SETTING UP SALESFORCE KNOWLEDGE

Summary

Salesforce Knowledge enhances your customer service. A knowledge base lets you create and manage custom articles that can be easily shared with your Salesforce Knowledge users, customers, partners, and website visitors. Setting up Salesforce Knowledge is relatively easy but requires a large amount of planning. This document assumes you have already created an implementation plan.

Introduction to Implementing Salesforce Knowledge

This document is intended for Salesforce Knowledge administrators. It is a step-by-step guide to enabling Salesforce Knowledge for your organization. Before enabling Salesforce Knowledge it is important that you understand the basic fundamentals of knowledge base design. You must have a clear plan for your Salesforce Knowledge implementation, including:

- How many article types do you need?
- Who should have access to your knowledge base?
- Which data categories do you need?

For more information and further customizations, see the *Salesforce Knowledge Implementation Guide* available in the Salesforce online help.

Creating an Article Type

The first step when setting up Salesforce Knowledge is to create one or more article types. You cannot enable Salesforce Knowledge until at least one article type is created.

To create an article type:

1. From Setup, enter `Knowledge Article Types` in the `Quick Find` box, then select **Knowledge Article Types**.
2. Click **New Article Type** or edit an existing article type.
3. Enter the following:

Field	Description
Label	A name used to refer to the article type in any user interface pages.
Plural Label	The plural name of the object. If you create a tab for this object, this name is used for the tab.
Gender	If it is appropriate for your organization's default language, specify the gender of the label. This field appears if the organization-wide default language expects gender. Your personal language preference setting does not affect whether the field appears. For example, if the organization's default language is English and your personal language is French, you are not prompted for gender when creating an article type.

Field	Description
Starts with a vowel sound	If it is appropriate for your organization's default language, check if your label should be preceded by "an" instead of "a".
Object Name	(Read only) A unique name used to refer to the article type when using the Force.com API. In managed packages, this unique name prevents naming conflicts on package installations. The Object Name field can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Description	An optional description of the article type. A meaningful description will help you remember the differences between your article types when you are viewing them in a list.
Track Field History	Select this option to track the full history of an article and its versions. The system records and displays field updates, publishing workflow events, and language versions for the master article and any translations.
Deployment Status	Indicates whether the article type is visible outside Setup. **In Development** means article managers cannot choose this article type when creating articles. Only select **Deployed** after you are done creating the article type.

4. Click **Save**.

5. On the article type detail page, complete the following information:

   - In the Fields related list, create or modify custom fields as needed.
   - In the Fields related list, edit the article-type layout as needed to rearrange fields and create sections.
   - In the Channel Displays related list, choose a template for the Internal App, Partner, Customer, and Public Knowledge Base.

Setting up Salesforce Knowledge

Complete the following steps to enable Salesforce Knowledge in your organization:

1. From Setup, enter *Knowledge Article Types* in the Quick Find box, then select **Knowledge Article Types** and create one or more article types.

> 📝 **Note:** Before users can access article types, an administrator must set object permissions for article types.

2. From Setup, enter `Knowledge Settings` in the `Quick Find` box, then select **Knowledge Settings**. Confirm that you want to enable Salesforce Knowledge and click `Enable Knowledge`.

3. Select your general settings.

   - Select `Allow users to create and edit articles from the Articles tab` to enable users to edit articles without going to the Article Management tab. Users can click **Edit** an article to open the article edit page. If a published version of the article already exists, they have the option to view the published version or edit the current version. If a draft version exists, they can continue with editing the existing draft, but should carefully review the draft so that they don't overwrite unpublished changes.

   - Select `Activate Validation Status field` to add a Validation Status field to all Salesforce Knowledge articles.

   - Select `Allow users to add external multimedia content to HTML in the standard editor` to allow <iframe> elements in the standard editor to embed multimedia content from the Dailymotion, Vimeo, and YouTube websites.

4. Select at least one option under `Article Summaries`.

   - Internal App
   - Customer
   - Partner

5. Select desired options for how search functions on the Knowledge tab.

   - `Suggest articles for cases considering case content (Beta)` suggests articles based on their content similarity as well as their links between similar cases. If no articles are linked to similar cases, suggested articles have similar titles as the case. Suggested articles are available in the Salesforce Console for Service and your portals when viewing existing cases and creating new ones.

   - `Highlight relevant article text within search results` generates a snippet of the relevant article text with the search terms bolded. See "Search Highlights and Snippets" in the Salesforce Help.

   - `Auto-complete keyword search` suggests the three most popular keyword searches performed on the Knowledge tab. Suggestions are based on the channel (internal, customer, partner, or public) the user is searching.

     > 📝 **Note:** Keyword search history is refreshed once a day.

   - `Auto-complete title search`: suggests up to three articles with matching titles.

   If your organization doesn't have the Knowledge tab enabled see Enabling Knowledge One with Permission Sets and Enabling Knowledge One with Profiles.

6. Choose a **Default Knowledge Base Language**. This is the language your authors will use to write most of the articles. We recommend that your **Default Knowledge Base Language** and your organization's language be the same.

7. If your Knowledge base supports multiple languages, select `Multiple Languages`, add the languages supported, and adjust their settings.

> 📝 **Note:** You can't remove a language once it is added.

8. Optionally, select your `Case Settings`.

   - Allow users to create an article from a case. Choose either the simple or standard editor and define the default article type, assignee, and any Apex customization.
   - Use a profile to create article PDFs. If agents need to attach PDFs to cases make sure `Allow to attach an article as pdf` is checked in the case feed page layout.
   - Allow users to share articles via public URLs
   - Enable list of cases linked to an article

9. Optionally, check `Allow users to create an article from a reply` to create articles from replies in Answers.

10. Click **Save**.

Enabling Salesforce Knowledge for Users

Your organization has available Salesforce Knowledge licenses, if the Knowledge User checkbox appears on a user's detail page. If it does not appear, verify that your organization has purchased enough feature licenses.

1. From Setup, enter `Users` in the `Quick Find` box, then select **Users**.

2. Click **Edit** next to the user's name or click **New** to create a new user.

3. If you are creating a new user, complete all the required fields.

4. Select the `Knowledge User` checkbox.

5. Verify that the user has the required permissions. See Granting Permissions for Salesforce Knowledge Users.

6. Click **Save**.

Granting Permissions for Salesforce Knowledge Users

User permissions control access to different features in Salesforce Knowledge. We recommend using permission sets or custom profiles to grant users the permissions they need. For example, you might want to create a permission set called "Article Manager" that includes the permissions needed to create, edit, publish, and assign articles.

When creating Salesforce Knowledge profiles, keep the following in mind.

- Users who will create article types, manage article actions, and modify settings need the "Manage Salesforce Knowledge" permission. This permission is on by default in the System Administrator profile.
- Users who will search for and view articles from the Articles tab need the "Read" permission for the article types they need to access, see "Creating and Assigning Salesforce Knowledge Users" in the Salesforce Help.
- Users who will edit draft articles, manage the publishing process, or manage the translation process need the "Manage Articles" permission and the appropriate article type permissions. "Manage Articles" is on by default in the System Administrator profile.

- Users with the "Manage Articles" permission are assigned all article actions automatically. "Article actions" in the Salesforce Help allow users to do things like publish and archive articles or manage the translation process.
- Users who will create data categories need the "Manage Data Categories" permission. This permission is on by default in the System Administrator profile.
- Users who will import articles or import or export translations need the "Read," "Create," "Edit," and "Delete" permissions.

Refer to this table for details on permissions associated with Salesforce Knowledge tasks.

Salesforce Knowledge Task	User Permissions Needed
To create article types:	"Manage Salesforce Knowledge"
To manage article actions:	"Manage Salesforce Knowledge"
To create articles from cases using the simple editor:	"Read" and "Create" on the article type
To create articles from cases using the standard editor:	"Manage Articles" AND "Read" and "Create" on the article type
To search articles from cases and attach articles to cases:	"Read" on the article type
To create articles from answers:	"Read" and "Create" on the article type
To search for and read articles from the Article or Knowledge tab:	"Read" on the article type
To create or edit articles from the Article Management tab:	"Manage Articles" AND "Read", "Create", and "Edit" on the article type
To edit draft articles from the Article Management tab:	"Manage Articles" AND "Read" and "Edit" on the article type
To delete articles from the Article Management tab:	"Manage Articles" AND "Read", "Edit", and "Delete" on the article type AND A delete article action, set on the Article Actions Setup page.
To publish articles from the Article Management tab:	"Manage Articles" AND

Salesforce Knowledge Task	User Permissions Needed
	"Read", "Create", "Edit", and "Delete" on the article type AND A publish article action, set on Article Actions Setup page
To assign articles for the Article Management tab:	"Manage Articles" AND "Read" and "Edit" on the article type
To edit published or archived articles:	"Manage Articles" AND "Read", "Create", and "Edit" on the article type AND A publish or archive article action, set on the Article Actions Setup page
To archive articles from the Article Management tab:	"Manage Articles" AND "Read", "Create", "Edit", and "Delete" on the article type AND An archive article action, set on the Article Actions Setup page
To submit articles for translation:	"Manage Articles" AND "Read", "Create", and "Edit" on the article type AND A translate article action, set on the Article Actions Setup page
To delete translated articles:	"Manage Articles" AND "Read", "Edit", and "Delete" on the article type AND A delete article action, set on the Article Actions Setup page
To publish translated articles:	"Manage Articles" AND

Salesforce Knowledge Task	User Permissions Needed
	"Read", "Create", "Edit", and "Delete" on the article type AND A publish article action, set on the Article Actions Setup page
To edit translated articles:	"Manage Articles" AND "Read", "Create", and "Edit" on the article type AND A translate article action, set on the Article Actions Setup page
To import articles:	"Manage Salesforce Knowledge" AND "Manage Articles" AND "Manage Knowledge Article Import/Export" AND "Read", "Create", "Edit", and "Delete" on the article type
To import and export translated articles:	"Manage Salesforce Knowledge" AND "Manage Articles" AND "Manage Knowledge Article Import/Export" AND "Read", "Create", "Edit", and "Delete" on the article type

📝 Note:

- To delete published article and translations, first remove them from publication by choosing edit or archive.
- When a user without delete access cancels the editing on published article, the newly created article draft is not deleted automatically.

Configuring Salesforce Knowledge in Your Organization

To add the Article and Article Management tabs to Apps:

1. From Setup, enter `Apps` in the `Quick Find` box, then select **Apps**.

2. Click **Edit** next to an existing App or click **New** to create your own. If you are creating a new App the following steps are included in the New Custom App wizard.

3. From the `Available Tabs` list, select **Articles** and **Article Management**.

4. Click **Add**.

5. Optionally check `Overwrite users' personal custom app customizations`. This is not available if you are creating a new App.

6. Assign profiles that can view the App.

7. Click **Save**.

To add knowledge-related data to case page layouts:

1. From Setup, enter `Cases` in the `Quick Find` box, then select **Page Layouts**.

2. Click **Edit** next to `Case Layout`, another existing page layout, or click **New** to create your own. If you are creating a new layout the following steps are included in the Create New Page Layout wizard.

3. Click **Related Lists** in the top-left-hand corner.

4. Drag the Articles related list and drop it into the related list section.

5. Click **Save**.

Configuring Data Categories

Data categories help users classify and find articles. Administrators can add data categories to data category groups.

To create or edit a category group:

1. From Setup, enter `Data Category` in the `Quick Find` box, then select **Data Category Setup**.

2. To create a new category group, click **New** in the Category Groups section. By default, you can create a maximum of five category groups and three active category groups. Contact Salesforce to request additional category groups.

   To edit an existing category group, hover your cursor over the category group name and then click

   the **Edit Category Group** icon ( ).

3. Specify the `Group Name`. This name appears as the title of the category drop-down menu on the Article Management and Articles tabs, and, if applicable, in the public knowledge base. The `Group Name` does not appear on the Answers tab.

4. Optionally, modify the `Group Unique Name`. This is a unique name used to identify the category group in the SOAP API.

5. Optionally, enter a description of the category group.

6. Click **Save**. You receive an email after the save process completes.

To add categories to a category group:

1. From Setup, enter *Data Category* in the `Quick Find` box, then select **Data Category Setup**.

2. Click the category group name.

3. Click a category that is directly above where you want to add a category (a parent), or at the same level (a sibling).

4. Click **Actions**, then select an action: **Add Child Category** or **Add Sibling Category**.

5. Enter a category name.

   If possible, Salesforce automatically reuses the name you entered as the `Category Unique Name`, a system field which the SOAP API requires.

6. Click **Add**. Alternatively, press Enter.

7. Click **Save**. Save your changes frequently. The more actions you perform before clicking **Save**, the longer it takes to save.

   Tip: By default, all Salesforce Knowledge users and zone members can see all categories within an active category group. You can restrict category visibility after you have set up your data categories to ensure that users only access articles and questions that you want them to see.