

Lightning Knowledge Guide

Salesforce, Spring '19



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SALESFORCE KNOWLEDGE

Give your website visitors, clients, partners, and service agents the ultimate support tool. Salesforce Knowledge lets you create and manage a knowledge base with your company information and securely share it when and where it's needed.

Your Salesforce Knowledge base is built from knowledge articles, which are documents of information. Articles can include information on process, like how to reset your product to its defaults, or frequently asked questions, like how much storage your product supports.

Experienced service agents and internal writers write the articles. The articles are then published to a range of channels: Internal App, customer and partner communities, or public websites. Where and what information is published is based on the article layout profile and the field level security.

As of Spring '17, Knowledge is available in both Salesforce Classic and Lightning Experience. Lightning Knowledge, which is Generally Available, is recommended for orgs new to Knowledge, or for existing orgs that can easily consolidate to one article type.

 **Note:** Enabling Lightning Knowledge changes your org's data model to use record types rather than article types. Orgs with multiple article types require data migration to consolidate article types before enabling Lightning Knowledge.

Important: After you enable Lightning Knowledge, you can't disable it. Test in a sandbox or trial org before enabling in production.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

[Salesforce Knowledge Help and Resources](#)

Find the information you need about Salesforce Knowledge.

[Compare Lightning Knowledge with Knowledge in Salesforce Classic](#)

As of Spring '17, Knowledge is available in both Salesforce Classic and Lightning Experience. Compare Lightning Knowledge with Classic Knowledge and decide if you're ready to enable Lightning Knowledge in your org.

[Lightning Knowledge Limitations](#)

Keep these limitations in mind when making the switch to Lightning Knowledge.

[Set Up Lightning Knowledge with a Guided Setup Flow](#)

Get up and running effortlessly with Lightning Knowledge using a quick guided setup flow. Create your Knowledge base, select your article authors, and make data category groups.

[Set Up and Configure Lightning Knowledge](#)

Enable Lightning Knowledge, create Knowledge record types, customize your record type page layouts, set access for Knowledge users, and create a Lightning Knowledge process.

[Use Your Lightning Knowledge Base](#)

Search articles, author and manage articles, use the Knowledge component in the Lightning Service Console, and create Knowledge reports.

[Import External Content into Salesforce Knowledge](#)

You can import your existing external articles or information database into Salesforce Knowledge. If you want to move your content from Classic to Lightning Knowledge, use the Lightning Knowledge Migration Tool.

[Support Articles in Multiple Languages](#)

With multiple languages for Salesforce Knowledge, you can lower support costs by translating articles into the languages your audience prefers. After selecting your language settings, two translation methods are available: translating articles in-house using the editing tool in the knowledge base, or sending articles to a localization vendor. Different languages can use different methods. For example, you may want to export articles to a vendor for French translations, but assign articles to an internal Knowledge user for Spanish translations.

[Define Data Categories for Your Lightning Knowledge Articles](#)

Create data categories and data category groups to help Knowledge users and customers find what they need. Some data category information doesn't apply to Lightning Knowledge.

SEE ALSO:

[Salesforce Knowledge Help and Resources](#)

Salesforce Knowledge Help and Resources

Find the information you need about Salesforce Knowledge.

Overview of Salesforce Knowledge

- [Salesforce Knowledge](#)
- [Plan Your Knowledge Base](#)
- [Lightning Knowledge Guide](#)
- [Salesforce Knowledge Guide \(Classic\)](#)

Lightning Knowledge

Set up Lightning Knowledge

- [Enable Lightning Knowledge](#)
- [Set Up and Configure Lightning Knowledge](#)
- [Record Type Considerations for Lightning Knowledge](#)
- [Lightning Knowledge Home and Record Pages](#) on page 11
- [Lightning Knowledge User Access](#)

Use Salesforce Knowledge in Lightning Experience

- [Authoring Actions in Lightning Knowledge](#) on page 17
- [Search Articles in the Global Search Box and the Knowledge Component](#) on page 16
- [Use the Knowledge Component in the Lightning Service Console](#) on page 19

Migrate from Salesforce Classic to Lightning Knowledge

- [Lightning Knowledge Migration Tool](#) Lightning Knowledge Migration Tool
- [Lightning Knowledge Migration Tool Features and Considerations](#)

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Classic Knowledge

Set up Classic Knowledge

- [Build Your Knowledge Base in Salesforce Classic](#)
- [Knowledge Article Types](#)
- [Import External Content into Salesforce Knowledge](#)
- [Classic Knowledge User Access](#)
- [Workflow and Approvals for Articles](#)

Use Your Salesforce Knowledge Base in Salesforce Classic

- [Search Articles and External Sources on the Knowledge Tab](#)
 - [Find Knowledge Articles in a Salesforce Console in Salesforce Classic](#)
 - [How Does Search Work?](#)
 - [Articles or Knowledge Tab](#)
 - For searching and viewing Salesforce Knowledge Articles on your Android device, see [Access Salesforce Knowledge Articles with Salesforce for Android \(Beta\)](#) and [Salesforce App Differences from the Full Salesforce Site](#)
- [Create and Edit Articles](#)
- [Publish Articles and Translations](#)
- [Report on Salesforce Knowledge Articles](#)

Trailhead

- [Knowledge Basics \(Lightning\)](#)
- [Knowledge Basics \(Classic\)](#)
- [Knowledge Search Basics \(Classic\)](#)

Define Data Categories for Your Salesforce Knowledge Articles

- [Work with Data Categories](#)
- [Create and Modify Category Groups](#)
- [Add Data Categories to Category Groups](#)

Translate Salesforce Knowledge Articles

- [Work with Articles and Translations](#)
- [Support a Multilingual Knowledge Base](#)
- [Translate Articles in Classic Knowledge](#)
- [Export Articles for Translation](#)
- [Import Translated Articles](#)
- [Set Up Master Article and Translation Side-By-Side View](#) [Set Up Master Article and Translation Side-By-Side View](#)

Share Your Salesforce Knowledge Base

- [Find, Attach, and Email Articles with the Case Feed Articles Tool](#) (Classic)
- [Enable Salesforce Knowledge in Your Community](#) (Classic)
- [Use Knowledge with Live Agent](#) (Classic)
- If you want to let visitors search and view Salesforce Knowledge articles on your public site, set up a [Customer Service \(Napili\) Template](#). Napili is a powerful, responsive self-service template that also lets visitors post questions to the community, collaborate, and contact support agents by creating cases.

Knowledge and the Salesforce App

- [What's Available in Each Version of the Salesforce App](#)
- [Customer Service Features: What's Not Available in the Salesforce App](#)

Develop with Salesforce Knowledge

- The [Salesforce Knowledge Developers Guide](#) has specific development information for Salesforce Knowledge along with tutorials and examples.
- The [REST API Developer Guide](#) has information on supporting articles with the REST API.
- The [SOAP API Developer Guide](#) has information on the Salesforce Knowledge API:
 - Guidelines
 - Objects
 - Calls
- The [Metadata API Developers Guide](#) has information on Salesforce Knowledge Metadata API objects.
- The [Visualforce Developers Guide](#) has information on Salesforce Knowledge Visualforce components.
- The [Lightning Platform Apex Code Developers Guide](#) has information on the Apex KnowledgeArticleVersionStandardController Class.

Compare Lightning Knowledge with Knowledge in Salesforce Classic

As of Spring '17, Knowledge is available in both Salesforce Classic and Lightning Experience. Compare Lightning Knowledge with Classic Knowledge and decide if you're ready to enable Lightning Knowledge in your org.

Lightning Knowledge has changed the way Knowledge works in Salesforce. For example, standard record types replace article types, and the Knowledge component for Lightning Service Console replaces Knowledge One for the Service Console in Salesforce Classic.

Lightning Knowledge works differently than Classic Knowledge, but currently has limitations. Let's compare Knowledge in Salesforce Classic and Lightning Experience.

Feature	Classic Knowledge	Lightning Knowledge
Setup	Salesforce Classic Setup	Lightning Knowledge Setup
Types of articles	Article Types	Standard Record Types
Use Knowledge in the console	Add Knowledge One to the Service Console	Add the Lightning Knowledge component via the Lightning App Builder
Page layouts	Fields only, per article type and user profile	Fields, actions, and related lists, per record type and user profile
Record home (articles)	Custom record home	Default Record Home and Record Home that is configurable via the Lightning App Builder
Object home	Knowledge One and Article Management tab	Knowledge home page with list views
Access and permissions	CRUD, profile permissions, page layouts, and custom article actions per public group	CRUD, profile permissions, and page layouts
Files	Files are attached in custom file fields	Files are stored in the standard Files Object and attached in the files related list

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Lightning Knowledge Limitations

Keep these limitations in mind when making the switch to Lightning Knowledge.

 **Note:** Knowledge in Lightning Experience works differently than Knowledge in Salesforce Classic. Enabling Lightning Knowledge changes your org's data model to use record types rather than article types. After you enable Lightning Knowledge, you can't disable it.

To move from Classic Knowledge to Lightning Knowledge, use the Lightning Knowledge Migration Tool. Before running the migration tool in your production org, test the migration in a recently refreshed full-copy sandbox. Verify all customizations and integrations to Knowledge. A carefully prepared migration plan minimizes the impact on production during migration.

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Important Considerations for Enabling Lightning Knowledge

- To move your knowledge base from Classic Knowledge into Lightning Knowledge, use the [Lightning Knowledge Migration Tool](#). Keep in mind that the migration process requires manual steps and verification. It's possible that some of your data might not migrate over. To enable the migration tool in your sandbox or production org, contact Salesforce support.
- Permissions and user access work differently in Lightning Knowledge. See [Lightning Knowledge User Access](#). When Lightning Knowledge is enabled, user profile permissions replace [article actions with public groups](#).
- In a Lightning Knowledge enabled org, the *Modify All* permission is required to delete archived articles.
- For list views, you must specify one language and one publication status. If a language or publishing status isn't specified, Lightning Knowledge defaults to Published for Publication Status and the user's default language. Multiple selections aren't supported on the Publication Status and Language fields.
- Lightning Knowledge doesn't support the IN and OR operators in list view filters.
- After you enable Lightning Knowledge, the Article Type field is no longer accessible via SOQL (or the API). This can impact custom code that queries for the `ArticleType` field.
- If your org currently has a Visualforce tab named "Knowledge," you get an "Insufficient Privileges" error when trying to access the Knowledge tab in Lightning Knowledge. To avoid this error, rename or delete your existing Visualforce tab, or rename your Knowledge object from "Knowledge" to something else.
- Files in custom File fields in Salesforce Classic are not supported in Lightning Experience. Instead, use the Files related list in Lightning Experience. Use the Lightning Knowledge Migration Tool to move Files from File fields to the Files object and related lists in Lightning Experience.
- URL formats for articles differ between Classic and Lightning Knowledge. In Lightning Knowledge, the URL contains the Knowledge Article Version ID (along with other parameters). In Classic Knowledge, the URL contains the Knowledge Article ID.
- You can't use Public Knowledge Packages (PKB) in Lightning Knowledge.

General Usage Limitations for Lightning Knowledge

- Deleting archived articles is not available in Lightning Knowledge. However, you can still perform this action in Salesforce Classic when Lightning Knowledge is enabled.
- For articles with more than 30 versions, the versions above 30 show in Salesforce Classic, but not in Lightning Experience.

- You currently can't remove a published article while editing it. Instead, the article remains published while you edit the new version as a draft. You can still perform this action in Classic when Lightning Knowledge is enabled.
- Some bulk actions are not available in Lightning Knowledge. Only the publish, archive, and assign bulk actions are currently supported in Lightning Experience.
- The option to create an article when closing a case is available only in Salesforce Classic. In Lightning Experience, you can create an article from the Knowledge component.
- Data categories can't be shown in Knowledge list views in Lightning Experience or Salesforce Classic. Data categories are only used for filtering in searches and reports.
- You can't add promoted search terms to articles in Lightning Knowledge.
- You can't see vote information in the new ratings component unless there's a published (also known as online) version of the article. This affects article drafts and archived articles, because all online versions are removed when an article is archived.
- When articles are exported for translation, the files attached to them are not exported. Files are also not imported as attached Files when Articles translations are reimported after translation is complete.
- Before December 2017, when knowledge articles were authored with images in Lightning Experience, only the author could view the images. Other users with Read permission enabled for Knowledge articles were not able to see the images. As of December 2017, the issue was remedied. Photos uploaded from December 2017 forward are now visible to all users with Read permission enabled. Photos uploaded before December 2017 must be reuploaded.
- Star ratings are not supported in Lightning Knowledge. Currently, only thumbs up and thumbs down ratings are supported in Lightning Experience. Star ratings in existing Salesforce Classic orgs are automatically converted to thumbs up ratings in Lightning Experience. Ratings of 3, 4, and 5 stars become a thumbs up, and 1 or 2 star ratings become thumbs down.
- You can't use inline edit on the Knowledge record home.

Console Limitations for Lightning Knowledge

- The Knowledge footer is not in the Lightning Service Console.
- The following actions aren't available in the Knowledge component for the Lightning Service Console: attach as a PDF to case email and insert article Community URL to case publishers.

Limitations in Salesforce Classic After Enabling Lightning Knowledge

The following items aren't available in Salesforce Classic after enabling Lightning Knowledge.

- Knowledge list views
- Search for article types
- Setting a default record type for new articles. (The default setting works in Lightning Knowledge. In Salesforce Classic, users can change the record type manually.)
- Filtering a search by Knowledge Record Types
- Filtering a search by Archived Articles (except in Article Management)
- Files in the Files related list in Lightning Experience don't display in Salesforce Classic
- The following items aren't available on the Knowledge article record home in Salesforce Classic:
 - Page layout selections for actions and related lists
 - Two-column page layouts
 - Some actions, such as Change Record Type

Limitations for Using Lightning Knowledge with Other Salesforce Products

- File sharing works differently in Lightning Knowledge. To remove an attached file from an article, click the file title, and choose **Share**. Expand the Who can Share section, and click the X next to the article.
- If you're using Salesforce for Android or iOS, recent articles aren't displayed on object home.
- You can't remove the Title and URL Name fields from a page layout because they're required. Communities use page layouts to display Lightning Knowledge articles, so you can't remove these fields from Communities.

Set Up Lightning Knowledge with a Guided Setup Flow

Get up and running effortlessly with Lightning Knowledge using a quick guided setup flow. Create your Knowledge base, select your article authors, and make data category groups.

The Lightning Knowledge setup flow is the fastest and easiest way to get your knowledge base up and running. Whether it's a secure customer portal, part of your public site, or integrated into a public customer community, your knowledge base can be an extension of your service website.

You can also embed Lightning Knowledge in the console so your support agents can easily find, access, and deliver the right answers to customers. Agents can also contribute to the knowledge base, ensuring that the best answers are always accessible to the whole team.


EDITIONS

Service Setup is available in Lightning Experience

Available in: All editions with the Service Cloud

 **Important:** After you enable Lightning Knowledge, you can't disable it.

Where to Access the Setup Flow

This flow is available from Service Setup in Lightning Experience. You can get to Service Setup by clicking  and selecting Service Setup.


In Service Setup, you can find recommended setup flows, content, and tips based on what you've set up already. If you don't see the setup flow you're looking for, you can click View All to see the full list.

Select the tile to launch the flow.

What Does This Flow Do?

In this setup flow, we walk you through:

- Enabling Lightning Knowledge
- Choosing knowledge article authors
- Creating data categories and data category groups

 **Tip:** Data Category Groups help you classify and find articles. You can use data categories to control access to a set of articles, questions or ideas.

We also turn on several things in the background during the setup flow.

Enabling Lightning Knowledge

We enable Lightning Knowledge during the flow, which can't be undone. Don't worry about this if you've never used Knowledge before and you're ready to dive in on Lightning Experience.

Lightning Knowledge is different than Salesforce Knowledge in Salesforce Classic, so if you already use Salesforce Classic, make sure you know and understand what changes and what works differently when you switch.

Default Page Layouts and Record Types

There is a default FAQ page layout and record type that is auto-enabled in the setup flow. This is how the articles are displayed in your layout. By doing this step, you are associating the page layout and record types. However, if you prefer, you can still go into the Object Manager to create or modify your page layouts.



Note: If you created a page layout and record type before starting the Lightning Knowledge setup flow, we don't create new ones in the setup flow. The integrity of your initial settings isn't altered in any way.

Knowledge Permission Sets

Your selected authors get full read, write, and publishing access through the Knowledge LSF permission set, and access to the Knowledge Object.

The setup flow auto-enables the page layout and record type for these profiles. Everyone whom you designate an author gets a Knowledge User License.

The setup flow grants data category visibility to profiles selected on the Choose Author screen.

Set Up and Configure Lightning Knowledge

Enable Lightning Knowledge, create Knowledge record types, customize your record type page layouts, set access for Knowledge users, and create a Lightning Knowledge process.

Enable Lightning Knowledge

Enable Lightning Knowledge to use your Knowledge base in Lightning Experience. After you enable Lightning Knowledge, you can't disable it.

Record Type Considerations for Lightning Knowledge

Different content has different needs. For example, your FAQ pages are different from your tutorials, which are different from your policy statements. A record type controls an article's content and layout. Create different record types to distinguish Knowledge articles. In Lightning Knowledge, standard record types replace custom article types.

Page Layout Considerations for Lightning Knowledge

A page layout determines which fields agents can view and edit when entering data for an article. It also determines which sections appear when users view articles. You can customize the fields, actions, and related lists for each record type and user profile with page layouts.

Lightning Knowledge Home and Record Pages

Search, view, create, and manage articles on the Knowledge home page in Lightning Experience.

You can perform several authoring actions without leaving Knowledge home. For instance, you can restore, archive, delete, publish, and submit articles for translation or approval.

Lightning Knowledge User Access

Give your knowledge agents access to articles in Lightning Knowledge. Specify which agents in your company are Salesforce Knowledge users and can create, edit, archive, and delete articles. Create user profiles with the appropriate user permissions, and then assign users to these profiles.

Define Validation Status Picklist Values

When the `Validation Status` field is enabled on the Knowledge Settings page, you can create picklist values that show the state of the article. For example, values could be `Validated`, `Not Validated`, or `Needs Review`.

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.


Enable Lightning Knowledge

Enable Lightning Knowledge to use your Knowledge base in Lightning Experience. After you enable Lightning Knowledge, you can't disable it.

1. From Salesforce Classic Setup, enter *Knowledge* in the *Quick Find* box and click **Knowledge Settings**.
2. If you're new to Knowledge, enable Knowledge in Salesforce Classic by selecting **Yes** and clicking **Enable Salesforce Knowledge**.
3. On the Knowledge Settings page, click **Edit**.
4. Select **Enable Lightning Knowledge**.
5. Click **Save**.

After Lightning Knowledge is enabled, the node **Knowledge Object Setup** appears. This is where you control your Lightning Knowledge settings and page layouts.

Whenever you change the name and API name of your Knowledge Base in **Knowledge Object Setup**, we recommend that you do a hard refresh of your browser to avoid server errors.

 **Note:** Enabling Lightning Knowledge changes your Org's Data Model to use Record Types rather than Article Types. Orgs with multiple article types require data migration to consolidate article types before enabling Lightning Knowledge. **IMPORTANT:** After you enable Lightning Knowledge, you can't disable it. Test in a Sandbox or Trial org before enabling in production.

Record Type Considerations for Lightning Knowledge

Different content has different needs. For example, your FAQ pages are different from your tutorials, which are different from your policy statements. A record type controls an article's content and layout. Create different record types to distinguish Knowledge articles. In Lightning Knowledge, standard record types replace custom article types.

When you build your knowledge base, plan how to get the most from your record types by customizing profiles, page layouts, and other features.

- [Create Record Types](#)
- [Customize Page Layouts](#)
- [Page Layout Considerations for Lightning Knowledge](#)
- [Lightning Knowledge User Access](#)

SEE ALSO:

[Tailor Business Processes to Different Users](#)
[Create Custom Fields](#)

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Page Layout Considerations for Lightning Knowledge

A page layout determines which fields agents can view and edit when entering data for an article. It also determines which sections appear when users view articles. You can customize the fields, actions, and related lists for each record type and user profile with page layouts.

You can use a page layout to customize fields, actions, and related lists for each record type and user profile. For example, when sensitive data is involved, you can customize a page layout by user profile. Then only agents assigned the user profile can see sensitive fields in the article.

Consider these tips when you configure page layouts for Knowledge.


- Authoring actions that you add to the Salesforce Mobile and Lightning Experience Actions section of the page layout appear in the highlights panel on record pages in Lightning Experience and the Salesforce app.
- The Title and URL Name standard fields are required. You can't remove them from the layout.
- To control which audiences can view an article, add these fields to the page layout: Visible in Internal App; Visible to Customer; Visible to Partner; and Visible in Public Knowledge base. The fields appear as checkboxes in the record.

SEE ALSO:

[Page Layout Tips](#)

Lightning Knowledge Home and Record Pages


Search, view, create, and manage articles on the Knowledge home page in Lightning Experience. You can perform several authoring actions without leaving Knowledge home. For instance, you can restore, archive, delete, publish, and submit articles for translation or approval.

 **Note:** Create the Lightning Knowledge home page to access Knowledge in Lightning Experience. For orgs created in Spring '17 or later, the Lightning Knowledge home page is created for you.

Knowledge Home

Lightning Knowledge home uses the same list views that you enjoy elsewhere in Salesforce. By default, you have list views for drafts, published articles, and archived articles. Don't forget to customize your list views to select which fields you want to display and sort with. For custom list views, you can't choose fields that aren't on the article record. So data categories, ratings, view count, and cases aren't available fields for your list views.

By default, list views use the user's language, or the master language for Knowledge if the user's language isn't available. You can't create list views that show articles in multiple languages.

 **Important:** You can't use the IN and OR operators in list view filters, and you can't select more than one publication status.

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USER PERMISSIONS

To customize page layouts:

- Customize Application

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Article Record Pages

Use the Lightning App Builder to configure the default record page to match your users' workflow. Your Lightning page consists of article page layouts and the components you choose for your users.

In addition to standard components, you can use components built by partners and developers from AppExchange. You can even build your own components. With Lightning record pages, you can move the ratings, versions, data category, and translation components to the areas of the page that work best for your users.

You can add these components to your record pages.

Ratings (Article Thumb Vote)

Collect feedback with thumbs-up and thumbs-down ratings. Automatically enabled.

Files

Add the Files related list in your record type page layout.

Versions

Select Track Field History and Set History Tracking in the Object Manager. These options make the article version history and field changes available for Knowledge users to view in the versions component.

Article Data Categories

Users with permission to manage data categories can change an article's categories.

Translation Switcher

Give translators and administrators an easy way to switch between draft and published versions of an article in all languages.

Translation Master Article

Show the master article and translation in the same page layout to assist translators. You can set visibility conditions so only translators and knowledge base managers see the [side-by-side view](#).

SEE ALSO:

[Authoring Actions in Lightning Knowledge](#)

Lightning Knowledge User Access

Give your knowledge agents access to articles in Lightning Knowledge. Specify which agents in your company are Salesforce Knowledge users and can create, edit, archive, and delete articles. Create user profiles with the appropriate user permissions, and then assign users to these profiles.

User permissions control access to different tasks in Salesforce Knowledge. By default, all internal users with Read permission can read articles. You need to assign permissions to agents and authors who are publishing, archiving, deleting, and managing articles.

Use permission sets or custom profiles to give agents, authors, and other users the Knowledge access they need. For example, you can create a permission set named Article Manager that includes the permissions to create, edit, publish, and assign articles. You can then create a Knowledge Base Manager profile with permission to archive and delete articles.



Tip: Lightning Knowledge uses user profile permissions or permissions sets to give agents access to authoring actions. In contrast, Knowledge in Salesforce Classic uses public groups and article actions.

Some licenses, like the Knowledge Only User license, require the AllowViewKnowledge permission on the user's profile. To give a user this permission, activate the permission on a cloned profile and assign the cloned profile to the user.



Note: To do more than read articles, agents need the Knowledge User license.

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 user.
3. If you are creating a user, complete all the required fields.
4. Select **Knowledge User**.
5. Click **Save**.

This table lists the required profile and object permissions for authoring tasks. For permissions in Salesforce Classic, see [Classic Knowledge User Access](#).

Table 1: Lightning Knowledge Permissions

Lightning Knowledge Task	User Permissions	Knowledge Object Permissions
Read and search knowledge articles	Allow View Knowledge	Read
Attach articles to cases and search articles	Allow View Knowledge	Read on Knowledge; Read and Edit on Case
Create articles	Manage Articles	Create, Read, Edit
Edit draft articles	Manage Articles	Read, Edit
Delete draft articles	Manage Articles	Read, Edit, Delete
Change the record type	Manage Articles	Read, Edit
Publish articles	Manage Articles; Publish Articles	Create, Read, Edit, Delete

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USER PERMISSIONS

To create or edit users:

- Manage Internal Users


To assign Knowledge permissions:

- Customize Application
- AND
- Manage Salesforce Knowledge

Lightning Knowledge Task	User Permissions	Knowledge Object Permissions
Archive articles	Manage Articles; Archive Articles	Modify All
Restore archived articles	Manage Articles; Archive Articles	Modify All
Assign articles	Manage Articles	Read, Edit
Edit published articles	Manage Articles	Create, Read, Edit
Submit articles for translation	Manage Articles; Article Translation–Submit for Translation	Create, Read, Edit
Delete draft translations	Manage Articles	Read, Edit, Delete
Edit translations	Manage Articles; Article Translation–Edit	Read, Edit
Publish translations	Manage Articles; Article Translation–Publish	Create, Read, Edit, Delete
Import articles	Manage Salesforce Knowledge; Manage Articles; Manage Knowledge Article Import/Export	Create, Read, Edit, Delete
Import and export articles for translation	Manage Salesforce Knowledge; Manage Articles; Manage Article Import/Export	Create, Read, Edit, Delete
Create data categories	Manage Data Categories; View Data Categories in Setup	None

Define Validation Status Picklist Values

When the `Validation Status` field is enabled on the Knowledge Settings page, you can create picklist values that show the state of the article. For example, values could be `Validated`, `Not Validated`, or `Needs Review`.

 **Note:** In Salesforce Classic, validation status picklist values aren't retained when you export articles for translation. Articles with picklist values can be imported, however, and their values are retained as long as the values exist in your organization.

1. From Salesforce Classic Setup, enter `Validation Statuses` in the `Quick Find` box, then select **Validation Statuses**.
2. On the picklist edit page, click **New** to add new values to the validation status field. You can also edit, delete, reorder, and replace picklist values.
When you replace a picklist value, the system replaces it in all versions of the article, including any archived versions.
3. Add one or more picklist values (one per line) in the text area.
4. To set the value as the default for the picklist, be sure to select the `Default` checkbox.
5. Click **Save**.

SEE ALSO:

[Validation Rules](#)

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To create or change validation status picklist values:

- [Customize Application](#)

Use Your Lightning Knowledge Base

Search articles, author and manage articles, use the Knowledge component in the Lightning Service Console, and create Knowledge reports.

[Search Articles in the Global Search Box and the Knowledge Component](#)

Perform a Knowledge search in the global search box at the top of every page, and in the Knowledge component for the Lightning Service Console.

[Authoring Actions in Lightning Knowledge](#)

Use authoring actions like edit, publish, and restore to manage articles from the Knowledge home and article record pages. Administrators, agents, and internal employees with the correct profile permissions can perform the actions.

[Use the Knowledge Component in the Lightning Service Console](#)

The Knowledge component keeps agents connected to your Knowledge base while they're working in the console. Agents can see suggested articles for the case they're viewing, or perform a search to find more articles. They can use the component to attach an article to (or remove an article from) a case, follow and unfollow articles, and search within Knowledge.

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

[Let Agents Insert Article Content into Emails in Lightning Knowledge](#)

In the Lightning Knowledge component, agents can directly embed article content into the body of customer emails. You can choose which article fields go into emails for each record type. Instead of sending a URL, your customers can then access the information without going to a website. Agents can send articles that are not published publicly without rewriting or copying an internal article. By using permissions, admins can let specific agents choose which internal articles to share externally while others can send only published, external articles.

[Create Persistent Links to Lightning Knowledge Articles](#)

You can manually create a permanent link to a Lightning Knowledge article. The link, called a permanent or static link, points to the latest version of an article in the user's preferred language. You can embed an article link in external sites and documents to provide your users with access to the latest version.


[Report on Salesforce Knowledge Articles](#)

Use Salesforce Knowledge custom reports to track how articles are created, maintained, and delivered.


Search Articles in the Global Search Box and the Knowledge Component

Perform a Knowledge search in the global search box at the top of every page, and in the Knowledge component for the Lightning Service Console.


In Lightning Experience, Knowledge search is available in both the global search box and the Knowledge component. The advanced search option lets you pre-filter your results by language, publishing status, validation status, record type, or data category group.

 **Note:** If you configure search filters for Knowledge in Setup, the advanced search filters for Knowledge in global search don't change.

1. Select **Knowledge** in the dropdown list next to the global search box. You can also type *knowledge* at the top of the dropdown list, then select **Knowledge**.
2. Optionally, click **Advanced Search** to pre-filter your results by language, publishing status, validation status, record type, or data category group. Filters you've selected appear in the search box.
3. Enter your search terms.

 **Note:** You can enter up to 100 characters. If you enter more than 100 characters, only the first 100 characters are used when you run the search.

4. Press *Enter* to run the search.

 **Note:** You can also search Knowledge using the Knowledge component for the Lightning Service Console. Use **Advanced Search** to add pre-filters, enter your search terms, and run the search.

SEE ALSO:

[How Does Search Work?](#)

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Authoring Actions in Lightning Knowledge

Use authoring actions like edit, publish, and restore to manage articles from the Knowledge home and article record pages. Administrators, agents, and internal employees with the correct profile permissions can perform the actions.

Authoring actions appear in Knowledge home and in record pages. Administrators, agents, and internal employees with the correct profile permissions can perform these actions.

Actions in Knowledge Home

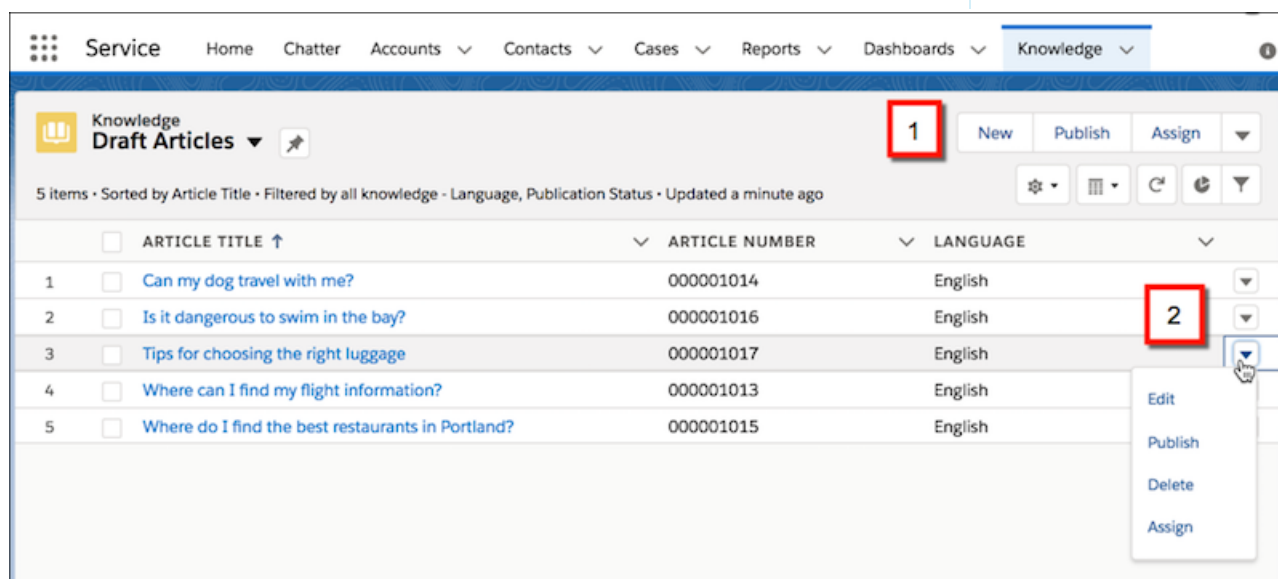
In Knowledge list views, including Knowledge home, you can quickly perform record actions that affect one or multiple records. In Knowledge home, actions appear if the user has the permission to use them. Use bulk actions (1) to quickly update multiple records at once. Use the dropdown next to each article (2) to choose record-level actions.

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.



Actions in Record Pages

For article record pages, you can control which authoring actions are available with page layouts and user permissions. The actions that appear also depend on the article's publishing status.

You add authoring actions in the page layout editor.



When Are Lightning Authoring Actions Available?

In Lightning Knowledge page layouts, actions are shown or hidden based on the article's publication status. In Knowledge home, bulk actions appear on all list views for users with the appropriate permission.

SEE ALSO:

[Lightning Knowledge User Access](#)

When Are Lightning Authoring Actions Available?

In Lightning Knowledge page layouts, actions are shown or hidden based on the article's publication status. In Knowledge home, bulk actions appear on all list views for users with the appropriate permission.

The availability of a particular knowledge action is based on the article's publication status.

Action	Description	Record Status
New	Create an article.	Knowledge home only
Edit	Edit a draft article.	Draft
Edit as Draft	Create a draft from a published article. You don't see this button if a draft already exists.	Published
Assign	Change the record owner by assigning an article.	Draft
Publish	Publish a draft article. Also publishes associated translations submitted to the publication queue.	Draft
Delete	Delete drafts of master-language or translated articles.	Draft
Change Record Type	Assign a new record type. This action can affect the page layout and available fields.	Draft
Archive	Archive a published article.	Published

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Action	Description	Record Status
Restore	Restore a draft from an archived article.	Archived
Submit for Approval	Send the article for approval and assign an approver. Approvals must be enabled.	Draft
Submit for Translation	Submit the article to the translation queue or assign to a user. Multiple languages must be enabled.	Draft, Published

These bulk actions are available in Knowledge home:

- Assign
- Archive
- Publish

Use the Knowledge Component in the Lightning Service Console

The Knowledge component keeps agents connected to your Knowledge base while they're working in the console. Agents can see suggested articles for the case they're viewing, or perform a search to find more articles. They can use the component to attach an article to (or remove an article from) a case, follow and unfollow articles, and search within Knowledge.

The Knowledge component helps agents quickly find relevant Knowledge articles for their cases and perform some basic actions, such as attaching an article to a case.

Suggested Articles

Suggested articles are delivered right to the Knowledge component, so agents can find relevant articles without running a search. Suggested articles are automatically enabled when Lightning Knowledge is enabled.

Search and Sort Your Results

Use the search box in the component to perform a Knowledge search. If you'd like, use Advanced Search for pre-filtering to narrow the search results you see.

To sort your search results, click the sort icon and select a sort option from the list. You can sort your search results by relevance, publish date (for published articles), last modified date (for article drafts), A to Z, and Z to A. Sorting doesn't apply to suggested articles.

By default, articles are sorted by relevance. If you go back to suggested articles or go to a new case, the sort order is reset to relevance.

Attach and Remove Articles in the Knowledge Component

Agents can attach Knowledge articles to cases and remove articles from cases using the dropdown next to any article.

Follow and Unfollow with the Knowledge Component

Agents can follow and unfollow an article from the component using the dropdown next to the article. Following articles helps agents save articles that they want to read later.

Administrators, agents, and internal employees with read access to Knowledge can follow articles, and they can follow articles in any state, such as published or draft. To let Knowledge users follow and unfollow articles, enable feed tracking in **Setup > Chatter > Feed Tracking**.

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

The Knowledge component is automatically added to your sample Lightning Service Console. To add the Knowledge component to a custom Lightning console app, add the Knowledge component to your console's Lightning pages using the Lightning App Builder.




Tip: The Knowledge component isn't limited to the console. You can add it to apps with standard navigation too. Add the Knowledge component to a record's page using the Lightning App Builder.

Let Agents Insert Article Content into Emails in Lightning Knowledge


In the Lightning Knowledge component, agents can directly embed article content into the body of customer emails. You can choose which article fields go into emails for each record type. Instead of sending a URL, your customers can then access the information without going to a website. Agents can send articles that are not published publicly without rewriting or copying an internal article. By using permissions, admins can let specific agents choose which internal articles to share externally while others can send only published, external articles.

Ensure that these setup requirements are met.

- Email-to-case is enabled.
- The case page layout has the SendEmail action. HTML or Text must be in the SendEmail layout.
- Communication channel mappings are configured.

 **Note:** This feature isn't available in **Essentials** edition because record types must be enabled to configure communication channel mappings.

1. From Setup, enter *Knowledge* in the Quick Find box, and select **Knowledge Settings**.
2. Under Article Tool Settings, select **Enable attaching articles inline**.
3. Click **Save**.
4. To specify which article fields are sent in the email, you can edit the communication channel mapping for each record type.
 - a. From the Object Manager, choose the **Knowledge** object.
 - b. Under Communication Channel Mappings, click **New** or **Edit**.
 - c. Enter a label and name.
 - d. Add **Email** to the Selected Channels list.
 - e. Add the fields to include in the body of an email.

 **Note:** You can't include smart links or embed videos in the email. Also, the following fields are not supported:

- isDeleted
- Language
- MultiPicklist and picklist fields
- Publication Status
- Source
- Validation Status

- f. Click **Save**.

Your agents can now send article contents in case emails. Open the console or a case with the Knowledge component or articles related list and select **Insert Article Contents into Email** from the dropdown next to an article. Agents can make changes to the article and email before sending it.

EDITIONS

Available in: Lightning Experience and all editions with Knowledge except **Essentials**.

Salesforce Knowledge is available in **Essentials** and **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To administer Salesforce Knowledge and create, edit, and delete page layouts:

- Customize Application AND Manage Salesforce Knowledge

To send article content in emails in Lightning Knowledge:

- Edit on cases AND read on Knowledge articles AND View Setup and Configuration

To share internal articles externally:

- **Share internal Knowledge articles externally** under Administrative Permissions

Create Persistent Links to Lightning Knowledge Articles

You can manually create a permanent link to a Lightning Knowledge article. The link, called a permanent or static link, points to the latest version of an article in the user's preferred language. You can embed an article link in external sites and documents to provide your users with access to the latest version.

When publishing a link to a Knowledge article, it's important that the link continues to work when a new version of the article is created. To add a link to a Knowledge article within Salesforce, use Smart Links. When you want to publish a link in an external resource, use the format described here to create a static article link. A static link persists across versions and is based on the article's URL name, your Salesforce domain, and a few other pieces of information.



Warning: If you change the URL name in the article record, you must update any links using the original URL name.

1. Open a text file to construct the URL.
2. Open the article that you want to create a link for.
3. In the browser window with your article, copy your Salesforce domain from the address bar into the text file.
For example, in the URL

`https://example.lightning.force.com/lightning/o/Knowledge__kav/list?filterName=00BB00028DpSU`, the domain is `example.lightning.force.com`.

4. In the text file, append the path for the Lightning Knowledge article after your domain.
For example, after your domain string, add `/lightning/articles/KnowledgeBaseName/`, where the Knowledge base name is the label for the object that contains your articles. By default, the label is Knowledge.

If your domain ends in `.com`, your URL now looks like this:

`https://example.lightning.force.com/lightning/articles/Knowledge/`

5. In the article record, locate the URL Name field, and copy the contents to the end of your new URL.



Note: The article URL is case-sensitive, so confirm that the `/lightning/articles/KnowledgeBaseName/` portion of the URL and the capitalization of your article's URL name is correct.

The static URL looks something like this:

`https://cunning-elephant.lightning.force.org/lightning/articles/Knowledge/My-knowledge-article`

6. Optional: Specify the article's language using the ISO code.

EDITIONS

Available in: Lightning Experience

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To view articles:

- Lightning Knowledge User
- AND
- Read on the Knowledge Base object
- AND
- Read on URL Name field

The format for adding the language parameter string is:

`SalesforceDomain/lightning/articles/KnowledgeBaseName/URLName?language=xx_XX`

For example, if the URL name is `shipping-faq` and you want to link to the version in French, your static URL looks like this:

`https://cunning-elephant.lightning.force.org/lightning/articles/Knowledge/shipping-faq?language=fr_FR`


If the URL name is different for each language, use the version-specific name and don't add the language code.

7. Add the static article URL to your external document or page.

Report on Salesforce Knowledge Articles

Use Salesforce Knowledge custom reports to track how articles are created, maintained, and delivered.

As an administrator, you can create custom report types so agents can create reports on Salesforce Knowledge articles. Custom report types are the only way to make reports about articles available for your readers. Salesforce does not provide sample article reports or a standard report folder for articles.

 **Tip:** The *Knowledge Base Dashboards and Reports* AppExchange package provides over two dozen reports that help you monitor the knowledge base and analyze usage metrics.

Create a Folder for Article Reports

Create a public folder where you can store article reports for your users.

Article Reports

Create a custom report type to report on Salesforce Knowledge article data.

Create an Article Report

Run your custom report on your Salesforce Knowledge articles and save them to your article reports folder.

Fields Available on Salesforce Knowledge Reports

The fields you can use in a knowledge report depend on the type of information you are reporting on.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports

Create a Folder for Article Reports

Create a public folder where you can store article reports for your users.

1. In the Report Folder section of the Reports tab, click **Create New Folder**.
2. Enter *Article Reports* in the *Folder Label* field.
3. Optionally, modify the *Group Unique Name*.
4. Choose a *Public Folder Access* option.
Select read/write if you want users to be able to add and remove reports.
5. Choose a folder visibility option.
6. Click **Save**.

Reports you store in this folder are available on the Reports tab.

EDITIONS

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USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports

Article Reports

Create a custom report type to report on Salesforce Knowledge article data.

To create a custom report:

1. From Setup, enter *Report Types* in the Quick Find box, then select **Report Types** and click **New Custom Report Type**.
See [Create a Custom Report Type](#)
2. In the Primary Object drop-down menu, select the article-related object you want to report on:

Primary Object	Description
Article types (Classic Knowledge only)	Compare information such as creation dates, published channels, and number of associated cases for your custom article type, such as an FAQ. To access any history and custom fields for the custom article type, add the article type's version as a secondary object.
Knowledge Articles	Compare information about individual articles, such as their creation dates, published channels, and number of associated cases. If you choose this custom report type, you can also include article view and vote statistics. In reports using the Knowledge Articles primary object, each article has five records (rows): one for each channel (All Channels, Internal App, Customer, Partner, and Public Knowledge Base).
Knowledge Article Searches	Analyze the number of searches per day, month, or year for each channel and role. Searches aren't differentiated between internal and external, and all searches are logged as Internal App. Searches in communities aren't checked.
Knowledge Article Version	Compare information about individual translations, such as their creation dates, published channels, and number of associated cases. If you choose this custom report type, you can also include article view and vote statistics.
Article Version History	Compare information about individual article versions, such as their creation dates, published channels, and number of associated cases.
Knowledge Article Views	Analyze the number of views per day, month, or year for each channel and role.
Knowledge Article Votes	Analyze the number of votes per day, month, or year for each channel and role.
Knowledge Keyword Search	See which keywords users are looking for in your knowledge base.
Knowledge Search Activity	<ul style="list-style-type: none"> Analyze the number of searches per day, month, or year for each channel and language. For each search, see the:

EDITIONS

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USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports

- Date
- ID and title of the article that was clicked
- See which keywords users are looking for in your knowledge base.
- For each keyword, see the average number of:
 - Results
 - Articles that appear in the search results
- For each article, see the average number of:
 - Clicks
 - Unique users who clicked it

3. Complete the required fields and click **Save**.

In the Store in Category drop-down menu, we recommend choosing **Customer Support Reports** or **Other Reports**. This is the category where users find the custom report type on the Reports tab.

4. Make your choices on the Define Report Records Set page.

Primary Object	Available Secondary Objects
Article types (Classic Knowledge only)	Article type Versions
Knowledge Articles	Article View Statistics, Article Vote Statistics, Case Article
Knowledge Article Searches	None
Knowledge Article Version	Article View Statistics, Article Vote Statistics
Article Version History	None
Knowledge Article Views	None
Knowledge Article Votes	None
Knowledge Keyword Search	None
Knowledge Search Activity	None

5. Click **Save**.

6. As needed, remove and rearrange fields from your report layout.

To learn which fields are available on each primary object, see [Fields Available on Salesforce Knowledge Reports](#) on page 28.



Note: An article's score is calculated slightly differently in the API than it is in a custom report. We recommend standardizing on one or the other and not attempting to use both.

Create an Article Report

Run your custom report on your Salesforce Knowledge articles and save them to your article reports folder.

Using your [custom report types](#), create article reports and save them to your [article reports folder](#).

1. On the Reports tab, click **New Report**.
2. Choose the category where your custom report types are stored; for example, **Customer Support Reports** or **Other Reports**.
The Cases with Articles report is available by default in the Customer Support Reports folder.
3. Find your report type and click **Create**.
4. When viewing your report, click **Save As** and save it in the new Article Reports folder to make the report available to other users.



Note:

- In reports using the Knowledge Article custom report type, there are at least five rows per article (one for each channel, including "All Channels").
- Daily values are reported independently for the last 90 days and monthly values for the last 18 months. After those time periods, use the monthly aggregate and yearly aggregate values, respectively.
- In reports using the Knowledge Article Votes, Knowledge Article Views, or Knowledge Article Searches custom report types, each row represents a day, channel, and role combination. For example, if a user with the Kingmaker role views articles in the internal app and the next day the same reader views more articles in the internal app, the Article Views report has two rows: one for each unique date.
- In reports using Knowledge Article Version (KAV), except Knowledge Article Version History, you can filter by data category. You can add up to four filters and set their logic to AT, ABOVE, BELOW, or ABOVE OR BELOW. The logic between filters is OR. You can use the same category group multiple times, however, you must use the same operator each time.
- To report on Approval Processes for Knowledge Articles, use **Process Instance** and **Process Instance Node** when creating a custom report type. Then filter the report on object type, which is the article type.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports

Fields Available on Salesforce Knowledge Reports

The fields you can use in a knowledge report depend on the type of information you are reporting on.

The following tables list the available fields by primary object for Salesforce Knowledge reports.

Fields Available on Article types (Classic Knowledge only) Reports

The Article Type primary object allows you to add a secondary object of the article type version.

Table 2: Article Type Report Primary Object Fields

Field	Description
Archived By	User who archived the article.
Archived Date	Date the article was archived.
Article Number	Unique number automatically assigned to the article.
Article Type ID	The ID associated with the article type.
Case Association Count	Number of cases attached to the article.
Created By	User who created the article.
Created Date	Date the current article version was created. If the article has been published more than once, this is the latest draft date. To create reports that use the original article creation date, first create a Custom Report Type that joins the Knowledge Article (__ka) and Knowledge Article Version (__kav) objects for a given article type to allow for use of the created date on the record in the Knowledge Article object, rather than the one for the Knowledge Article Version record.
Custom fields	Any custom fields created on the article types. Add the article type's version as a secondary object to access any custom fields for the article type.
First Published Date	Date the article was originally published.
Knowledge Article Version	The article's version number.
Last Modified By	User who changed the article most recently.
Last Modified Date	Date the article was last changed. The last modified date of a draft article is the time the draft was saved. The last modified date of a published article is time the article was most recently published.
Last Published Date	Date the article was last published.
Master Language	The original language of the article.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

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Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To create or update custom report types:

- Manage Custom Report Types

To create a public reports folder:

- Manage Public Reports



Note: Currently you can't use Knowledge Article Version and Last Modified Date in the same report.

Table 3: Article Type Report Secondary Object Fields

Field	Description
Archived By	User who archived the article.
Article Type	The article type associated with the article.
Created By	User who created the article.
Created Date	Date the current article version was created. If the article has been published more than once, this is the latest draft date. To create reports that use the original article creation date, first create a Custom Report Type that joins the Knowledge Article (___ka) and Knowledge Article Version (___kav) objects for a given article type to allow for use of the created date on the record in the Knowledge Article object, rather than the one for the Knowledge Article Version record.
Custom fields	Any custom fields created on the article types. Add the article type's version as a secondary object to access any custom fields for the article type.
Is Latest Version	Indicates if the article is the most recent version.
Is Master Language	Indicates that the article is not a translation, but the original article.
Knowledge Article Version ID	Unique ID automatically assigned to the article translation.
Language	The article's language.
Last Modified By	User who changed the article most recently.
Last Modified Date	Date the article was last changed. The last modified date of a draft article is the time the draft was saved. The last modified date of a published article is time the article was most recently published.
Out of Date	Indicates that the master article has been updated since this translation was published.
Publication Status	Indicates whether the article or translation is in progress (draft), published, or archived.
Summary	Description of the article provided by the author.
Title	The article's title.
Translation Completed Date	Date the translation was completed.
Translation Exported Date	Date the article was exported for translation.
Translation Imported Date	Date the translation was imported.
URL Name	Text used as hyperlink for the article.
Validation Status	Indicates if the article is valid or not.
Version Number	The version number of the article.

Field	Description
Visible in Customer	Indicates that the article is published in the Customer Portal.
Visible in Internal App	Indicates that the article is published in the internal app (Articles tab).
Visible in Partner	Indicates that the article is published in the partner portal.
Visible in Public Knowledge Base	Indicates that the article is published in the public knowledge base.

Fields Available on Knowledge Articles Reports

Field	Description
Article Number	Unique number automatically assigned to the article.
Article Type	The article type associated with the article.
Case Association Count	Number of cases attached to the article.
Created By	User who created the article.
Created Date	Date the current article version was created. If the article has been published more than once, this is the latest draft date. To create reports that use the original article creation date, first create a Custom Report Type that joins the Knowledge Article (__ka) and Knowledge Article Version (__kav) objects for a given article type to allow for use of the created date on the record in the Knowledge Article object, rather than the one for the Knowledge Article Version record.
First Published Date	Date the article was originally published.
Is Latest Version	Indicates if the article is the most recent version.
Knowledge Article Version ID	Unique ID automatically assigned to the article translation.
Last Modified By	User who changed the article most recently.
Last Modified Date	Date the article was last changed. The last modified date of a draft article is the time the draft was saved. The last modified date of a published article is time the article was most recently published.
Last Published Date	Date the article was last published.
Summary	Description of the article provided by the author.
Title	The article's title.
URL Name	Text used as hyperlink for the article.
Validation Status	Indicates if the article is valid or not.
Version Number	The version number of the article.
Visible in Customer	Indicates that the article is published in the Customer Portal.
Visible in Internal App	Indicates that the article is published in the internal app (Articles tab).

Field	Description
Visible in Partner	Indicates that the article is published in the partner portal.
Visible in Public Knowledge Base	Indicates that the article is published in the public knowledge base.

Fields Available on Knowledge Article Searches Reports

Field	Description
Channel	The channel that's applicable to the article. Possible values are All Channels, Internal App, Customer, Partner, and Public Knowledge Base.
Count	The number of article searches applicable to the duration shown (day, month, or year).
Cumulative Count	The total number of article searches for the history of the record.
Date	Last date on which an article search took place for the record. All rows represent a date, channel, and role combination.
Duration	The time period the search count is applied to. Possible values are Daily, Monthly, and Yearly. For example, a record where the Count is 70 and the Duration is Monthly indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.
Related Role	Name of the role that applies to the record. Each row in the report represents searches per channel per role.

Fields Available on Knowledge Article Version Reports

Field	Description
Archived By	User who archived the article.
Archived Date	Date the article was archived.
Article Number	Unique number automatically assigned to the article.
Article Type	The article type associated with the article.
Case Association Count	Number of cases attached to the article.
Created By	User who created the article.
Created Date	Date the current article version was created. If the article has been published more than once, this is the latest draft date. To create reports that use the original article creation date, first create a Custom Report Type that joins the Knowledge Article (__ka) and Knowledge Article Version (__kav) objects for a given article type to allow for use of the created date on the record in the Knowledge Article object, rather than the one for the Knowledge Article Version record.
First Published Date	Date the article was originally published.
Is Latest Version	Indicates if the article is the most recent version.

Field	Description
Is Master Language	Indicates that the article is not a translation, but the original article.
Knowledge Article Version ID	Unique ID automatically assigned to the article translation.
Language	The article's language.
Last Modified By	User who changed the article most recently.
Last Modified Date	Date the article was last changed. The last modified date of a draft article is the time the draft was saved. The last modified date of a published article is time the article was most recently published.
Date the article was last published.	Date the article was last published.
Master Language	The original language of the article.
Out of Date	Indicates that the master article has been updated since this translation was published.
Publication Status	Indicates whether the article or translation is in progress (draft), published, or archived.
Summary	Description of the article provided by the author.
Title	The article's title.
Translation Completed Date	Date the translation was completed.
Translation Exported Date	Date the article was exported for translation.
Translation Imported Date	Date the translation was imported.
URL Name	Text used as hyperlink for the article.
Validation Status	Indicates if the article is valid or not.
Version Number	The version number of the article.
Visible in Customer	Indicates that the article is published in the Customer Portal.
Visible in Internal App	Indicates that the article is published in the internal app (Articles tab).
Visible in Partner	Indicates that the article is published in the partner portal.
Visible in Public Knowledge Base	Indicates that the article is published in the public knowledge base.

Fields Available on Knowledge Article Views Reports

You can add up to 6 of the 8 fields below.

Field	Description
Channel	The channel that's applicable to the article. Possible values are All Channels, Internal App, Customer, Partner, and Public Knowledge Base.
Count	The number of article views applicable to the duration shown (day, month, year).
Cumulative Count	The total number of article views for the history of the record.
Date	Last date on which an article view took place for the record. All rows represent a date, channel, and role combination.
Duration	The time period the search count is applied to. Possible values are Daily, Monthly, and Yearly. For example, a record where the Count is 70 and the Duration is Monthly indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.
Related Role	Name of the role that applies to the record.
Score	Article's average view rating. Scoresake into account a half-life calculation. Every 15 days, if an article has not been viewed its average rating moves up or down. This calculation ensures that over time, older or outdated articles don't maintain artificially high or low ratings compared to newer, more frequently viewed articles.
Total Views	Number of times a published article has been viewed.

Fields Available on Knowledge Article Votes Reports


Field	Description
Channel	The channel that's applicable to the article. Possible values are All Channels, Internal App, Customer, Partner, and Public Knowledge Base.
Count	The number of article votes applicable to the duration shown (day, month, year).
Cumulative Count	The total number of article votes for the history of the record.
Date	Last date on which an article vote took place for the record. All rows represent a date, channel, and role combination.
Duration	The time period the search count is applied to. Possible values are Daily, Monthly, and Yearly. For example, a record where the Count is 70 and the Duration is Monthly indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.
Related Role	Name of the role that applies to the record.

Fields Available on Knowledge Keyword Search Reports

Field	Description
Channel	The channel that's applicable to the article. Possible values are All Channels, Internal App, Customer, Partner, and Public Knowledge Base.

Field	Description
Count	The number of keyword searches applicable to the duration shown (day, month, year).
Date	Last date on which a keyword search took place for the record. All rows represent a date, channel, and role combination.
Duration	The time period the search count is applied to. Possible values are <code>Daily</code> , <code>Monthly</code> , and <code>Yearly</code> . For example, a record where the Count is 70 and the Duration is <code>Monthly</code> indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.
Found	Indicates whether the keyword shown was found during a search of the knowledge base.
Keyword	Search term used to search published articles in the knowledge base.

Fields Available on Knowledge Search Activity Reports

Field	Description
Average Click Rank	The order in which the article appeared in search results when results are sorted by relevance and when readers clicked it from the list of results.
Channel	The channel that's applicable to the article. Possible values are <code>All Channels</code> , <code>Internal App</code> , <code>Customer</code> , <code>Partner</code> , and <code>Public Knowledge Base</code> .
Clicked Article Title	The title of the clicked article taken when the search results are sorted by relevance by the reader.
Duration	The time period the search count is applied to. Possible values are <code>Daily</code> , <code>Monthly</code> , and <code>Yearly</code> . For example, a record where the Count is 70 and the Duration is <code>Monthly</code> indicates that 70 searches took place over the past month. Totals are aggregated daily for the current month, monthly from the past full month through the past full year, and yearly beyond that.  Note: Activity totals are collected nightly and aren't in real time.
Language	The language filter that's applied to the reader's search.
Number of Results	The number of search results that were returned for the search term. If Duration is also included, this value is aggregated based on the time period specified.
Number of Searches	The number of searches for the duration that's shown (day, month, or year).
Number of Users	The number of individual users who clicked the article.
Search Date	The date of the search.
Search Term	The first 100 characters of the search term that was used to search published articles in the knowledge base.

Import External Content into Salesforce Knowledge

You can import your existing external articles or information database into Salesforce Knowledge. If you want to move your content from Classic to Lightning Knowledge, use the Lightning Knowledge Migration Tool.

 **Note:** If you are looking for instructions on importing translated articles that you've sent to a localization vendor, see [Import Translated Articles](#) on page 52.

Consider these best practices and requirements as you prepare your articles for import.

- Test your import using a small set of articles.
- Sort your articles by information type. In Classic, import each article type individually. In Lightning Knowledge, you can import articles of multiple record types at once.
- Ensure that each information type has a corresponding record type or, in Salesforce Classic, an article type that matches its structure and content. Create a list of fields available in each article or record type, and verify that your article contents match the structure of each type.
- Verify that the article's [field-level security settings](#) allow you to edit the fields.
- Use rich text fields to import HTML content. Prepare the .html files with the content for each rich text area field. Ensure that the HTML is compliant with the tags and attributes supported in the rich text area field.
- The article importer does not support subfields. If you have fields within fields, adjust your structure and content before importing into Salesforce Knowledge.

Create a .csv File for Article Import

The import file maps the article contents to Knowledge article fields. For example, map a Title column in your .csv file with the standard Title field to import each article's title.

Set Article Import Parameters

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 and field separator used for the import file.

Create an Article .zip File for Import

To complete your article import, create a .zip file with your .parameters, .csv, and .html files, and upload them to Salesforce Knowledge.

Article and Translation Import and Export Status

You can monitor the status of your article imports and exports.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Create a .csv File for Article Import

The import file maps the article contents to Knowledge article fields. For example, map a Title column in your .csv file with the standard Title field to import each article's title.

1. Create a .csv file to import articles.



Note: In Salesforce Classic, you import each article type separately, so you create a .csv file for each article type. In Lightning Knowledge, you can import articles of different types in one .csv file and set the record type during import.

- 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 20 MB and the individual, uncompressed, files within the zip file can't exceed 10 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's fields and metadata, such as title, language, [data categories](#), and channels.
Enter one item in each column. You can use the following fields and metadata to import content.

Field or data	Description
isMasterLanguage	Identifies the article as a master (1) or translation (0). Required to import articles with translations, however, <code>isMasterLanguage</code> can't be in a .csv file to import articles without translations. A translation must follow its master article so that it's associated with the master article preceding it.
Title	The article or translation's title. Required for all imports.
Record Type	Indicates an article's record type, for example, FAQ. Article import requires the 15-character, case-sensitive ID format.
Standard and 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.

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USER PERMISSIONS

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


Field or data	Description
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). Refer to an article type's file field using its API name.
Data category groups	To categorize the imported articles, use category groups. Refer to a category group using its unique name prefixed with <code>datacategorygroup.</code> For example, use <code>datacategorygroup.Products</code> to specify the category group Products.
Channel	To specify where the imported articles are available, use the keyword <code>Channels</code> .
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 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 field or metadata column. You can leave a column blank to skip importing data. For example, if some fields only appear in certain record types, enter values only for the appropriate articles of those types.

 **Important:** All file names are case-sensitive and must exactly match what is in the .csv file.

Consideration	Notes
Standard or custom fields	<p>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.</p> <p> Note: The article importer does not support subfields. If you have fields within fields, adjust your structure and content before importing into Salesforce Knowledge.</p>
Rich text area field	<p>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.</p> <ul style="list-style-type: none"> We recommend that you create one folder for the .html files (for example, <code>/data</code>) and another for images (for example, <code>/data/images</code>). To import images, include the images in an .html file using the <code></code> tag and <code>src</code> attribute. Ensure that the <code>src</code> value is a relative path from the .html file to the image folder.

Consideration	Notes
	<ul style="list-style-type: none"> • Images must be .png, .gif, or .jpeg files. • Each image file can't exceed 1 MB. • If you have multiple rich text area fields, create a separate .html file for the contents of each field. • .html file contents can't exceed the maximum size for its 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	<p> Note: In Lightning Knowledge, custom file fields are replaced with Salesforce Files.</p> <p>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.</p> <ul style="list-style-type: none"> • We recommend that you create a folder for your files (for example, /files). • Each file must not exceed 5 MB.
Category groups	<p>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.</p> <ul style="list-style-type: none"> • 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	<p>Specify articles' channels using the keywords.</p> <ul style="list-style-type: none"> • <code>application</code> for Internal App. If you don't specify a channel, <code>application</code> is the default. • <code>sites</code> for Public Knowledge Base. • <code>csp</code> for Customer.

Consideration	Notes
	<ul style="list-style-type: none"> • <code>prm</code> for Partner. <p>Use the plus (+) symbol to specify more than one channel (for example, <code>application+sites+csp</code> to make an article available in all channels).</p> <p> 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.</p>

 **Example:** The following example shows .csv files to import product offer articles. The first file imports articles without translations. The second .csv file imports articles 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 summary field is optional, and `summary__c` is left blank for some rows. The `RecordTypeId` sets the Product Offer record type for two of the articles, and the “Best Desktop Computer Deals” article is an FAQ.

Title	summary__c	description__c	datacategorygroup .Products	Channels	RecordTypeId
Free Digital Camera Offer	Get the new Digital Camera.	data/freecam.html	Consumer_Electronics	application+csp	012RM0000002Q5M
Best Desktop Computer Deals		data/bestdeals.html	Desktop	application+csp	012RM0000002Q5g
Free Shipping on Laptop and Desktops		data/freeship.html	Laptop+Desktops	application+csp	012RM0000002Q5M

Example `articlesimport.csv` file:

```
Title,summary__c,description__c,datacategorygroup.Products,Channels,RecordTypeId
Free Digital Camera Offer, Get the new Digital
Camera.,data/freecam.html,Consumer_Electronics,application+csp,012RM0000002Q5M
Best Desktop Computer Deals,,data/bestdeals.html,Desktop,application+csp,012RM0000002Q5g
Free Shipping on Laptop and
Desktops,,data/freeship.html,Laptop+Desktops,application+csp,012RM0000002Q5M
```

isMaster Language	Title	summary__c	description__c	datacategorygroup .Products	Channels	Language	RecordTypeId
1	Free Digital Camera Offer	Get the new Digital Camera.	data/freecam.html	Consumer_Electronics	application+csp	en_US	012RM0000002Q5M
0	Libérer l'Offre d'Appareil photo digital	Obtenir le nouvel Appareil photo digital.	data/freecam/fr.html			fr	012RM0000002Q5M

isMaster Language	Title	summary__c	description__c	datacategorygroup .Products	Channels	Language	RecordTypeId
0	Liberte Oferta Digital de Cámara	Consiga la nueva Cámara Digital.	data/freecam/es.html			es	012RM0000002Q5M
1	Best Desktop Computer Deals		data/bestdeals.html	Desktops	application+csp	en_US	012RM0000002Q5g
0	Meilleures Affaires d'ordinateurs de bureau		data/bestdeals/fr.html			fr	012RM0000002Q5g
0	Mejores Tratos de ordenadores		data/bestdeals/es.html			es	012RM0000002Q5g
1	Free Shipping on Laptops and Desktops		data/freeship.html	Laptops+ Desktops	application+csp	en_US	012RM0000002Q5M
0	Libérer Affranchissement sur Portables et Ordinateurs		data/freeship/fr.html			fr	012RM0000002Q5M
0	Liberte Franqueo en Laptops y Ordenadores		data/freeship/es.html			es	012RM0000002Q5M

Example `articletranslationsimport.csv` file:

```
isMasterLanguage,Title,summary__c,description__c,datacategorygroup.Products,Channels,Language,RecordTypeId
1,Free Digital Camera Offer,Get the new Digital
Camera,data/freecam.html,Consumer_Electronics,application+csp,en,012RM0000002Q5M
0,Libérer l'Offre d'Appareil photo digital,Obtenir le nouvel Appareil photo
digital.,data/freecam/fr.html,,,fr,012RM0000002Q5M
0,Liberte Oferta Digital de Cámara,Consiga la nueva Cámara
Digital.,data/freecam/es.html,,,es,012RM0000002Q5M
1,Best Desktop Computer
Deals,,data/bestdeals.html,Desktops,application+csp,en,012RM0000002Q5g
0,Meilleures Affaires d'ordinateurs de
bureau,,data/bestdeals/fr.html,,,fr,012RM0000002Q5g
0,Mejores Tratos de ordenadores,,data/bestdeals/es.html,,,es,012RM0000002Q5g
1,Free Shipping on Laptop and
Desktops,,data/freeship.html,Laptops+Desktops,application+csp,en,012RM0000002Q5M
0,Libérer Affranchissement sur Portables et
Ordinateurs,,data/freeship/fr.html,,,fr,012RM0000002Q5M
0,Liberte Franqueo en Laptops y Ordenadores,,data/freeship/es.html,,,es,012RM0000002Q5M
```


Specify your [import parameters](#) in a property file using key names and corresponding values.


Set Article Import Parameters

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 and field separator used for the import file.

1. Create a file with required parameters, as described in this table.

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

 **Note:** Salesforce does not support UTF-32 character encoding. We recommend using UTF-8. If you use UTF-16 character encoding, ensure that your HTML files specify the right byte-order mark.

 **Note:** Specify only Java date formats. Make sure that the date format is not misleading. For example, if you choose the format `yyyy-M-d`, a date entered as `20111111` 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.

2. Save the file with the `.properties` extension.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience


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USER PERMISSIONS

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

 **Example:** Example offerarticlesimport.properties property file:

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


Create a .zip file and import into Salesforce Knowledge.

Create an Article .zip File for Import

To complete your article import, create a .zip file with your .parameters, .csv, and .html files, and upload them to Salesforce Knowledge.

1. 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.

 **Important:** 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 20 MB and the individual, uncompressed, files within the zip file can't exceed 10 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. From Setup, enter *Import Articles* in the *Quick Find* box, then select **Import Articles**.

3. Then:

- In Lightning Knowledge, select **Knowledge Base** from the dropdown.
- In Salesforce Classic, select the appropriate article type for the imported articles.

4. To select the .zip file, click **Browse**, and then click **OK**.

5. If your import contains translations, select **Contains translations?**

 **Note:** When this option is selected, your .csv file must contain the isMasterLanguage, Title, and Language columns. If this option isn't selected, your .csv file can't contain the isMasterLanguage, but it must contain the Title column. The Language column is optional when importing articles without translations.

USER PERMISSIONS

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

6. Click **Import Now**.

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

Check the [status of your import](#) on the Article Imports page.

Article and Translation Import and Export Status

You can monitor the status of your article imports and exports.

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 one table for article and translation imports and another for exports for translation.

The import information includes:

- Possible actions
- .zip filenames
- Who submitted the import and when
- Status
- Started and completed dates
- Article types

The export information includes:

- Possible actions
- .zip filenames
- Who submitted the export and when
- Status
- Started and completed dates

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Status	Description	Possible Action
Pending	The import or export starts as soon as the current import or export completes.	You can click Cancel to cancel the pending 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 might 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 have already been imported or exported successfully are available in Salesforce.	You can restart an import or export, delete an entry by clicking Del , or receive the completion email and check the details of your import or export by clicking Email Log .

Status	Description	Possible Action
Completed	<p>The import or export is complete.</p> <p>Successfully imported articles are shown on the Article Management tab on the Articles subtab. Successfully imported translations are listed on the Translations subtab.</p>	<p>This status doesn't mean the import or export is successful. Click Email Log to check the details of your import or export.</p> <p>Click the exported .zip file to save or open the file on your system.</p>

Support Articles in Multiple Languages

With multiple languages for Salesforce Knowledge, you can lower support costs by translating articles into the languages your audience prefers. After selecting your language settings, two translation methods are available: translating articles in-house using the editing tool in the knowledge base, or sending articles to a localization vendor. Different languages can use different methods. For example, you may want to export articles to a vendor for French translations, but assign articles to an internal Knowledge user for Spanish translations.

- Before you add languages to your knowledge base, decide for each language whether you want to translate articles directly in Salesforce or export articles to a translation vendor. Communicate your decision to the people involved in the translation process (authors, reviewers, translation managers, publishers).
- When adding a language to your knowledge base, keep in mind that it can't be deleted; however, you can hide a language by making it inactive. Deactivating a language means it no longer appears as a choice in the New Article dialog or the Submit for Translation dialog. Also, if articles are already published in the language, those articles are no longer visible to readers when the language is deactivated.
- You can only add languages supported by Salesforce to your knowledge base.
- To hide translated articles for a specific language, deactivate the language by unchecking **Active** on the Settings page.

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Work with Articles and Translations

The Article Management tab is your home page for working with articles throughout the publishing cycle as they are created, assigned to collaborators, translated, published, archived, and deleted.

Publish Articles and Translations

Publishing articles and translations makes them visible in all channels selected. If you publish an article that has translations, all translations of the article are published as well.

Translate Articles in Lightning Knowledge

If your organization supports a multilingual knowledge base, give agents and authors access to translated articles. Add authoring actions to user profiles so your agents can access master language versions and translation drafts.

Archive Articles and Translations

Archiving removes published articles and translations that are obsolete so they no longer display to agents and customers on your organization's Salesforce Knowledge channels.

[Set Up Master Article and Translation Side-By-Side View](#)

Look at a translated article and do a side-by-side comparison with the master language version of the article. Admins can add a master article component to the page layout so authors can view the master language version beside the translated article.

Work with Articles and Translations

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The Article Management tab is your home page for working with articles throughout the publishing cycle as they are created, assigned to collaborators, translated, published, archived, and deleted.

Agents need the correct permissions on an article's article type and article actions to complete some tasks. For more information see, [Assign Article Actions to Public Groups](#).

To specify which articles appear in the list view, use the following options in the sidebar:

- In the View area, select Draft Articles, Published Articles, or Archived Articles. You can filter draft articles by those assigned to you or those assigned to anyone (all draft articles for your organization).
- If applicable, click the Translations tab in the View area, and select Draft Translations or Published Translations. You can filter draft translations by those assigned to you, those assigned to a translation queue, or those assigned to anyone (all draft translations in your organization).
- To refine the current view, first select an article language filter and then enter a keyword or phrase in the Find in View field. The Find in View field is inactivated for archived articles.
- In the Filter area, choose a category from a drop-down menu to filter the current view.

To modify which columns display, click **Columns**. The following columns are available depending on what is selected in the view area:

Column	Description	View
Action	Displays the actions available for the article or translation.	All articles and translations
All User Ratings	Average ratings from users of your internal Salesforce organization, Customer Portal, partner portal, and your public knowledge base.	Published and archived articles and published translations
Archived Date	Date the article was archived.	Archived articles
Article Number	Unique number automatically assigned to the article.	All articles and translations
Article Title	Click to view the article.	All articles
Assigned to	The user who is assigned work on the article.	Draft articles and translations
Assignment Details	Instructions for the assignment.	Draft articles and translations
Assignment Due Date	Date to complete work on the article. If the date has passed, it displays in red.	Draft articles and translations
Created Date	Date the article was written.	Draft articles and translations
Customer Ratings	Average ratings from users on the Customer Portal and the public knowledge base.	Published and archived articles and published translations

USER PERMISSIONS

To create, edit, or delete articles:

- Manage Articles
- AND
- Create, Read, Edit, or Delete on the article type

To publish or archive articles:

- Manage Articles
- AND
- Create, Read, Edit, and Delete on the article type

To submit articles for translation:

- Manage Articles
- AND
- Create, Read, and Edit on the article type

To submit articles for approval:

- Permissions vary depending on the approval process settings

Column	Description	View
Language	The language an article is translated into.	Draft and published translations
Last Action	The date and type of the last action taken on a translation.	Draft and published translations
Last Modified by	Last person to update the article.	Draft articles and translations
Last Modified Date	Last date the article was edited.	All articles and translations
Most Viewed by all Users	Average views from users of your internal Salesforce organization, Customer Portal, partner portal, and your public knowledge base.	Published and archived articles and published translations
Most Viewed by Customers	Average views from users on the Customer Portal and the public knowledge base.	Published and archived articles and published translations
Most Viewed by Partners	Average views from users on the partner portal and the public knowledge base.	Published and archived articles and published translations
Partner Ratings	Average ratings from users of your partner portal and public knowledge base.	Published and archived articles and published translations
Published Date	Date the article was published.	Published articles and translations
Source Article	The original article before translation. Click the article title to view the article.	Draft and published translations
Translated Article	The title of the translated article. Click the translation title to edit the translation.	Draft and published translations
Translation Status	Status in the translation cycle. Hover over the icon to view the status for each translation. If a translation has been published, there are separate tabs for draft and published translations.	Articles submitted for translation
Type	The article's type, such as FAQ or Product Description, that determines what information the article contains.	All articles
Validation Status	Shows whether the content of the article has been validated.	All articles and translations, when enabled
Version	The article's version. Hover over the version number to view details about other versions of the article.	All articles

On the Article Management tab, you can:

- Find an article or translation by entering a search term or using the category drop-down menu.
- Create an article by clicking **New**.

- Publish an article or translation by selecting it and clicking **Publish...** If you have the “Publish Articles” article action and an approval process is set up for an article, you see both **Publish...** and **Submit for Approval** buttons.
- Modify an article or translation by clicking **Edit** next to it.
- See how an article or translation appears for end users by clicking **Preview** next to it. From the **Channel** drop-down menu you can choose any channel where an article is visible except the public knowledge base.



Note: Voting and Chatter information is not available when previewing a Knowledge article.

- See a list of an article’s or translation’s other versions by clicking its version number.
- Change the owner of an article or translation by selecting it and clicking **Assign....**



Note: All draft articles must have an assignee.

- Send an article or translation to the Recycle Bin by selecting it and clicking **Delete**.
- Archive a published article or translation by selecting it and clicking **Archive....**
- Submit articles for translation by selecting them and clicking **Submit for Translation**. You can set due dates for each language and assign it to another agent or a queue for export to a translation vendor.
- Go directly to the Setup pages for exporting and importing articles for translation with **Export Articles for Translation** and **Import Article Translations** in the Related Links area.

[Support a Multilingual Knowledge Base](#)

Reach a global audience by offering your knowledge base in multiple languages.

[Export Articles for Translation](#)

If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Export Articles for Translation feature in Setup.


[Import Translated Articles](#)

If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Import Article Translations feature in Setup. You can only import articles that have been exported from the same Salesforce organization. For example, you can't export articles from your test or sandbox organization and import them into your production organization.

Support a Multilingual Knowledge Base

Reach a global audience by offering your knowledge base in multiple languages.

1. In Setup, enter *Knowledge Settings* in the Quick Find box, then select **Knowledge Settings**.
2. Click **Edit**.
3. Select **Multiple Languages** and add the languages you want to include in your knowledge base.

 **Important:** You can add the languages that your instance of Salesforce supports. But you can't remove any languages that have been added to your knowledge base.

4. Choose which settings you want to apply to language.

Setting	Description
Active	Active languages appear in the New Article and Submit for Translation dialog boxes. The active/inactive status determines whether a published article is visible. For example, if Spanish articles are published to your partner portal and then you make Spanish an inactive language, the articles no longer appear.
Default Assignee	The default assignee is automatically assigned articles submitted for translation. The default assignee can be either an individual person or a queue.
Default Reviewer	The default reviewer is automatically assigned finished translations that are ready to be reviewed or published. The default reviewer can be either an individual person or a queue.

5. Save your changes.
6. If you want, create queues to distribute and assign articles to groups of people who can either translate them or review the finished translations. When setting up queues, use the Knowledge Article Version object.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To set up multiple languages for Salesforce Knowledge:

- Customize Application AND Manage Salesforce Knowledge


Export Articles for Translation

If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Export Articles for Translation feature in Setup.

Place the articles to be translated in a translation queue. To enable the article export feature, create one or more queues; authors and reviewers select the queue when they submit an article for translation. Make sure that they know which queue to choose for which language.

 **Note:** You can have up to 50 exports in 24 hours and a maximum of 15 pending exports (exports that have not entered a final state such as Completed, Failed, or Canceled).

1. Create a [translation queue](#) with articles for translation.
2. On the Article Management tab, select the articles you want to translate, and click **Submit for Translation**.
3. In the dialog box, indicate which languages to translate the articles into and assign the translations to their corresponding language translation queue.
4. From Setup, enter *Export Articles for Translation* in the Quick Find box, then select **Export Articles for Translation**.
5. Select the queue that contains the articles you're exporting.
6. Select either:
 - **All articles** to export every article in the queue.
 - **Updated articles** to only export articles that have been modified or added.
7. Click **Continue**.
8. Select the source and target language pairs you want to export.

 **Important:** Salesforce creates a separate .zip file for every article type in each language pair. You must retain the .zip file structure for a successful import. For more information, see [Import Translated Articles](#) on page 52.

9. To have the files reviewed or published after being translated, select a user or a queue.
10. Select the file character encoding.
 - ISO-8859-1 (General US & Western European, ISO-LATIN-1)
 - Unicode
 - Unicode (UTF-8) *default*
 - Japanese (Windows)
 - Japanese (Shift_JIS)
 - Chinese National Standard (GB18030)
 - Chinese Simplified (GB2312)
 - Chinese Traditional (Big5)
 - Korean
 - Unicode (UTF-16, Big Endian)
11. Select the delimiter for the .csv files.

The delimiter is the separator for columns when the file is converted to table form. Your options are tab (default) or comma.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To export articles:

- Manage Salesforce Knowledge

AND

Manage Articles

AND

Manage Knowledge
Article Import/Export

To view articles:

- Read on the article type

To create articles:

- Read and Create on the article type

12. Click **Export Now**.

You're notified by email when your export is complete. You can also check the status of your export by viewing the Article Import and Export Queue. From Setup, enter *Article Imports and Exports* in the **Quick Find** box, then select **Article Imports and Exports**.

Unzip the exported files, but retain the file structure for a successful import.

Import Translated Articles


If your organization sends Salesforce Knowledge articles to a vendor for translation, use the Import Article Translations feature in Setup. You can only import articles that have been exported from the same Salesforce organization. For example, you can't export articles from your test or sandbox organization and import them into your production organization.

1. From Setup, enter *Import Article Translations* in the **Quick Find** box, then select **Import Article Translations**.
2. Choose how Salesforce handles translations after they're imported.

Option	Description
Review imported translations on the Article Management tab before publishing	Add imported translations to a queue from which agents can review them.
Publish translations immediately on import	Publish imported translations without reviews.

3. Select the language of the articles you're importing.
4. If you chose to have articles reviewed before publishing, select to send the files to a user or a queue.
5. Click **Browse**, choose the translation .zip file to upload, and click **Open**.

You must place all the translation files (meaning, those exported from Salesforce and translated by your vendor) in a folder whose name is the same as the language code. For example, put French articles in an *fr* folder. Zip up this folder to create your import file.

 **Important:** To import translated articles successfully, verify that the file structure and their extensions match the file structure and extensions of files exported from Salesforce Knowledge for translation. For example, if the target language is French, the file structure begins as follows:

```
import.properties
-fr
--articletypearticlename_kav
---articlename.csv
---[Article collateral, html, images, etc.]
```

6. Click **Import Now**.

If you have more translated articles to upload, repeat steps four through six.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To export articles:

- Manage Salesforce Knowledge
- AND
- Manage Articles
- AND
- Manage Knowledge Article Import/Export

To view articles:

- Read on the article type

To create articles:

- Read and Create on the article type

7. Click **Finish**.

An email notification is sent to you when your import finishes. You can view the status of your import from Setup by entering *Article Imports and Exports* in the Quick Find box, then selecting **Article Imports and Exports**.


Publish Articles and Translations

Publishing articles and translations makes them visible in all channels selected. If you publish an article that has translations, all translations of the article are published as well.

You can publish an article or translation from the Article Management tab or the article’s or translation’s detail page. To publish in Classic Knowledge, you need the publish permission on an article’s article type and the “Publish Articles” or “Publish Translated Articles” article action to publish an article or translation. To publish in Lightning Knowledge, you need the associated User Profile perms.

When publishing articles keep the following in mind.

- You can choose to publish directly or schedule publishing for a future date. Articles you scheduled for publication later continue to appear in the Draft Articles filter, now with the pending icon (🕒) next to the article title. To see the publication date, hover over the icon.

 **Tip:** To cancel a scheduled publication, click **Cancel Publication** on the article or translation detail or edit page.
- An article in an approval process might be sent to a queue to be published even if it is scheduled to publish immediately. This happens when the article is very large, there are many active languages, or there are many other articles to publish at that time. To mitigate performance issues, the article is sent to a queue until it can be published successfully, usually within minutes. Also, note that the Last Modified By field shows **Automated Process** as the last user to modify the article.
- If the draft being published is a working copy of a currently published article, it is published as a new version of the original.
- For articles and translations that have already been published, select the Flag as new version checkbox to make the new article icon (🌟) display next to your article in the selected channels. Readers from these channels can see that this article has been modified since the last time they’ve read it. This checkbox is not available when you publish an article for the first time, as the icon displays by default for new articles.
- If you assign an article that is scheduled for publication, you also cancel the scheduled publication.
- Scheduling a publication removes any assignment information. The user who scheduled the publication is assigned to the article.
- Conflicts might occur when different agents perform actions on the same articles simultaneously. Depending on who performs the action first, the articles will not be available for subsequent users though the articles still display momentarily in the articles list. Performing an action on these articles results in a conflict error.
- If you have the “Publish Articles” article action and an approval process is set up for an article, you see both **Publish...** and **Submit for Approval** buttons.

EDITIONS

Available in: Salesforce Classic (not available in all orgs) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

Table 4: Publishing Actions Available in Translated Articles



Action	Translated Article Version Where Action is Exposed
Assign	Draft Master, Draft Translation
Submit for Translation	Draft Master, Published Master
Publish	Draft Master, Draft Translation

Action	Translated Article Version Where Action is Exposed
Archive	Published Master
Edit	Draft Master, Draft Translation
Edit as Draft	Published Master
Delete	Draft Master, Draft Translation
Change Record Type	Draft Master
Submit for Approval	Draft Master

Translate Articles in Lightning Knowledge

If your organization supports a multilingual knowledge base, give agents and authors access to translated articles. Add authoring actions to user profiles so your agents can access master language versions and translation drafts.

Depending on the status of your translation, and the authoring actions assigned to your user profile, you can do the following from the translation detail page.

Action	Description	Article Status
Archive	Archiving removes published translations that are obsolete so they no longer display to agents and customers on your organization's Salesforce Knowledge channels.	To archive a translation, archive its master article.
Assign...	Assigns changes to the owner of the translation	Draft translations
Delete	Deleting a translation permanently removes it from the knowledge base.  Note: You can't undelete a draft translation.	Draft translations
Edit	Editing modifies the translation's content or properties.	Draft and published translations
Preview	Previewing shows how the translation appears to end users.  Note: Voting and Chatter information is not available when	Draft and published translations

EDITIONS

Available in: Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To work with translated articles:

- Manage Articles

AND

Create, Read, Edit, Delete, or Article Translation-Submit for Translation (depending on the actions assigned to the user profile)

Action	Description	Article Status
	previewing a Knowledge article.	
Publish...	Publishing translations makes them visible in all channels selected.	Draft translations
Submit for Translation	Creates translation drafts for the current Master Language Version	

To add authoring actions to a page layout created specifically for translations:

1. Click the **Object Manager** tab and select the **Knowledge** object.
2. Select a page layout from the **Page Layout** list. For example, a page layout that has already been created for translated articles.
3. From **Mobile and Lightning Actions**, drag **Publish**, **Edit**, **Delete**, **Assign**, and **Submit for Translation** actions onto the page.
4. Save your changes.

Archive Articles and Translations

Archiving removes published articles and translations that are obsolete so they no longer display to agents and customers on your organization's Salesforce Knowledge channels.

You can archive published articles and translations on the Article Management tab. You can choose to archive either real time (now) or schedule the archival.

Articles you're archiving now move directly to the Archived Articles view. Articles you scheduled for archiving later continue to display on the Published Articles view, now with the pending icon (🕒). Hover over the icon to see the archive date. On the archive date, the article automatically moves to the Archived Articles view.



Note:

- Conflicts might occur when different agents perform actions on the same articles simultaneously. Depending on who performs the action first, the articles will not be available for subsequent users though the articles still display momentarily in the articles list. Performing an action on these articles results in a conflict error.
- If you edit a published article that is scheduled for archiving, you also cancel the archiving.
- If an article has a published translation with a draft version, on archive, the draft version is deleted. Published translations are archived along with the article.



Tip: To cancel a scheduled archive, click **Cancel Archive** on the article detail page.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Set Up Master Article and Translation Side-By-Side View

Look at a translated article and do a side-by-side comparison with the master language version of the article. Admins can add a master article component to the page layout so authors can view the master language version beside the translated article.

To set up Master Version and Translated Article viewing:

1. From Setup, select the **Object Manager** tab.
2. From the **Object Manager**, select the **Knowledge** object. Then select the **Lightning Record Page**.
3. Click **Edit**, which takes you to the **Lightning App Builder**.
4. Create a Translations tab in the right column and name it, *Translations*.
5. Drag the **Translation Master Article** component onto the new Translations page.
6. Set component visibility filters, as needed. For example, if you set the filter to *Is Master Language Equal False*, then the master article component doesn't show up. When you are on the master language record (and you are not viewing the same version of the article in both columns).

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in the **Unlimited** Edition with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Essentials**, **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

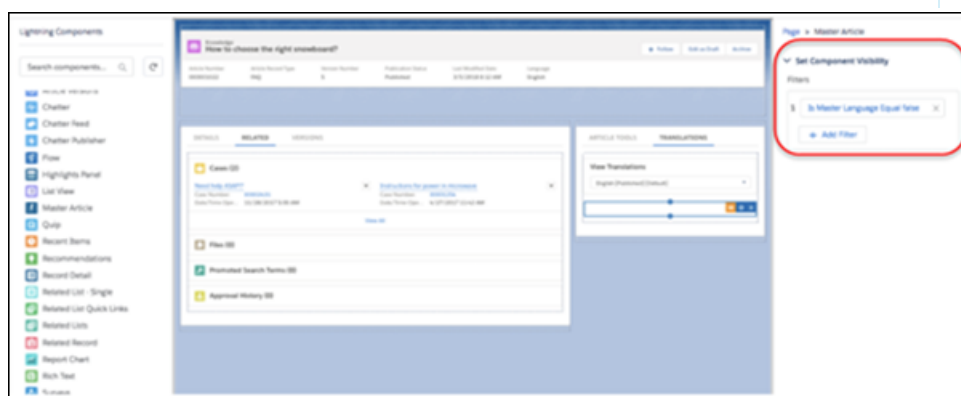
USER PERMISSIONS

To set up:

- Manage Salesforce Knowledge AND Manage Articles

To view articles:

- Allow View Knowledge



7. Save and activate the page.

Define Data Categories for Your Lightning Knowledge Articles

Create data categories and data category groups to help Knowledge users and customers find what they need. Some data category information doesn't apply to Lightning Knowledge.

Work with Data Categories

Data categories are used in Salesforce Knowledge (articles and article translations), Ideas, Answers, and Chatter Answers to help classify and find articles, questions, or ideas. You can use data categories to control access to a particular set of articles, questions or ideas.

Create and Modify Category Groups

Category groups are used by Salesforce Knowledge (articles), answers (questions), or ideas. In all cases, category groups are containers for individual data categories. For example, a Contracts category group might contain Fixed Price, Cost Reimbursement, and Indefinite Delivery categories.

Add Data Categories to Category Groups

Once you have category groups, you can add data categories to help agents classify and find articles, questions, or ideas.

Filter Articles with Data Category Mapping

Make suggested articles more relevant when solving cases. Map case fields to data categories to filter for articles assigned to those data categories. For example, cases with a field for which product they are about can be mapped to the data category of that product. Articles assigned that category or product, are filtered to the top of the suggested article list.

Data Category Visibility

Data category visibility can be set with roles, permission sets, or profiles. Data category visibility determines the individual data categories, categorized articles, and categorized questions that you can see.

EDITIONS

Available in: Salesforce Classic, Lightning Experience

Salesforce Knowledge is available in **Performance** and **Developer** Editions and in **Unlimited** Edition with the Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, and **Unlimited** Editions.

Work with Data Categories

Data categories are used in Salesforce Knowledge (articles and article translations), Ideas, Answers, and Chatter Answers to help classify and find articles, questions, or ideas. You can use data categories to control access to a particular set of articles, questions or ideas.

Salesforce Knowledge uses data categories to classify articles and make them easier to find. For example, to classify articles by sales regions and products, create two category groups: Sales Regions and Products. The Sales Regions category group could consist of a geographical hierarchy, such as All Sales Regions as the top level and North America, Europe, and Asia at the second level. The Products group could have All Products as the top level and Phones, Computers, and Printers at the second.

Data Category Limits	Details
Maximum number of data category groups and active data category groups	5 category groups, with 3 active at a time
Maximum number of categories per data category group	100 categories in a data category group
Maximum number of levels in data category group hierarchy	5 levels in a data category group hierarchy
Maximum number of data categories from a data category group assigned to an article	8 data categories from a data category group assigned to an article

In an answers zone, data categories help organize questions for easy browsing. Each answers zone supports one category group. For example, if you're a computer manufacturer you might create a Products category group that has four sibling categories: Performance Laptops, Portable Laptops, Gaming Desktops, and Enterprise Desktops. On the Answers tab, zone members can assign one of the four categories to each question and then browse these categories for answers to specific questions.



Example:

Logical Classification of Articles

As a knowledge base administrator, you can organize your knowledge base articles into a logical hierarchy and tag articles with the attributes that are significant to your business.

Easy Access to Questions

As an answers administrator, you can choose which data categories are visible on the Answers tab. Zone members can tag a question with a category, which makes finding questions and answers easier for other members.

Control of Article and Question Visibility

As a knowledge base or answers community administrator, you can centrally control the visibility articles or questions by mapping roles, permission sets, or profiles to categories in the category groups. When an article or question is categorized, users with visibility can automatically see it.

Article Filtering

As a support agent, when articles are classified into logical categories, you can quickly and easily locate the article you need by filtering your organization's knowledge base. To ensure you see all relevant articles, filtering by category has expansive results that include a category's upward and downward relatives in the category hierarchy. For example, if your category hierarchy for products has the levels All Products > Computers > Laptops > Gaming Laptops and you are helping a customer with a laptop problem, filtering by Laptops returns articles classified with Laptops as well as articles classified with Computers,

EDITIONS

Available in: Salesforce Classic and Lightning Experience.

Data categories and answers are available in **Enterprise, Performance, Unlimited, and Developer** Editions.

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

All Products, or Gaming Laptops. Effectively, you are made aware of useful related articles like a free shipping offer for all products or an upgrade offer for gaming laptops. (To prevent irrelevant results, category filtering doesn't return nonlinear relatives like siblings and cousins. Articles about Desktops, a sibling of Laptops, would not display.)

Article and Question Navigation

As an end user, you can navigate the categories on the Articles tab or Answers tab to find the information you need to solve your problem.

Managing Category Groups for Articles and Questions

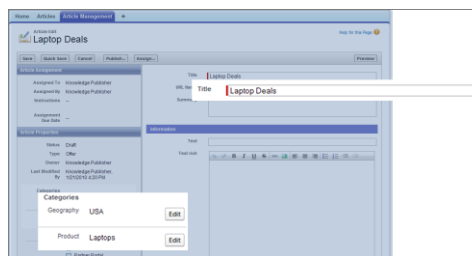
If your organization has Salesforce Knowledge and an answers community, you can create separate category groups or use the same category group for articles and questions.

Data Categories in Articles

A category group is the container for a set of categories. In Salesforce Knowledge it corresponds to the name of the category drop-down menus. For example, if you use the Data Categories page in Setup, (enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**) to create and activate a category group called Products, a Products menu displays on the Article Management tab, the article edit page, the Articles tab in all channels, and the public knowledge base.

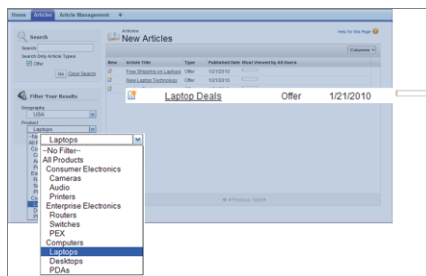
As an illustration, the figure below shows a knowledge base administrator's view of an article about laptop deals; using the article edit page, the administrator has classified the article with Laptops in the Products category group, and USA in the Geography category group.

An Article About Laptop Deals on the Article Management Tab



The next figure now illustrates an agent finding that same article published on the Articles tab; the agent has selected Laptops and USA respectively in the Products and Geography drop-down menus to retrieve an article that is classified with both Laptops and USA.

An Article About Laptop Deals on the Articles Tab

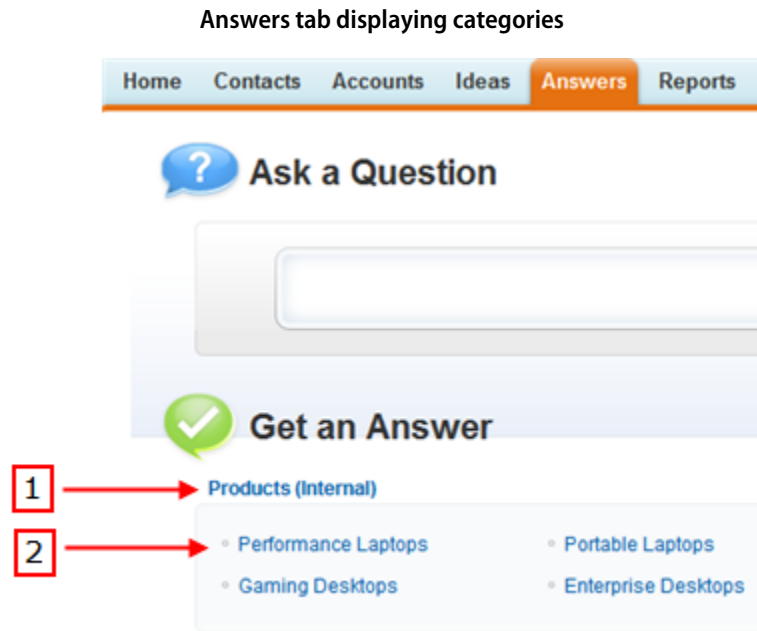


When you add categories to a category group, you build a hierarchy that can contain up to five levels of depth and up to 100 categories total. Each category can have one parent, many siblings, and many children. A robust and well-organized category hierarchy helps users find the articles that are relevant to them quickly and easily.

By default, all Salesforce Knowledge users have access to all categories; however, you can [restrict category visibility by role, permission set, or profile](#).

Data Categories in Answers Zones

An answers zone supports one category group, and members can assign one category to each question. Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions. The categories within the group display on the Answers tab below the zone name.



By default, all zone members have access to all categories; however, you can [specify category visibility](#).

Data Category Implementation Tips

Consider the following information when planning and implementing data categories for your organization:

- You can create up to three category groups with a maximum of five hierarchy levels in each group. Each category group can contain a total of 100 categories.
- If you want to use data categories with Answers, after creating your category group you must assign it from Setup by entering *Data Category Assignments* in the **Quick Find** box, then selecting **Data Category Assignments** under Answers. You can only assign one category group to an answers community. Salesforce Knowledge supports multiple category groups.
- Even though you can create up to five hierarchy levels of categories in a category group, only the first level of categories is supported in your answers community. Child categories below the first level are not displayed in the community, and community members can't assign these child categories to questions. Salesforce Knowledge supports a hierarchy of data categories.
- Category groups are hidden from users until they are activated. Do not activate a category group until you have finished defining its categories and their access settings, including their visibility.
- When assigning categories to articles, you can choose up to eight categories in a category group.
- If an article has no categories, it displays only when you choose the **No Filter** option in the category drop-down menu.
- When searching for articles or article translations, selecting a category automatically includes the parent and children of that category and any grandparents, up to and including the top level. Sibling categories are not included. For example,

if a category hierarchy has the levels All Products, Switches, Optical Networks, and Metro Core, selecting “Optical Networks” from the category drop-down menu returns articles assigned to any of the four categories. However, if the Switches category has a sibling category called Routers, selecting “Optical Networks” does not return articles classified within Routers. Category visibility settings may limit the specific articles you can find.

- Once [visibility settings](#) have been chosen for the categories:
 - Users who are not assigned visibility can only see uncategorized articles and questions unless [default category visibility](#) has been set up.
 - For role-based visibility, Customer Portal users and partner portal users inherit the category group visibility settings assigned to their account managers by default. You can [change the category group visibility settings](#) for each portal role.
 - If you only have access to one category in a category group, the category drop-down menu for that category group does not display on the Articles tab.
- Deleting a category:
 - Permanently removes it. It cannot be restored. It never appears in the Recycle Bin.
 - Permanently deletes its child categories.
 - As applicable, removes the category and its children from the Answers, Article Management, and Knowledge tabs in all channels, and your company's public knowledge base.
 - Removes associations between the category and articles or questions. You can reassign articles and questions to another category.
 - Removes its mapping to visibility. Readers lose their visibility to articles and answers associated with the deleted category.
- Deleting a category group:
 - Moves it to the Deleted Category Groups section, which is a recycle bin. You can view items in this section but not edit them. It holds category groups for 15 days before they are permanently erased and cannot be recovered. During the 15-day holding period, you can either restore a category group, or permanently erase it immediately.
 - Deletes all categories within that group.
 - Removes all associations between the group's categories and articles or questions.
 - Removes all associations between the group's categories and visibility.
 - As applicable, removes the category drop-down menu from the Articles tab in all channels, the Article Management tab, and your company's public knowledge base.
- You can translate the labels of categories and category groups using the Translation Workbench.

Best Practices for Data Categories

Consider the following tips when using data categories:

- To quickly manage data categories, use [keyboard shortcuts](#).
- After creating or updating categories, set up [category group visibility rules](#).
- Save your changes frequently. The more actions you perform before clicking Save, the longer it takes to save.

Create and Modify Category Groups

Category groups are used by Salesforce Knowledge (articles), answers (questions), or ideas. In all cases, category groups are containers for individual data categories. For example, a Contracts category group might contain Fixed Price, Cost Reimbursement, and Indefinite Delivery categories.

1. From Setup, enter *Data Category* in the **Quick Find** box, then select **Data Category Setup**.
2. To create a 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. 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** up to a maximum of 80 characters. 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** (the 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.

Activating Category Groups

When you add a category group, it's deactivated by default and only displays on the administrative setup pages for Data Categories, Roles, Permission Sets, and Profiles. Keep your category groups deactivated to set up your category hierarchy and assign visibility. Until you manually activate a category group, it does not display in Salesforce Knowledge or your answers community. In addition to activating the category group, for answers communities you must assign the category group to a zone before the categories are visible on the Answers tab.

To activate a category group so it is available to users, move the mouse pointer over the name of the category group and click the **Activate Category Group** icon (🔑).

You can now [add categories](#) to your category group. When you create a category group, Salesforce automatically creates a top-level category in the group named **A11**. Optionally, double-click **A11** to rename it.

EDITIONS

Available in: Salesforce Classic and Lightning Experience.

Data categories and answers are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To view the Data Categories page:

- View Data Categories

To create, edit, or delete data categories:


- Manage Data Categories

Add Data Categories to Category Groups

Once you have category groups, you can add data categories to help agents classify and find articles, questions, or ideas.


Administrators can create data categories for Salesforce Knowledge articles, questions in a zone, or ideas to classify and find articles, questions, or ideas. You can also use data categories to control access to articles, questions, and ideas.

By default, you can create up to 100 categories in a data category group and have up to 5 levels in a data category group hierarchy. To request more categories or hierarchy levels, contact Salesforce.

 **Note:** On the Answers tab, only first-level data categories display. Therefore, when creating data categories for a portal or community, ensure that the categories you want visible have a sibling relationship and not a parent-child relationship.

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 up to a maximum of 40 characters.
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.

EDITIONS

Available in: Salesforce Classic and Lightning Experience.

Data categories and answers are available in **Enterprise**, **Performance**, **Unlimited**, and **Developer** Editions.

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To view the Data Categories page:

- View Data Categories

To create, edit, or delete data categories:

- Manage Data Categories

Filter Articles with Data Category Mapping

Make suggested articles more relevant when solving cases. Map case fields to data categories to filter for articles assigned to those data categories. For example, cases with a field for which product they are about can be mapped to the data category of that product. Articles assigned that category or product, are filtered to the top of the suggested article list.

Important:

- Filtering articles based on case information is only supported in text and picklist fields.
- Filters are applied to Knowledge results after the case has been saved.
- Filters are applied after a Knowledge search and only to the articles returned in the search.
- Using Filters does not return a list of all articles that match the filter criteria. Instead, the filters are applied to the initial pool of article results returned.
- Results may be filtered after a search.
- A category group can only be used once in a data category mapping.
- Suggested articles are returned if `Suggest articles for cases considering case content` is enabled. When suggested articles is disabled, search uses data category mappings. Case subject fields are used when there are no data category mappings.

To implement data category mapping, select which case fields map to which data categories and set a default data category for cases that have no value for the mapped fields.

For information on data categories, see [Work with Data Categories](#) on page 58.

1. From Setup, enter *Data Category Mappings* in the Quick Find box, then select **Data Category Mappings**.
2. In the `Case Field` column, use the drop-down list to add a field.
3. In the `Data Category Group` column, use the drop-down list to map the information from the lookup field to a data category.
4. In the `Default Data Category` column, use the drop-down list to assign a data category when the field value does not match any categories from the category group.
5. Click **Add**.

EDITIONS

Available in: Salesforce Classic ([not available in all orgs](#)) and Lightning Experience

Salesforce Knowledge is available in **Essentials** and **Unlimited** Editions with Service Cloud.

Salesforce Knowledge is available for an additional cost in: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To map data category groups

- Customize Application AND Manage Salesforce Knowledge

Data Category Visibility

Data category visibility can be set with roles, permission sets, or profiles. Data category visibility determines the individual data categories, categorized articles, and categorized questions that you can see.


There are three types of visibility:

- All Categories: All categories are visible
- None: No categories are visible
- Custom: Selected categories are visible

With custom data category visibility, you can only see the data categories permitted by their role, permission sets, or profile.

Visibility Setting Enforcement

To ensure a wide range of relevant information, category group visibility is broadly interpreted. Setting a category as visible makes that category and its entire directly related family line—ancestors, immediate parent, primary children, other descendants—visible to users. For example, consider a Geography category group with continents such as Asia and Europe at the top level, various countries at the second level, and cities at the third level. If France is the only visible category selected, then you can see articles classified with Europe, France, and all French cities. In other words, you can see categories that have a direct vertical relationship to France but you cannot see articles classified at or below Asia and the other continents.


 **Note:** Only the first-level categories in the category group are visible on the Answers tab. In the Geography example, only the continent categories appear on the Answers tab; therefore, if France is the category selected as visible in category group visibility settings, zone members can see questions classified with Europe.

Category group visibility settings are enforced on the Answers tab, the Article Management tab, the Articles tab in all channels (internal app, partner portal, Salesforce.com Community, and Customer Portal), and the public knowledge base. In the following areas, users only see the categories that their visibility settings allow:

- On the Article Management tab, when creating or editing articles
- On the Article Management tab and the Articles tab, the category drop-down menu for finding articles
- On the Answers tab, the categories listed below the zone name

Initial Visibility Settings

If role, permission set, or profile data category visibility has not been set up, all users can see all data categories. However, if data category visibility is set up, users who are not assigned data category visibility by a role, permission set, or profile, only see uncategorized articles and questions unless you make the associated categories visible by default. Role, permission set, and profile visibility settings restrict default visibility settings. For example, if a data category is visible by default, it is not seen by a user whose role restricts access to that data category.

 **Note:** If data category visibility is defined with roles, permission sets, and profiles, Salesforce uses a logical OR between the definitions to create a visibility rule for each user.

Role-Based Visibility Setting Inheritance

Child roles inherit their parent role's settings and are kept in sync with changes to the parent role. You can customize and reduce the child role's visibility, but you cannot increase it to be greater than that of the parent role. By default, Customer Portal users and partner portal users inherit the category group visibility settings assigned to their account managers. You can change the category

EDITIONS

Available in: Salesforce Classic and Lightning Experience.

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Salesforce Knowledge is available for an additional cost in: **Professional, Enterprise, Performance, and Developer** Editions. For more information, contact your Salesforce representative.

group visibility settings for each portal role. Because high-volume portal users don't have roles, you must designate visibility settings by permission set or profile before these users can view categorized articles and questions.

Categorized Article Visibility

User's can see an article if they can see at least one category per category group on the article. For example, consider an article that is classified with *California* and *Ohio* in the Geography category group and *Desktop* in the Products category group:

- If you have visibility on Ohio and Desktop (but not California), you can see the article.
- If you don't have visibility on either California or Ohio but do have visibility on Desktop, you do not see the article.
- If you have visibility on California but not Desktop, you do not see the article.

Revoked Visibility

Data category visibility can be revoked (set to **None**) for a particular category group. Users in the target role, permission set, or profile can only see articles and questions that aren't classified with a category in that category group. For example, if a user's role has revoked visibility in the Geography category group but visibility to the Products category group, he or she can only see articles that have no categories in Geography and are classified with a category in Products. Because an answers zone can only be assigned to one category group, if the Geography category group was assigned to the zone and a member's role visibility was revoked for that group, the member could only see uncategorized questions.

For a detailed example, see [Category Group Article Visibility Settings Examples](#)

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