-fields. If you have fields within fields, you'll need to adjust your structure and content before importing into Salesforce Knowledge.

3. Verify that the article's field-level security settings allow you to edit the fields.


If your articles contain .html files, use an article type that contains a rich text area field and ensure that the HTML is compliant with the tags and attributes supported in the rich text area field.

 **Tip:** Test your import using a small set of articles.

Creating a .csv File for Article Import


Each .csv file imports articles into one article type and maps the imported articles' content with the article type's fields. For example, a .csv file might map articles' titles with the standard field `Title` in an article type, meaning that each article's title is imported into the `Title` field.

1. Create one .csv file per article type.
 - There can only be one .csv file and one .properties file.
 - The .csv file and the .properties file must be in the root directory.
 - The compression process must preserve the folder and subfolder structure.
 - The .zip file name can't contain special characters.
 - The .zip file can't exceed 10 MB and the uncompressed files can't exceed 100 MB.
 - .csv files can't have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations.
 - .csv file rows can't exceed 400,000 characters.
 - .csv file cells can't exceed 32 KB.
 - Each article in the .csv file can't have more than 49 translations.
2. In the first row, specify the article type's fields and metadata (such as language data categories or channels). Enter one item in each column. You can use the following fields and metadata to import content:
 - `isMasterLanguage`—identify the article as a master (1) or translation (0). Required to import articles with translations, however, it can't be in a .csv file to import articles without translations. Translations must follow their master articles so that they are associated with the master article preceding it.
 - `Title`—the article or translation's title. Required for all imports.
 - Standard or custom fields—refer to an article type's standard fields using field names and refer to custom fields using API names. Leaving a row cell empty may cause your articles to be skipped if the related article-type field is mandatory.
 - Rich text area field—use the rich text area custom fields to import .html files or images. Refer to an article type's rich text area field using its API name.
 - File field—use the file custom fields to import any file type (.doc, .pdf, .txt, etc.). Refer to an article type's file field using its API name.
 - To categorize the imported articles, use category groups; refer to a category group using its unique name prefixed with `datacategorygroup`. For example, use `datacategorygroup.Products` to specify the category group Products.
 - To specify where the imported articles are available, use the keyword `Channels`.
 - Language—specify the articles' language. Required to import articles with translations. Optional to import articles without translations. If you don't include this column, the articles will automatically belong to the default knowledge base language and you can't import translations along with the master articles.
3. In subsequent rows, specify the articles you want to import. Use one row per article and enter the appropriate information in each article type field column or metadata column.
 - Standard or custom fields—enter the articles' data for each field, except for rich text area fields where you must enter the relative path to the corresponding .html file in your .zip file.

 **Note:** The article importer does not support sub-fields. If you have fields within fields, you'll need to adjust your structure and content before importing into Salesforce Knowledge.

- Rich text area field—always enter the .html file path relative to the location of the .csv file. Never enter raw text. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing HTML and images:
 - We recommend that you create separate folders for the .html files (for example, /data) and the images (for example, data/images).
 - To import images, include the images in an .html file using the tag and src attribute. Ensure that the src value is a relative path from the .html file to the image folder.
 - Images must be .png, .gif, or .jpeg files.
 - Each image file can't exceed 1 MB.
 - .html files can't exceed the maximum size for their field.
 - If a date doesn't match the date format specified in the property file, the related article isn't imported.
 - If an .html file references a file that isn't allowed, the related article isn't imported.
 - If an .html file references an image that's missing, the related article is imported without the image.
- File field—enter the path relative to the file's location. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing files:
 - We recommend that you create a folder for your files (for example, /files).
 - Each file must not exceed 5 MB.
- Category groups—use category unique names to categorize articles. Use the plus symbol (+) to specify more than one category. For example, Laptop+Desktop. Note the following information about data category groups:
 - Leaving the cell row empty causes your article to be set to No Categories.
 - If you specify a category and its parent (for example, Europe+France) the import process skips the child category France and keeps the parent category Europe, because application of a parent category implicitly includes the category's children.
 - When importing articles with translations and associated data categories, only the master article retains the data categories. The article translations have no associated data category upon import.
- Channels—specify articles' channels using the keywords:
 - application for Internal App. If you don't specify a channel, application is the default.
 - sites for Public Knowledge Base.
 - csp for Customer.
 - prm for Partner.

Use the plus (+) symbol to specify more than one channel (for example, application+sites+csp to make an article available in all channels).

 **Note:** When importing articles with translations and associated channels, only the master article retains the channels. The article translations have no associated channels upon import.

The following example .csv files import articles in a Product Offer article type. The first example is for imports of articles without translations. The second is for imports with translations. The .csv files contain

titles, summaries, and descriptions. They also classify the articles in the category group Products and make them available for specific channels. The `description__c` field is a rich text area and only supports paths to .html files. The `summary__c` field is a text field and only supports raw text. The “Best Desktop Computer Deals” article has no summary; the cell is left blank because the `summary__c` field is not mandatory.

| Title | summary__c | description__c | datacategorygroup .Products | Channels |
|--------------------------------------|-----------------------------|---------------------|--------------------------------|-----------------|
| Free Digital Camera Offer | Get the new Digital Camera. | data/freecam.html | Consumer_Electronics | application+csp |
| Best Desktop Computer Deals | | data/bestdeals.html | Desktop | application+csp |
| Free Shipping on Laptop and Desktops | | data/freeship.html | Laptop+Desktops | application+csp |

Example `articlesimport.csv` file:

```
Title,summary__c,description__c,datacategorygroup.Products,Channels
Free Digital Camera Offer, Get the new Digital Camera., data/freecam.html,Consumer_Electronics,application+csp
Best Desktop Computer Deals,, data/bestdeals.html,Desktop,application+csp
Free Shipping on Laptop and Desktops,, data/freeship.html,Laptop+Desktops,application+csp
```

| isMaster Language | Title | summary__c | description__c | datacategorygroup .Products | Channels | Language |
|----------------------|---|---|------------------------|--------------------------------|-----------------|----------|
| 1 | Free Digital Camera Offer | Get the new Digital Camera. | data/freecam.html | Consumer_Electronics | application+csp | en_US |
| 0 | Libérer l'Offre d'Appareil photo digital | Obtenir le nouvel Appareil photo digital. | data/freecam/fr.html | | | fr |
| 0 | Liberte Oferta Digital de Cámara | Consiga la nueva Cámara Digital. | data/freecam/es.html | | | es |
| 1 | Best Desktop Computer Deals | | data/bestdeals.html | Desktops | application+csp | en_US |
| 0 | Meilleures Affaires d'ordinateurs de bureau | | data/bestdeals/fr.html | | | fr |
| 0 | Mejores Tratos de ordenadores | | data/bestdeals/es.html | | | es |
| 1 | Free Shipping on Laptops and Desktops | | data/freeship.html | Laptops+ Desktops | application+csp | en_US |
| 0 | Libérer Affranchissement sur | | data/freeship/fr.html | | | fr |

| isMasterLanguage | Title | summary__c | description__c | datacategorygroup.Products | Channels | Language |
|------------------|---|------------|-----------------------|----------------------------|----------|----------|
| | Portables et Ordinateurs | | | | | |
| 0 | Liberte Franqueo en Laptops y Ordenadores | | data/freeship/es.html | | | es |

Example `articlestranslationsimport.csv` file:


```
isMasterLanguage,Title,summary__c,description__c,datacategorygroup.Products,Channels,Language
1,Free Digital Camera Offer,Get the new Digital Camera,data/freecam.html,Consumer_Electronics,application+csp,en
0,Libérer l'Offre d'Appareil photo digital,Obtenir le nouvel Appareil photo digital.,data/freecam/fr.html,,,fr
0,Liberte Oferta Digital de Cámara,Consiga la nueva Cámara Digital.,data/freecam/es.html,,,es
1,Best Desktop Computer Deals,,data/bestdeals.html,Desktops,application+csp,en
0,Meilleures Affaires d'ordinateurs de bureau,,data/bestdeals/fr.html,,,fr
0,Mejores Tratos de ordenadores,,data/bestdeals/es.html,,,es
1,Free Shipping on Laptop and Desktops,,data/freeship.html,Laptops+Desktops,application+csp,en
0,Libérer Affranchissement sur Portables et Ordinateurs,,data/freeship/fr.html,,,fr
0,Liberte Franqueo en Laptops y Ordenadores,,data/freeship/es.html,,,es
```


Specifying Parameters for Article Import

Specify import parameters in a property file using key names and corresponding values. For example, use the key `DateFormat` to specify that a date custom field appears in the `DateFormat=dd/MM/YYYY` format or specify the character encoding to be used for the import.

Create a file with the `.properties` extension and specify the required parameters, as described in this table.

| Key | Description | Default Value |
|-----------------------------|---|----------------------------------|
| <code>DateFormat</code> | Format of the date to read in the <code>.csv</code> file | <code>yyyy-MM-dd</code> |
| <code>DateTimeFormat</code> | Format of the date and time to read in the <code>.csv</code> file | <code>yyyy-MM-dd HH:mm:ss</code> |
| <code>CSVEncoding</code> | Character encoding used to read the <code>.csv</code> file | <code>ISO8859_15_FDIS</code> |
| <code>CSVSeparator</code> | <code>.csv</code> file separator | <code>,</code> |
| <code>RTAEncoding</code> | Default encoding used for the HTML files (if not specified in the | <code>ISO8859_15_FDIS</code> |

| Key | Description | Default Value |
|-----|--|---------------|
| | <p>charset attribute from the HTML meta tag).</p> <p> Note: Salesforce does not support UTF-32 character encoding. We recommend using UTF-8. If you use specify UTF-16 character encoding, ensure your HTML files specify the right byte-order mark.</p> | |

 **Note:** You must specify only Java date formats. Make sure the date format is not misleading. For example, if you choose the format yyyy-M-d, a date entered as 2011111 can be interpreted as 2011-01-11 or 2011-11-01. Specify at least :

- Two digits for month and day format (MM, dd)
- Four digits for year format (yyyy)

If a date in the .csv file does not match the date format specified in the property file, the related article is not imported.

Example offerarticlesimport.properties property file:

```
DateFormat=yyyy-MM-dd
DateTimeFormat=yyyy-MM-dd HH:mm:ss
CSVEncoding=ISO8859_15_FDIS
CSVSeparator=,
RTAEncoding=UTF-8
```

Creating a .zip File for Article Import

To complete the import, create a .zip file containing:

- The .csv file.
- The folder containing the .html files to import.
- The folder containing the image files referenced in the .html files.
- The .properties file.

The import .zip file must meet the following requirements:

- There can only be one .csv file and one .properties file.
- The .csv file and the .properties file must be in the root directory.
- The compression process must preserve the folder and subfolder structure.
- The .zip file name can't contain special characters.
- The .zip file can't exceed 10 MB and the uncompressed files can't exceed 100 MB.

- .csv files can't have more than 10,000 rows, including the header row. Therefore, you can have a maximum of 9,999 articles and translations.
- .csv file rows can't exceed 400,000 characters.
- .csv file cells can't exceed 32 KB.
- Each article in the .csv file can't have more than 49 translations.

Upload your .zip file:

1. From Setup, enter *Import Articles* in the **Quick Find** box, then select **Import Articles**.
2. Select the appropriate **Article Type** for the imported articles.
3. Click **Browse** to select the .zip file, and click **OK**.
4. If your import contains translations, select the **Contains translations?** checkbox.



Note: If this checkbox is selected, your .csv file must contain the `isMasterLanguage`, `Title`, and `Language` columns. If this checkbox is not selected, your csv file can't contain the `isMasterLanguage` column but must contain the `Title` column. The `Language` column is optional for imports of articles without translations.

5. Click **Import Now**.

When the import is complete you receive an email with an attached log that provides details about the import.

Viewing Salesforce Knowledge Import and Export Status

To check the status of your imports and exports, from Setup, enter *Article Imports* in the **Quick Find** box, then select **Article Imports**. If you've enabled multiple languages for Salesforce Knowledge, you see two tables: one for article and translation imports and another for exports for translation.

Import information includes:

- Possible actions
- .Zip file names
- Who submitted it and when
- Status
- Started and completed dates
- Article types

Export information includes:

- Possible actions
- Zip file names
- Who submitted it and when
- Status
- Started and completed dates

Status descriptions are as follows:

| Status | Description | Possible Action |
|------------------|---|---|
| Pending | The import or export will start as soon as the previous pending import or export completes. | You can click Cancel to cancel the import or export. |
| Processing | The import or export is processing. | If you want to stop the process, or if the process has been stopped, call Salesforce Support. Salesforce may stop an import or export if a maintenance task has to be performed or the import or export exceeds one hour. |
| Stopping/Stopped | Salesforce Support is stopping or has already stopped the import or export. | Contact Salesforce Support to restart the import or export, or click Cancel to cancel an entry. |
| Aborted | The import or export has been canceled. The articles that already imported or exported successfully are available in Salesforce. | You can restart an import or export, click Del to delete an entry, or click Email Log to receive the completion email and check the details of your import or export. |
| Completed | The import or export is complete. Successfully imported articles are visible on the Article Management tab on the <code>Articles</code> subtab. Successfully imported translations are visible on the Article Management tab on the <code>Translations</code> subtab. | Note that this status doesn't mean the import or export is successful. Click Email Log to see the log file attached to the completion email and check the details of your import or export. Click the exported .zip file name to save or open the file on your system. |