Salesforce Knowledge Guide (Classic)

Salesforce, Spring '24

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CREATE A KNOWLEDGE BASE WITH SALESFORCE KNOWLEDGE

Give website visitors, customers, partners, and service agents the ultimate support tool. Create a knowledge base of articles that can be securely shared.

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 and can be used internally or externally in a range of channels. You can publish articles in customer and partner sites and public websites or share articles in social posts and emails. Control where and what information is published or shared based on the article page layouts, user profiles, actions, and other settings.

You can use Knowledge in both Salesforce Classic and Lightning Experience. Orgs new to Knowledge use Lightning Knowledge, which is generally available. If your org already uses Knowledge in Salesforce Classic, consider using the Lightning Knowledge Migration Tool and switching to Lightning Knowledge.

> **Note:** 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. Before enabling Lightning Knowledge, orgs with multiple articles types require data migration to consolidate article types. Test in a sandbox or trial org before enabling in production.

PLAN YOUR KNOWLEDGE BASE IN SALESFORCE CLASSIC

It's important that you consider your individual company's needs while you develop a strategy for capturing and publishing your support team's expertise. With a robust knowledge base, customers receive service faster or even solve their own issues.

Setting up Salesforce Knowledge is a "choose your own adventure" procedure. There are many features and options and it's up to you to decide which ones are right for your enterprise.

> 💡 **Tip:** Not sure if you heard… Knowledge is available in Lightning Experience! To save yourself time and enjoy the full power of the Salesforce platform, we recommend getting started with Lightning Knowledge. Going forward, new features are available exclusively in Lightning Knowledge.

Consideration	Further Information
What types of articles and information do you want to include in the knowledge base?	Build Your Knowledge Base in Salesforce Classic, Knowledge Article Types
Who can write the articles?	Classic Knowledge User AccessKnowledge User License
Who needs to read what information and where?	Knowledge User License, User Setup, Classic Knowledge User Access, Create Public Groups for Knowledge, Assign Article Actions to Public Groups
Do you need to categorize your information?	Work with Data Categories, Data Category Visibility
Do you need to enhance search?	Improve the Article Search Experience, Enable Topics for Articles, Enable Suggested Articles to Solve Cases
Do you need workflow or approval processes to manage article creation and publication?	Knowledge Management, Validation Rules, Workflow and Approvals for Articles
Do you have an existing Knowledge base or documentation that you need to import?	Import External Content into Salesforce Knowledge
Are you supporting more than one language?	Support a Multilingual Knowledge Base
Do you need agents to follow articles in Chatter?	Feed Tracking
Do you need to share your knowledge base externally?	Give Customers Access to Your Knowledge Base Through Help Center
Do you need guidelines, resources, and current discussions on the evolving world of knowledge base orientated service?	Salesforce Knowledge is "KCS Verified" by the Consortium for Service Innovation, which recognizes best practices in customer support methodologies. By implementing

Consideration	Further Information
	Knowledge-Centered Support (KCS) features, you can create more efficient collaboration within your team and provide pertinent and accurate information to your customers.

Consider the following tips when planning and using Salesforce Knowledge:

- Create synonym groups in Salesforce Knowledge. Synonyms are words or phrases that are treated as equivalent in article searches, letting you optimize search results.
- Before setting up data categories, carefully plan your category groups and their hierarchies. Also, consider how your category hierarchy maps to your role hierarchy. For more information, see Data Category Visibility.
- Create custom reports on your Salesforce Knowledge data. You can also install the *Knowledge Base Dashboards and Reports* app from the AppExchange to receive over two dozen helpful reports.
- Multiple agents can edit the same article at the same time. If that occurs, your changes can be overwritten by a colleague without warning, even if you save your work frequently. To avoid accidental data loss, instruct all users who edit articles to edit only the articles they're assigned.
- Review your usage regularly to avoid storage shortages: from Setup, enter `Storage Usage` in the `Quick Find` box, then select **Storage Usage**.
- Public knowledge base users cannot rate articles.
- The File custom field type allows agents to attach documents to articles.
- You will lose your data if you convert a custom field on an article type into any other field type. Do not convert custom fields unless no data exists for the field.
- When renaming Salesforce Knowledge labels note that standard field names, like title and type, are fixed. These fields do not change the labels on the article create and edit pages. If the organization is set to another language, these fields remain in the fixed label for that language.
- The Salesforce Knowledge search engine supports lemmatization, which is the process of reducing a word to its root form. With lemmatization, a search can match expanded forms of a search term. For example, a search for `running` matches items that contain *run*, *running*, and *ran*.
- Make sure that you have a clear understanding of the type of articles your organization needs, and how agents interact with these article types. This determines the article type permissions and article actions that you need to assign to Salesforce Knowledge users, which you can then use to create the set of profiles or permission sets required by your organization. For more information, see Classic Knowledge User Access on page 36.
- Determine if you need to create workflow rules for some of your article types. For example, you can create a rule that sends an email to an article manager when an agent creates an article upon closing a case.
- Determine if you need to create approval processes for some of your article types. For example, if you have a type of article that must have legal and management approval before it can be published externally, create an approval process for the article type.

Knowledge Base Allocations by Edition

The following table lists the total minimum number of languages, articles, and versions per article permitted for each Salesforce edition by default. Each Salesforce edition also has a default maximum number of languages, articles, and versions per article, as well. You can view the default maximum limits here. For orgs created before the Spring '18 release, the default limit for all editions is 16 languages. To request an extension for these allocations, contact Salesforce support.

> **Note:** If you require more than the allocated default maximum, you can ask Salesforce Support to increase the article limits.

Edition	Article, Version, and Language Allocations
Essentials	500 articles, 10 versions per article, 1 language
Professional	500 articles, 10 versions per article, 1 language
Enterprise	50,000 articles, 10 versions per article, 5 languages
Developer	50,000 articles, 10 versions per article, 5 languages
Unlimited	150,000 articles, 10 versions per article, 10 languages

If you require more than the allocated default maximum, you can ask Salesforce Support to increase the article limits. Limits on versions retained per article don't include versions linked to objects such as cases, work items, and undeletable lookup fields. So, for example, an article might have 25 versions, even if the default limit is 10 versions per article, if 15 of those versions are linked to cases. However, versions attached to objects such as cases count towards the total number of versions per org.

KNOWLEDGE SCALABILITY

Every Salesforce Knowledge article can have several versions: one draft, one published, and several archived versions, and each of these versions can have multiple translations. Thus, the total number of article *versions* in an org can be much higher than the number of *articles*. When scaling your org, pay attention to both the total number of article versions and edition-specific limits on articles.

Each Salesforce edition has its own limits on Knowledge articles, versions, and language translations. Also, all editions share a maximum limit of total article versions allowed. Keep all of these limits in mind when scaling your org.

The total number of Knowledge articles in an org is calculated as follows.

Total # of versions = (# of articles) *x* (# of retained[1] versions per article) *x* (# of translations per version)

For example, if you have 100,000 articles, each with a total of 5 versions (1 draft, 1 published, 3 archived), and 5 translations of each of those versions, you have 2,500,000 total article versions.

So in calculating your capacity needs, and determining which edition you need, think *versions*. Do you have a multilingual customer base with lots of translations? Do you have a rigorous editing process with many drafts? Do you keep archived versions of articles around for a long time?

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Edition	Article, Version, and Language Allocations
Essentials	500 articles, 10 versions per article, 1 language
Professional	500 articles, 10 versions per article, 1 language
Enterprise	50,000 articles, 10 versions per article, 5 languages
Developer	50,000 articles, 10 versions per article, 5 languages
Unlimited	150,000 articles, 10 versions per article, 10 languages

If you require more than the allocated default maximum, you can ask Salesforce Support to increase the article limits. Limits on versions retained per article don't include versions linked to objects such as cases, work items, and undeletable lookup fields. So, for example, an article might have 25 versions, even if the default limit is 10 versions per article, if 15 of those versions are linked to cases. However, versions attached to objects such as cases count towards the total number of versions per org.

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[1] "Retained" articles can include not just versions you've created, but versions attached to other objects, such as cases or work items.

Monitoring Article and Version Counts

To see how many versions and articles you have:

- Go to Settings.
- In the Search box, type *Storage Usage*.
- Select **Storage Usage**.

The total number of versions in the org is listed under "Knowledge Versions." The number of articles in the org is listed under "Knowledge."

KNOWLEDGE LIMITATIONS IN THE SALESFORCE MOBILE APP

Knowledge articles are available in the Salesforce apps for Android version 8.0 or later and iOS, version 10.0 or later. Learn what's different or not available in the app.

Articles are supported in the Salesforce for Android apps version 8.0 or later and in the Salesforce for iOS apps, version 10.0 or later, with these limitations:

Issue	Android Downloadable App, v8.0 or later	iOS Downloadable App, v10.0 or later
Only published articles are available—not draft or archived articles.	■	■
Articles can't be created, edited, translated, or archived.	■	■
Articles can't be linked to cases. (But links that are set up from the desktop site can be viewed on the Related tab.)	■	■
Smart links aren't supported.	■	■
Article ratings aren't supported.	■	■
Tables are sometimes cut off on the right side when included in article rich text fields.	■	
Compact layouts display the article type API name instead of the article type name. So users see the article type API name in the highlights area when viewing an article.	■	■
When searching from the Articles home page, only articles in the user's language are returned and only if that language is an active Knowledge language (from Setup, **Customize** > **Knowledge** > **Knowledge Settings**). To see articles in another language, users can change to an active Knowledge language. From **My Settings**, use the Quick Find search box to locate the Language & Time Zone page.	■	■
In global search, search results show articles in the language specified for the device, regardless of the active Knowledge language.	■	
Filtering search results by data categories, article type, validation status, or language isn't available.	■	■
In global search, articles don't appear in the list of recent records.	■	■
In global search results, search highlights and snippets don't appear. These features are available in all versions of the Salesforce mobile app when searching from the Articles home page.	■	■
Knowledge articles aren't available when accessing Experience Cloud sites via the Salesforce mobile app.	■	■

BUILD YOUR KNOWLEDGE BASE IN SALESFORCE CLASSIC

Create a library of knowledge articles in Salesforce Classic. Before you get started, assign Knowledge User licenses to yourself and your team.

> 💡 **Tip:** Not sure if you heard… Knowledge is available in Lightning Experience! To save yourself time and enjoy the full power of the Salesforce platform, we recommend getting started with Lightning Knowledge. Going forward, new features are available exclusively in Lightning Knowledge.

To ensure that your organization has Knowledge User licenses, from Setup, enter `Company` in the Quick Find box, then select **Company Information**. Knowledge User licenses are listed near the bottom of the page, in the Feature Licenses related list.

To ensure that you are a Salesforce Knowledge user, from your personal settings, enter `Personal` in the Quick Find box, then select **Personal Information**. The Knowledge User checkbox is in the second column of the User Detail section.

To enable Salesforce Knowledge, from Setup, enter `Knowledge` in the Quick Find box, then select **Knowledge Settings**. Confirm that you want to enable Salesforce Knowledge and click **Enable Knowledge**. If your org doesn't have an article type, a default article type is created.

> 📝 **Note:** If you enabled Knowledge before Spring '16 you must create an article type first. After the Spring '16 release, you no longer need to create an article type first.

Knowledge Settings
From the Knowledge Settings page, you can create a knowledge base experience for your support agents, partners, and customers.

Knowledge Article Types
Article types, such as FAQs and Tutorials, provide the format and structure to control how an article displays for each audience, known as a channel. For each article type you can create custom fields, customize the layout by adding or removing sections and fields, and choose a template for each channel. You can also create workflow rules and approval processes to help your organization track and manage article creation and publication.

Classic Knowledge User Access
Specify which agents in your company are Classic Knowledge users and give them access to article actions. Create user profiles with the user permissions they need, and then assign them 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`.

Workflow and Approvals for Articles
Creating processes where Knowledge experts review, validate, and approve articles for publication is critical to creating a trustworthy knowledge base. Implementing approval processes with Salesforce Knowledge gives you more control over the content and publication of your articles.

Create Workflow Actions for Knowledge

Knowledge actions are templates that link a workflow action to an article type. When knowledge actions are enabled, you can use them to link article types to specific workflow article actions, such as publishing. For example, if you want each FAQ to publish as a new version when it completes the approval process, you can create a knowledge action that links an FAQ article to the **Publish as New** action. Then, when you create an approval process for FAQs, select the new Knowledge action.

Modify Default Category Group Assignments for Articles

Salesforce Knowledge uses data categories to classify articles. Data categories are organized in category group. After creating category groups, admins decide which groups to use for Salesforce Knowledge articles. For example, if your org uses both the Answers and Salesforce Knowledge, you might want one category group to be used by the answers site and two other category groups for articles. Answers and articles can use the same category group. Authors can assign up to eight data categories from one category group to an article so that users searching for articles can find and filter by category. By default, all the category groups you create are assigned to Salesforce Knowledge

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.

Set Up the Knowledge One Widget

Knowledge One is available as a widget that you can plug in to the Salesforce Console for Service or Salesforce Console for Sales. If you are using the Knowledge tab, you get the same easy-to-use interface for articles and external sources on cases and within the Salesforce Console for Service. You can search, send, and create articles, all without leaving the case.

Knowledge Settings

From the Knowledge Settings page, you can create a knowledge base experience for your support agents, partners, and customers.

To set up or edit your knowledge base, from Setup, enter `Knowledge Settings` in the Quick Find box, select **Knowledge Settings**, then click **Edit**.

Feature or Option	Description
General Settings	
Allow agents to create and edit articles from the Article or Knowledge tab	Enables agents to edit articles without going to the Article Management tab. Agents can click Edit to open the article edit page. If a published version of the article exists, they can view the published version or edit the current version. If a draft version exists, they can continue with editing the existing draft, but must carefully review the draft so that they don't overwrite unpublished changes. This setting applies to Knowledge only in Salesforce Classic.
Activate Validation Status field	Adds a Validation Status field to all Salesforce Knowledge articles. Agents can select values to show whether the content of the article has been validated or not.

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: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

Feature or Option	Description
Allow agents to add external multimedia content to HTML in the standard editor	Allows <iframe> elements in the standard editor to embed multimedia content from the Dailymotion, Vimeo, and YouTube websites. Agents can simply cut and paste <iframe> HTML into the editor.
Enable Lightning Knowledge	Enables Lightning Knowledge. After you enable Lightning Knowledge, you can't disable it.
Article Summaries	
Show article summaries in article list views	For each channel, decide whether an article's summary details display beneath the article's title in search results.
Knowledge One	
Switch from the Articles tab to the Knowledge tab	To switch users from the Articles tab to the Knowledge tab, add the `Knowledge One` permission to their profiles.
Suggest related articles on cases	In the Knowledge tab, Search suggests articles based on content similarity and links to similar cases. If no article links to a similar case, you'll receive suggested articles with similar titles or common keywords in admin-selected case fields. Suggested articles are available in the Salesforce Console for Service and your portals when you view existing or new cases. If the suggested articles aren't relevant, the user working the case can search with specific keywords, which can result in different article results.
	The list of suggested Knowledge Articles are stored in a cache that updates periodically. If you're not receiving relevant Knowledge Articles, try again later.
	By default, the Subject field is selected. Choose up to five of the available short text fields that include a description of the issue, the affected product, or the case topic. We recommend choosing short text fields to return more relevant results. Only the first 255 characters of the content from all admin-selected fields are searched.
Highlight relevant article text within search results	In the Knowledge tab, Search generates a snippet of the relevant article text with the search terms bolded.
Auto-complete keyword search	In the Knowledge tab, Search suggests the three most popular keyword searches performed on the Knowledge tab. Suggestions are based on the channel (internal, customer, partner, or public) the reader is searching. Keyword search history is refreshed one time a day.
Auto-complete title search	Search on the Knowledge tab suggests up to three articles with matching titles.
Language Settings	

Feature or Option	Description
Default Knowledge Base Language	The primary language used for writing articles. It defaults to your organization's language. We recommend that your Default Knowledge Base Language and your organization's language are the same.
Single or Multiple Language	If you support more than one language, select **Multiple Languages** and choose the translation settings. If you enable multiple languages, you can't revert to a single language knowledge base.
Case Settings	

Allow agents to create an article from a case	This setting applies to Knowledge only in Salesforce Classic. When this option is selected, agents can create a draft article that is attached to the case when the article is published using one of the following options.
	
	• Create articles using the simple editor only when closing cases.
	• Create articles using the standard editor anytime an agent creates an article. Make sure that users have Manage Articles, Read, and Create permissions. Designate the following:
	
	  – The default article type from the dropdown list.
	  – For articles created when closing a case, assign the article to a user.
	  – Help agents create articles fast by selecting an Apex class that pre-populates fields on the draft. By default, the Title field in all draft articles contains the case subject. If you enable this option, click **Layout Properties** on each case-close page layout, and select **Enable submissions during case close and Submit Articles**.

Use a profile to create article PDFs	By default, when a user creates an article PDF directly from a case, the PDF includes all the article fields visible to that user. If you want PDFs generated according to a different profile, for example, a profile that hides certain fields from customers, select **Use a profile to create customer-ready article PDFs on cases**, and choose the profile that determines field visibility. This setting applies to Knowledge only in Salesforce Classic.
Enable list of cases linked to an article	Agents and Salesforce Knowledge managers can see a list of cases an article is attached to. This view helps validate that the article is the right solution for a case and shows which articles are used most, without running a report. The Linked Cases related list • Is visible on the detail or preview page of any article that has been published at least one time. • shows a maximum of 200 cases.

Feature or Option	Description
	• is sorted in descending order by the date the article was linked to the case. The sort order can't be changed. • doesn't appear on archived articles or a translation's edit and detail pages. • doesn't appear for external users such as portal or Experience Cloud users or on the Salesforce app.
Share Article via URL Settings	
Allow agents to share articles via public URLs	You can share an article that is available on a public knowledge base with a URL. In the Available Sites list, select the sites you want to allow your agents to send URLs from and add them to the Selected Sites list. Agents can then email customer service clients with a URL to link directly to the article in your public knowledge base.
Answers Settings	
Allow agents to create an article from a reply	When this option is selected, members of an answers site or Chatter Answers site can convert helpful replies into articles. The article type you select determines which fields appear on the draft article. However, on all articles the Title contains the question and the Summary contains the reply. After a reply is promoted to an article, the original reply has a status message indicating its association with the draft article. When the article is published, the message on the reply includes a link to the article.
Chatter Questions Settings	
Display relevant articles as users ask questions in Chatter (also applies to Experience Cloud sites with Chatter)	Shows similar questions and relevant Salesforce Knowledge articles when a user enters a question in the Search field.
Knowledge Statistics Settings	
Enable thumbs up or down voting for article	With this option, the article VoteStat report (which by default only contains totals for star ratings) includes totals for the thumbs up or down ratings.

Enable Knowledge One with Permission Sets

To switch users from the Articles tab to the Knowledge tab, add the `Knowledge One` permission to their permission sets.

Enable Knowledge One with Profiles

To switch users from the Articles tab to the Knowledge tab, add the `Knowledge One` permission to their profiles.

Example Apex for Submitting Articles from Cases

If your organization allows customer-support agents to create Salesforce Knowledge articles while closing a case, you can use Apex to pre-populate fields on draft articles. To do so, create an Apex class and assign it to the case article type using the example below as a guide.

Use Videos from Any Provider with a Custom Visualforce Page

Using a custom Visualforce page and the HTML editor, you can insert videos from any provider into your Salesforce Knowledge articles.

Enable Knowledge One with Permission Sets

To switch users from the Articles tab to the Knowledge tab, add the `Knowledge One` permission to their permission sets.

To add the `Knowledge One` permission to a permission set:

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

2. Click the permission set you want to add the Knowledge One permission to.

3. In the 🔍 🔍 **Find Settings...** box, enter *Knowledge*.

4. Select **Knowledge One** from the list of suggestions.

5. Click **Edit**.

6. Under `Knowledge Management`, check the Enabled check box for `Knowledge One`.

7. Click **Save**.

8. Ensure each user has at least a Read permission on at least one article type.

Once Knowledge One is available for your users, define your external data sources. Your external data sources appear under your articles both in the search results and the left-side panel.

EDITIONS

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

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USER PERMISSIONS

To create or edit permission sets:
- Manage Profiles and Permission Sets

To create and edit external data sources:
- Customize Application

Enable Knowledge One with Profiles

To switch users from the Articles tab to the Knowledge tab, add the `Knowledge One` permission to their profiles.

To add the `Knowledge One` permission to a profile:

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

2. Click the profile you want to add the Knowledge One permission to.

3. In the 🔍🔍 **Find Settings...** box, enter *`Knowledge`*.

4. Select **Knowledge One** from the list of suggestions.

5. Click **Edit**.

6. Under `Knowledge Management`, check `Knowledge One`.

7. Click **Save**.

8. Ensure each user has at least a Read permission on at least one article type.

Once Knowledge One is available for your users, define your external data sources. Your external data sources appear under your articles both in the search results and the left-side panel.

Example Apex for Submitting Articles from Cases

If your organization allows customer-support agents to create Salesforce Knowledge articles while closing a case, you can use Apex to pre-populate fields on draft articles. To do so, create an Apex class and assign it to the case article type using the example below as a guide.

For more information on the syntax and use of Apex, see the Lightning Platform Apex Code Developer's Guide.

Set up the example by creating the following article type, field, and data categories. Do not change the default API Name assigned to each new object.

1. Create an article type called *FAQ*.

2. Create a text custom field called Details.

3. Create a category group called *Geography* and assign it a category called *USA*.

4. Create a category group called *Topics* and assign it a category called *Maintenance*.

   Now, create and assign the Apex class.

5. From Setup, enter *Apex Classes* in the Quick Find box, then select **Apex Classes** and click **New**.

6. To specify the version of Apex and the API used with this class, click **Version Settings**.

   If your organization has installed managed packages from the AppExchange, you can also specify which version of each managed package to use with this class. Use the default values for all versions. This associates the class with the most recent version of Apex and the API, as well as each managed package. You can specify an older version of a managed package if you want to access components or functionality that differs from the most recent package version. You can specify an older version of Apex and the API to maintain specific behavior.

7. In the Apex Class text box enter the following script and click **Save**:

```
public class AgentContributionArticleController {
    // The constructor must take a ApexPages.KnowledgeArticleVersionStandardController
 as an argument
    public
AgentContributionArticleController(ApexPages.KnowledgeArticleVersionStandardController
 ctl) {
        SObject article = ctl.getRecord();   //this is the SObject for the new article.

                                        //It can optionally be cast to the proper
 article type, e.g. FAQ__kav article = (FAQ__kav) ctl.getRecord();

        String sourceId = ctl.getSourceId(); //this returns the id of the case that was
 closed.
        Case c = [select subject, description from Case where id=:sourceId];

        article.put('title', 'From Case: '+c.subject);  //this overrides the default
 behavior of pre-filling the title of the article with the subject of the closed case.
        article.put('Details__c',c.description);

        ctl.selectDataCategory('Geography','USA');  //Only one category per category
```

```
group can be specified.
        ctl.selectDataCategory('Topics','Maintenance');
    }
```

8. From Setup, enter `Knowledge Settings` in the `Quick Find` box, then select **Knowledge Settings** and click **Edit**.

9. Verify the case settings; using our example, the **Default article type** should be FAQ.

10. From the Use Apex Customization menu, select **AgentContributionArticleController** and click **Save**.

As a result of this example, when agents create an article from the case-close screen:

- The data from the `Description` field on the case appears in the `Details` field of the article.
- The title of the article contains *From Case:* and the case subject.
- The article is automatically assigned to the *USA* data category and the *Maintenance* data category.

Use Videos from Any Provider with a Custom Visualforce Page

Using a custom Visualforce page and the HTML editor, you can insert videos from any provider into your Salesforce Knowledge articles.

For example, create a Visualforce page:

```
<apex:page showHeader="false" showChat="false" sidebar="false">
    <iframe width="560" height="315"
        src="http//myvideo.provider.com/embed/{!$CurrentPage.parameters.VideoID}"
```

```
        frameborder="0" allowfullscreen="true">
    </iframe>
</apex:page>
```

Then, with the HTML editor, authors can reference videos using this code:

```
<iframe frameborder="0" height="315"
    src="https://<salesforce_instance>/apex/Video?videoID=12345"
    width="560">
</iframe>
```

Knowledge Article Types

Article types, such as FAQs and Tutorials, provide the format and structure to control how an article displays for each audience, known as a channel. For each article type you can create custom fields, customize the layout by adding or removing sections and fields, and choose a template for each channel. You can also create workflow rules and approval processes to help your organization track and manage article creation and publication.

Create Article Types
An article type controls how an article displays and what type of information of fields are included.

Add Custom Fields to Article Types
Create custom fields to store information that is important to your articles. The only standard fields provided on article types are: Article Number, Summary, Title, and URL Name. At minimum, you want to create a field where authors can write the body of the article.

Article Type Page Layouts
Article-type layouts determine which fields agents can view and edit when entering data for an article. They also determine which sections appear when users view articles. The article-type template defines the format of the article, for example whether layout sections display as subtabs or as a single page with links. You can apply a layout per profile per article type. Therefore, you can display more sensitive fields of the same article to only those agents with the correct profile.

Control Data Integrity with Validation Rules
Ensure that your article content is compliant with your company standards. Create validation rules for each article type to check whether required fields have the appropriate values based on the article's status.

Article History Tracking (Salesforce Classic)
You can track the history of certain fields in articles. If you have history tracking enabled, open an article of that type and click **Version** to see a version history list. You can also set tracking for the article type and track the full history of an article and its versions. Article events are tracked for up to 18 months.

Article Type Templates
Article types in Salesforce Knowledge require a template for each channel. The standard article-type templates—Tab and Table of Contents—specify how the sections in the article-type layout appear in the published article. For example, if you choose the Tab template, the sections defined in the layout appear as tabs when users view an article. With the Table of Contents template, sections appear on a single page with hyperlinks to each section. You can also create a custom template using Visualforce. Custom templates aren't associated with the article-type layout.

Deleting article types can result in errors and lost data. Read this entire topic carefully before deleting article types.

Create Article Types

An article type controls how an article displays and what type of information of fields are included.

📝 **Note:** Before agents can access article types, you must set object permissions for article types.

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

Field	Description
Label	A name used to refer to the article type in any user interface pages.
Plural Label	The plural name of the object. If you create a tab for this object, this name is used for the tab.
Gender	If it is appropriate for your organization's default language, specify the gender of the label. This field appears if the organization-wide default language expects gender. Your personal language preference setting does not affect whether the field appears. For example, if the organization's default language is English and your personal language is French, you are not prompted for gender when creating an article type.
Starts with a vowel sound	If it is appropriate for your organization's default language, check if your label is preceded by "an" instead of "a".
Object Name	(Read only) A unique name used to refer to the article type when using the Lightning Platform API. In managed packages, this unique name prevents naming conflicts on package installations. The Object Name field can contain only underscores and alphanumeric characters. It must be unique, begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Description	An optional description of the article type. A meaningful description helps you remember

Field	Description
	the differences between your article types when you are viewing them in a list.
Track Field History	Select this option to track the full history of an article and its versions. The system records and displays field updates, publishing workflow events, and language versions for the primary article and any translations.
Deployment Status	Indicates whether the article type is visible outside Setup. **In Development** means that article managers can't choose this article type when creating articles. Only select **Deployed** after you are done creating the article type.

4. Click **Save**.

On the article type detail page:

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

Add Custom Fields to Article Types

Create custom fields to store information that is important to your articles. The only standard fields provided on article types are: Article Number, Summary, Title, and URL Name. At minimum, you want to create a field where authors can write the body of the article.

Before you begin, determine the type of custom field you want to create.

📝 **Note:** Authors can view the `URL Name` when they create or edit an article. The `URL Name` does not appear to end users viewing published articles.

1. From Setup, enter `Knowledge Article Types` in the `Quick Find` box, then select **Knowledge Article Types**.

2. Select an article type.

3. Click **New** in the Fields related list.

4. Choose the type of field to create, and click **Next**.

5. Enter a field label. The field name is automatically populated based on the field label you enter.

   This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

6. Enter any field attributes, such as `Description`, and click **Next** to continue.

   📝 **Note:** You cannot enter a default value for any custom field.

7. Set the field-level security to determine whether the field is visible and editable or read only for specific profiles, and click **Next**. Field-level security allows you to control which fields are visible in different channels.

8. If you do not want the field to be added automatically to the article-type layout, uncheck `Yes, add this custom field to the layout`.

9. Click **Save** to finish or **Save & New** to create more custom fields.

10. Optionally rearrange your custom fields on the article-type layout.

📝 **Note:** Creating fields can require changing many records at once. To process these changes efficiently, Salesforce might queue your request and send an email notification when the process has completed.

⚠ **Warning:** You lose your data if you convert a custom field on an article type into any other field type. Do not convert a custom field on an article type unless no data exists for the field.

Custom Fields for Articles
The first step in creating a custom field for articles is choosing the field type.

Field-Level Security on Articles
Field-level security lets administrators restrict readers' access to specific fields on detail and edit pages. For example, you can make a "Comment" field in an article visible for Internal App profiles but not for public Experience Cloud profiles.

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: **Professional**, **Enterprise**, **Performance**, and **Developer** Editions. For more information, contact your Salesforce representative.

USER PERMISSIONS

To create or change custom fields:
- Customize Application

  AND

  Manage Salesforce Knowledge

Custom Fields for Articles

The first step in creating a custom field for articles is choosing the field type.

Field Type	Description
`Article Currency`	In a multiple currency org, an article can have an article currency field to set the article's currency ISO code.
`Currency`	Lets agents enter a currency amount. The system formats the field as a currency amount, which can be useful if you export data to a spreadsheet application. You can make this field required to ensure that an agent enters a value before saving an article.
	Salesforce uses the round-half-to-even tie-breaking rule for currency fields. For example, 23.5 becomes 24, 22.5 becomes 22, −22.5 becomes −22, and −23.5 becomes −24.
	Values lose precision after 15 decimal places.
`Date`	Lets agents enter a date or pick a date from a popup calendar. In reports, you can limit the data by specific dates using any custom date field. You can make this field required to ensure that an agent enters a value before saving an article.
`Date/Time`	Lets agents enter a date or pick a date from a popup calendar, and enter a time of day. They can also add the current date and time by clicking the date and time link next to the field. The time of day includes AM or PM notation. In reports, you can limit the data by specific dates and times using any custom date field. You can make this field required to ensure that an agent enters a value before saving an article.
`Email`	Lets agents enter an email address, which is validated to ensure a proper format. Character limit is 80. If this field is specified for contacts or leads, agents can choose the address when clicking **Send an Email**. You can't use custom email addresses for mass emails. You can make this field required to ensure that an agent enters a value before saving an article.
`File`	Lets agents upload and attach a file to an article. You can make this field required to ensure that

Field Type	Description
	an agent enters a value before saving an article. Note the following caveats about File fields:
	• The maximum attachment size is 25 MB.
	• You can add up to 5 File fields to each article type; contact Salesforce to increase these limits.
	• If the `Disallow HTML documents and attachments` security setting is enabled, File fields do not support HTML files.
	• Text content in a File field attachment is searchable. You can search up to 25 MB of attached files on an article. For example, if an article has six 5-MB file attachments, the first 4.16 MB of each file is searchable.
	• You cannot attach Salesforce CRM Content files using the File field.
	• The File field type is not supported in Developer edition.
	• The filename cannot exceed 40 characters.
	• You cannot convert a File field type into any other data type.
	File Fields are available in Salesforce Classic only.
`Formula`	Lets agents automatically calculate values based on other values or fields such as merge fields.
	Salesforce uses the round half up tie-breaking rule for numbers in formula fields. For example, 12.345 becomes 12.35 and −12.345 becomes −12.35.
	In Database.com, the Formula editor does not provide a **Check Syntax** button. Syntax checking occurs when the agent attempts to save the formula.
`Lookup Relationship`	Creates a relationship between two records so you can associate them with each other. For example, opportunities have a lookup relationship with cases that lets you associate a particular case with an opportunity. A lookup relationship creates a field that Lets agents click a lookup icon and select another record from a window. On the associated record, you can then display a related list to show all the records that are linked to it. You can create lookup relationship fields that link to users, standard objects, or custom objects. If a lookup field references a record that has been deleted, Salesforce clears the value of the lookup field by default. Alternatively, you can choose to prevent records from being deleted if they're in a lookup relationship. You can make this field required to ensure that an agent enters a value before saving an article.
	Lookup relationship fields are not available in Personal Edition.

Field Type	Description
	Lookup relationship fields to campaign members are not available; however, lookup relationship fields from campaign members to other objects are available.
Number	Lets agents enter any number. This entry is treated as a real number and any leading zeros are removed. You can make this field required to ensure that an agent enters a value before saving an article.
	Salesforce uses the round half up tie-breaking rule for number fields. For example, 12.345 becomes 12.35 and −12.345 becomes −12.34. Salesforce rounds numbers referenced in merge fields according to the user's locale, not the number of decimal spaces specified in the number field configuration.
Percent	Lets agents enter a percentage number, for example, '10'. The system automatically adds the percent sign to the number. You can make this field required to ensure that an agent enters a value before saving an article.
	If the decimal value is greater than 15, and you add a percent sign to the number, a runtime error occurs.
	Values lose precision after 15 decimal places.
Phone	Lets agents enter any phone number. Character limit is 40. You can make this field required to ensure that an agent enters a value before saving an article.
	Salesforce automatically formats it as a phone number.
Picklist	Lets agents select a value from a list you define.
Picklist (Dependent)	Lets agents select a value from a list dependent on the value of another field.
Picklist (Multi-select)	Lets agents select more than one picklist value from a list you define. These fields display each value separated by a semicolon.
Text	Lets agents enter any combination of letters, numbers, or symbols. You can set a maximum length, up to 255 characters. You can make this field required to ensure that an agent enters a value before saving an article.
Text Area	Lets agents enter up to 255 characters that display on separate lines similar to a Description field. You can make this field required to ensure that an agent enters a value before saving an article.
Text Area (Long)	Lets agents enter up to 131,072 characters that display on separate lines similar to a Description field. You can set the length of this field type to a lower limit, if desired. Any length from 256 to

Field Type	Description
	131,072 characters is allowed. The default is 32,768 characters. Every time an agent presses Enter in a long text area field, a line break and return character are added, and both count toward the character limit. Also, smart links add more characters than what is displayed.
	If you lower the character limit and you have articles that surpass the new limit, the articles can't be edited until the limit is reset higher than their character counts.
Text Area (Rich)	Lets agents enter up to 131,072 characters of HTML-supported text, including code samples ( ) and smart links between Salesforce Knowledge articles.
	• You can have up to 100 links to different Salesforce Knowledge articles in one rich text field.
	• When you convert a text area (rich) field to a text area (long) field, links are displayed as link reference numbers, not URLs.
	• The upgraded editor doesn't support Internet Explorer version 7 or version 8 in compatibility mode. If you are using these browsers, use the older editor.
URL	Lets agents enter up to 255 characters of any valid website address. When agents click the field, the URL opens in a separate browser window. Only the first 50 characters are displayed on the record detail pages. You can make this field required to ensure that an agent enters a value before saving an article.

Field-Level Security on Articles

Field-level security lets administrators restrict readers' access to specific fields on detail and edit pages. For example, you can make a "Comment" field in an article visible for Internal App profiles but not for public Experience Cloud profiles.

If using both article-type layout and field-level security to define field visibility, the most restrictive field access setting always applies. For example, if a field is hidden in the article-type layout, but visible in the field-level security settings, the layout overrides security settings and the field aren't visible. Some user permissions override both page layouts and field-level security settings. For example, users with the "Edit Read Only Fields" permission can always edit read-only fields regardless of any other settings.

> ⛔ **Important:** Field-level security doesn't prevent searching on the values in a field. When search terms match on field values protected by field-level security, the associated records are returned in the search results without the protected fields and their values.

You can define security via a permission set, profile, or field.

To define field-level security via permission sets or profiles:

1. For permission sets or profiles, from Setup, either:

   - Enter *Permission Sets* in the Quick Find box, then select **Permission Sets**, or

   - Enter *Profiles* in the Quick Find box, then select **Profiles**

2. Select a permission set or profile.

3. Depending on which interface you're using, do one of the following:

   - Permission sets or enhanced profile user interface—In the **Find Settings...** box, enter the name of the object you want and select it from the list. Click Edit, then scroll to the Field Permissions section.

   - Original profile user interface—In the Field-Level Security section, click **View** next to the object you want to modify, and then click **Edit**.

4. Specify the field's access level.

   > 📝 **Note:** These field access settings override any less-restrictive field access settings on the article-type layouts.

5. Click **Save**.

To define field-level security via fields:

1. For fields, from Setup, enter *Knowledge Article Types* in the Quick Find box, then select **Knowledge Article Types**.

2. Select the article type that contains the field to modify.

3. Select the field and click **Set Field-Level Security**.

4. Specify the field's access level.

   > 📝 **Note:** These field access settings override any less-restrictive field access settings on the article-type layouts.

5. Click **Save**.

After setting field-level security, you can modify the article-type layouts to organize the fields on detail and edit pages.

Article Type Page Layouts

Article-type layouts determine which fields agents can view and edit when entering data for an article. They also determine which sections appear when users view articles. The article-type template defines the format of the article, for example whether layout sections display as subtabs or as a single page with links. You can apply a layout per profile per article type. Therefore, you can display more sensitive fields of the same article to only those agents with the correct profile.

> 💡 **Tip:** You can also use field-level security to hide fields on article types. For example, if you publish the same article in the internal app and on an Experience Cloud site, you can use field-level security to hide a custom field such as `Internal Comments` from Experience Cloud site users.

1. From Setup, enter *Knowledge Article Types* in the `Quick Find` box, then select **Knowledge Article Types**.

2. Click the article type.

3. Scroll down to the Page Layouts related list or click the Page Layouts link at the top of the page.

4. To create a page layout, click **New** and follow the prompts. To edit an existing layout, click **Edit** and make your changes.

   Make your changes. The layout editor consists of two parts: a palette on the upper portion of the screen and the layout on the lower portion of the screen. The palette contains the available fields and a section element. The layout contains an Information section and space for you to add sections. By default, all custom fields are included in the Information section.

   > ⛔ **Important:** If you navigate away from your article-type layout before clicking save, your changes are lost.

   > 📝 **Note:** The `Article Number`, `Summary`, `Title`, and `URL Name` standard fields do not display in the layout. `Article Number` and `Summary` appear in a read-only Properties section at the top of the published article. Also included in this header are the `First Published`, `Last Modified`, and `Last Published` fields.

Task	Description
Add a section	Drag and drop the section element into the palette.
Change the name of a section	Click its title. You cannot rename the Information section.
Remove a field from a section	Drag it to the right side of the palette or click the ⊖ icon next to the field.
Remove a section from the article-type layout	Click the ⊖ icon next to the section name.
Save your changes and continue editing the article type layout	Click **Quick Save**.

> 💡 Tip:
> - Use the undo and redo buttons to step backwards and forwards, respectively.
> - Use the following keyboard shortcuts:
>   - Undo = CTRL+Z
>   - Redo = CTRL+Y

- Quick Save = CTRL+S

- To select multiple elements individually, use CTRL+click. To select multiple elements as a group, use SHIFT+click.

- To quickly locate any item in the palette, use the Quick Find box. The Quick Find box is especially useful for article-type layouts that have large numbers of items available in the palette.

5. To assign various layouts to the article type based on a user profile, click **Page Layout Assignments**.

6. Click **Edit Assignment**.

7. Select the profile, or profiles (using SHIFT), you want to change and select the layout from the **Page Layout To Use** dropdown.

When creating multiple article type page layouts, consider the following limitations and functionality changes.

- When creating page layouts, some fields are hidden based on the agent's license. Out of Date, Translation Completed Date, and Translation Exported Date are hidden from users who do not have a Knowledge User license or who are customer portal or partner portal users. In addition, Archived By and Is Latest Version are hidden from customer portal and partner portal users.

- Before Spring '16, preview pages showed the Summary field in the API that contained text values, even if they were not in the page layout. To continue displaying summary fields on preview pages, manually update your page layouts to include them.

- If you want to attach articles as PDFs to emails when solving cases, add **File Attachments** to the `Selected Email Tools` in the Feed View for the article type layout.

- The article edit page only shows the standard fields (Article Number, Title, URL Name, and Summary) and all the custom fields added to the layout, including the side bar fields. Other standard fields added on the page layout are ignored because they are not editable, and the custom fields are displayed in the order specified in the page layout.

- If an article type page layout doesn't include a field with a validation rule, you can't create or edit an article of that article type. Make sure all page layouts assigned to the article type by profile include all fields with validation rules.

- The Communication channel layout doesn't use the page layout to determine which Article fields are inserted into a case email. The fields that are inserted include the fields selected in the Communication Channel mapping.

- You can set up a specific profile to generate a PDF file. When sending articles as PDFs, the pdf is generated based on the sender's profile. Therefore, the receiver might get fields they are not meant to see. Use the `Use a profile to create customer-ready article PDFs on cases` setting on the Knowledge settings page so the fields in PDFs come from the page layout assigned to the configured profile. Also, Field Level Security of both the sender profile and the configured profile are applied.

Set Up Actions to Insert Articles to Case Publishers in Salesforce Classic
When using Knowledge in Salesforce Classic, agents can send an article's content embedded in the body of the email, a social post, or the Experience Cloud site publisher. Create a communication channel mapping to choose which article fields are included for each article 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.

Set Up Actions to Share Article URLs in Channels and Case Publishers
Agents can insert links to articles from a Salesforce Site or Experience Cloud sites into the case feed. In Lightning Experience, your agents can share article URLs in email, social posts, and chat and messaging conversations. In Salesforce Classic, your team can send article URLs in the email, social, and Experience Cloud publishers.

Set Up Actions to Insert Articles to Case Publishers in Salesforce Classic

When using Knowledge in Salesforce Classic, agents can send an article's content embedded in the body of the email, a social post, or the Experience Cloud site publisher. Create a communication channel mapping to choose which article fields are included for each article 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.

Email-to-case must be enabled. The case page layout has the SendEmail action. An HTML Body or Text field must be in the SendEmail layout.

1. From the object management settings for cases, go to Page Layouts.

2. How you access the Case Feed Settings page depends on what kind of page layout you're working with.

   - For a layout in the Case Page Layouts section, click **Edit**, and then click **Feed View** in the page layout editor.

   - For a layout in the Page Layouts for Case Feed Users section, click [▾] and choose `Edit feed view`. (This section appears only for organizations created before Spring '14.)

   If you've already opted to use the advanced page layout editor to configure the publisher for a layout, choose `Edit detail view` to add, change, or remove actions.

3. Under Articles Tool Settings, select **Enable attaching articles inline**.

4. (Optional) Under Administrative Permissions, select **Share internal Knowledge articles, externally**.

5. Click **Save**.

6. From Setup, enter `Knowledge Article Types` in the Quick Find box, then select **Knowledge Article Types**.

7. Click the label or name of the article type you want to share via email.

8. Under Communication Channel Mappings, click **New** or **Edit**.

9. Enter a label and name.

10. Add **Email** to the Selected Channels list.

11. Add the fields to include in the body of an email.

   📝 Note: You can't include smart links in the email, and the following fields are not supported:

   - ArticleType
   - isDeleted
   - Language
   - MultiPicklist
   - Picklist
   - Publication Status
   - Source
   - Validation Status

12. Click **Save**.

👁 Example: While solving customer cases, agents with the permission can insert article content into the body of an email. Anywhere agents can attach articles to cases, such as the Knowledge One sidebar in the Salesforce Console, the Articles list in the case feed, the Article widget, or the suggested articles in a Knowledge One search, they can email any article of that type within the body of an email by selecting **Email article with HTML** in the action dropdown. The article content is inserted at top of email thread or wherever the agent left their cursor. When an article has been emailed, an envelope icon appears to the left of the title. When the article has files that exceed the 10-mb attachment limit, agents are asked to select which files to attach and retry sending the email.

> 📝 Note: If rich text is not enabled on your case feed layout for the article type, only article text is embedded into the email and the action changes to **Email article text only**.

Set Up Actions to Share Article URLs in Channels and Case Publishers

Agents can insert links to articles from a Salesforce Site or Experience Cloud sites into the case feed. In Lightning Experience, your agents can share article URLs in email, social posts, and chat and messaging conversations. In Salesforce Classic, your team can send article URLs in the email, social, and Experience Cloud publishers.

To share article URLs from Salesforce Sites or Experience Cloud sites in the case feed, you must have the Knowledge component in your Lightning page or, in Salesforce Classic, in the Service Console. You must also have either a Salesforce Site or Experience Cloud set up.

Your org must have the relevant channel configured, such as email, Social Customer Service, or Chat.

1. From Setup, enter `Knowledge` in the quick find box, then select **Knowledge Settings**.

2. Click **Edit**.

3. Under Share Article via URL Settings, select **Allow users to share articles via public URLs**.

4. In the Available Sites list, select which Salesforce Sites and Experience Cloud sites you want agents to see when they share article URLs. Add them to the Selected Sites list.

5. Click **Save**.

Your agents can now use these actions in the Knowledge component and in Lightning Experience list views to send links in the case feed.

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 administer Salesforce Knowledge:
- Customize Application

  AND

  Manage Salesforce Knowledge

To share article links in the case feed:
- Edit on Case

  AND

  Read on Knowledge

Control Data Integrity with Validation Rules

Ensure that your article content is compliant with your company standards. Create validation rules for each article type to check whether required fields have the appropriate values based on the article's status.

1. From Setup, enter *Article Types* in the Quick Find box, then select **Knowledge Article Types**.

2. Click the article type.

3. Scroll down to the Validation Rules related list or click the **Validation Rules** link at the top of the page.

4. To create a validation rule, click **New**. To edit an existing rule, click **Edit**.

5. Name the rule.

6. Make the rule active.

7. Optionally, describe what you want to control on articles of this type.

8. Specify an error condition formula and a corresponding error message.

   The error condition is written as a Boolean formula expression that returns true or false. When true, the article is not saved, and an error message displays. The author can correct the error and try again. Knowledge article errors always display at the top of the page, not next to the field. Write your errors descriptively so that authors know how to satisfy the validation rule. For example, identify which field is causing the error.

9. Click **Save**.

When creating validation rules on article types, consider the following limitations and functionality changes.

- If an article type page layout doesn't include a field with a validation rule, you can't create or edit an article of that article type. Make sure all page layouts assigned to the article type by profile include all fields with validation rules.

- The Article Currency field and the VLOOKUP function don't support validation rules.

- When importing articles, if the import data file has a valid article with an invalid translation, the translation is created, but its translated content isn't imported.

- Only the first validation rule error displays at the top of the page and in the import article log. If multiple errors exist but are not fixed, they are displayed on subsequent saves or imports.

- In the API, KA fields, such as Case Association Count and Archived Date, don't support validation rules. Only KAV (article version) fields are supported in validation rules.

Article History Tracking (Salesforce Classic)

You can track the history of certain fields in articles. If you have history tracking enabled, open an article of that type and click **Version** to see a version history list. You can also set tracking for the article type and track the full history of an article and its versions. Article events are tracked for up to 18 months.

The system records and displays field updates, publishing workflow events, and language versions for the primary article and any translations. When you track old and new values, the system records both values as well as the date, time, nature of the change, and the user who made the change. When you track only the changed values, the system marks the changed field as edited. It doesn't record the old and new field values. This information is available in the Version History list and the fields are available in the Article Version History report.

Article history respects field, entity, and record-level security. You must have at least Read permission on the article type or the field to access its history. For data category security, Salesforce determines access based on the categorization of the online version of an article. If there is no online version, then security is applied based on the archived version, followed by the security of the draft version.

1. From Setup, enter `Knowledge` in the Quick Find box.

2. Select **Knowledge Article Types** (if Lightning Knowledge is not enabled) or **Knowledge Object Setup** (if Lightning Knowledge is enabled).

3. Create an article type or edit one from the Article Types list.

4. Click **Set History Tracking**.

5. Choose the fields you want to track.
   Salesforce begins tracking history from that date and time. Changes made before that date and time aren't tracked.

6. Save your changes.

Article Type Templates

Article types in Salesforce Knowledge require a template for each channel. The standard article-type templates—Tab and Table of Contents—specify how the sections in the article-type layout appear in the published article. For example, if you choose the Tab template, the sections defined in the layout appear as tabs when users view an article. With the Table of Contents template, sections appear on a single page with hyperlinks to each section. You can also create a custom template using Visualforce. Custom templates aren't associated with the article-type layout.

📝 **Note:** To ensure access to Visualforce pages, always set the Visualforce permissions and visibility for article templates.

1. From Setup, enter `Knowledge Article Types` in the `Quick Find` box, then select **Knowledge Article Types**

2. Click an article type name.

   - For a default template, continue with Step 12.

   - To create a custom template, make note of the article type's `API Name`. You need this value when you create the Visualforce page.

3. From Setup, enter `Visualforce Pages` in the `Quick Find` box, then select **Visualforce Pages**.

4. Click **New**.

5. In the `Name` text box, enter the text that appears in the URL as the page name.

   This name can contain only underscores and alphanumeric characters, and must be unique in your org. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.

6. In the `Label` text box, enter the text that users see when choosing this template from the Channel Displays related list on the article type detail page.

7. Add your Visualforce markup.

   The only requirement for custom article-type templates is that the standard controller is equal to the `API Name` of the article type. For example, if the `API Name` of the article type is `Offer__kav`, your markup is:

```
<apex:page standardController="Offer__kav">

              ... page content here ...

              </apex:page>
```

   📝 **Note:** Click **Component Reference** for a list of the Visualforce components, such as `knowledge:articleRendererToolbar` and `knowledge:articleCaseToolbar`, available for use in custom article-type templates.

8. If your article type has a File field, you can allow users to download the field's content.

   In this example, the article type is `Offer`, the name of the File field is `my_file`, and the text that appears as a link is `Click me`:

```
<apex:outputLink value="{!URLFOR($Action.Offer__kav.FileFieldDownload,
                          Offer__kav.id,
```

```
['field'=$ObjectType.Offer__kav.fields.my_file__Body__s.name])}">Click
                         me</apex:outputLink>
```

> 📝 **Note:** If the File field is empty (meaning the author didn't upload a file), the link still appears on the published article but has no function. If you do not want the link to appear when the File field is empty, replace `Click me` in the example with the name of the file. For example, `{!Offer__kav.my_file__Name__s}`.

9. Click **Save**.

    Your custom template can now be assigned to any channel on the article type.

10. From Setup, enter `Knowledge Article Types` in the `Quick Find` box, then select **Knowledge Article Types**

11. Click an article type name.

12. For each channel, specify the template.

    - For Internal App, Customer and Partner, **Tab** is the default template.
    - For Public Knowledge Base, **Table of Contents** is the default template.
    - If you created a custom template for this article type, it also appears in the dropdown menu.

13. Save your work.

> 👁 **Example:** If you choose the Tab template, the sections you defined in the layout appear as tabs when users view an article.

Published Article Using the Tab Article-Type Template
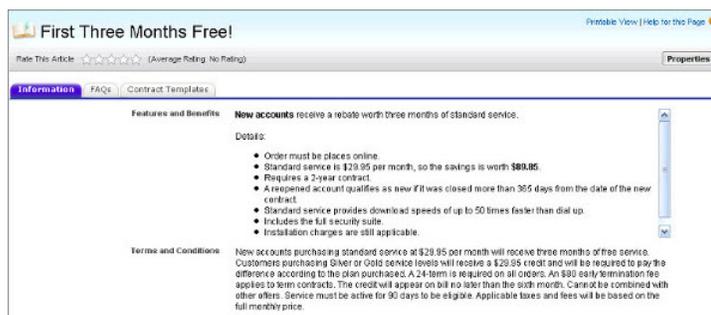
If you choose the Table of Contents template, the sections you defined in the layout appear on one page with hyperlinks to each section title.

Published Article Using the Table of Contents Article-Type Template
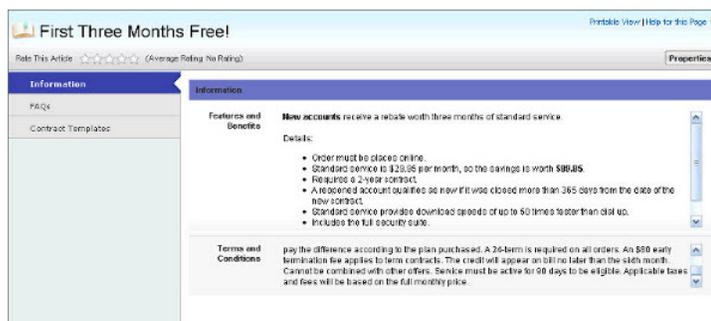
Delete an Article Type

Deleting article types can result in errors and lost data. Read this entire topic carefully before deleting article types.

1. From Setup, enter `Knowledge Article Types` in the `Quick Find` box, then select **Knowledge Article Types**.

2. Next to the article type, click **Del**.

3. Confirm that you want to delete the article type.

Notes on Deleting Article Types

- If your organization has only article type, you cannot delete it. Every Salesforce Knowledge org requires at least one deployed article type. Create an article type and then delete the old one.

- Any articles associated with a deleted article type are automatically removed from all channels, including draft, published, and archived articles.

- Salesforce does not display deleted article types in the Recycle Bin with other deleted records. Instead, deleted article types appear in the Deleted Article Types list on the article list view page for 15 days. During this time, you can restore the article type and its articles, or permanently erase the article type and its articles. After 15 days, the article type and its articles are permanently erased.

- If a reader clicks a bookmark to a deleted article's URL, an Insufficient Privileges message displays.

Classic Knowledge User Access

Specify which agents in your company are Classic Knowledge users and give them access to article actions. Create user profiles with the user permissions they need, and then assign them to these profiles.

> 💡 **Tip:** Not sure if you heard… Knowledge is available in Lightning Experience! To save yourself time and enjoy the full power of the Salesforce platform, we recommend getting started with Lightning Knowledge. Going forward, new features are available exclusively in Lightning Knowledge.

By default all internal users can read articles. However some licenses like the Knowledge Only User licenses, require the "AllowViewKnowledge" permission on the user's profile. To give a user the "AllowViewKnowledge" permission on their profile, 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.
>
> - From Setup, enter `Users` in the `Quick Find` box, then select **Users**.
> - Click **Edit** next to the user's name or click **New** to create a user.
> - If you are creating a user, complete all the required fields.
> - Select the `Knowledge User` checkbox.
> - Click **Save**.
>
> See

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

Refer to this table for details on permissions associated with Classic Knowledge tasks. Refer to Lightning Knowledge User Access on permissions associated with Lightning Knowledge.

Salesforce Knowledge Task	User Permissions Needed
To create article types:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.)
To manage article actions:	"Manage Salesforce Knowledge" This permission is on by default in the System Administrator profile.
To create articles from cases using the simple editor:	"Read" and "Create" on the article type
To create articles from cases using the standard editor:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read" and "Create" on the article type

Salesforce Knowledge Task	User Permissions Needed
To search articles from cases and attach articles to cases:	"Read" on the article type
To create articles from answers:	"Read" and "Create" on the article type
To search for and read articles from the Article or Knowledge tab:	"Read" on the article type
To create or edit articles from the Article Management tab:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Create", and "Edit" on the article type
To edit draft articles from the Article Management tab:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read" and "Edit" on the article type
To delete articles from the Article Management tab:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Edit", and "Delete" on the article type AND A delete article action, set on the Article Actions Setup page.
To publish articles from the Article Management tab:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Create", "Edit", and "Delete" on the article type AND A publish article action, set on Article Actions Setup page
To assign articles for the Article Management tab:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read" and "Edit" on the article type
To edit published or archived articles:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Create", and "Edit" on the article type AND

Salesforce Knowledge Task	User Permissions Needed
	A publish or archive article action, set on the Article Actions Setup page
To archive articles from the Article Management tab:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Create", "Edit", and "Delete" on the article type AND An archive article action, set on the Article Actions Setup page
To submit articles for translation:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Create", and "Edit" on the article type AND A translate article action, set on the Article Actions Setup page
To delete translated articles:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Edit", and "Delete" on the article type AND A delete article action, set on the Article Actions Setup page
To publish translated articles:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Create", "Edit", and "Delete" on the article type AND A publish article action, set on the Article Actions Setup page
To edit translated articles:	"Manage Articles" (This permission is on by default in the System Administrator profile.) AND "Read", "Create", and "Edit" on the article type AND A translate article action, set on the Article Actions Setup page
To import articles:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.) AND

Salesforce Knowledge Task	User Permissions Needed
	"Manage Articles"
	AND
	"Manage Knowledge Article Import/Export"
	AND
	"Read", "Create", "Edit", and "Delete" on the article type
To import and export translated articles:	"Manage Salesforce Knowledge" (This permission is on by default in the System Administrator profile.)
	AND
	"Manage Articles" (This permission is on by default in the System Administrator profile.)
	AND
	"Manage Knowledge Article Import/Export" (This permission is on by default in the System Administrator profile.)
	AND
	"Read", "Create", "Edit", and "Delete" on the article type
To create data categories	"Manage Data Categories" permission. This permission is on by default in the System Administrator profile.

To enable agents to perform their specific tasks, create public groups for each role and assign only the necessary article actions to those groups.

Example: Your Salesforce Knowledge agents are a mixture of different levels of job experience and expertise in the products and services your company offers. These examples outline four basic types of users and some of the permissions they need to perform their jobs.

Scott: The Reader

Scott Jackson is relatively new to the company, so he's a basic agent of the knowledge base. Currently, he has read-only access to articles, so he can search and view articles. Readers don't author or publish, so he won't belong to a public group or need to submit articles for approval. He needs the following permissions to perform his job.

Scott	Permission	Article Type-Specific Permissions			
Salesforce Knowledge Functionality	Manage Articles	Read	Create	Edit	Delete
Search articles from and attach articles to cases		✅			
Search for and read articles from the Articles tab		✅			

Amber: The Candidate

Amber Delaney is a candidate-level agent and can create and publish articles with statuses of either `Work in Progress` or `Not Validated`. If Amber works on an article with a different validation status, she must send it to a queue for approval before it's published.

Amber is part of the KCS Candidate public group and submits the articles she can't publish to the Publishing External queue. She needs the following permissions to perform her job duties.

Amber	Permission	Article Type-Specific Permissions			
Salesforce Knowledge Functionality	Manage Articles	Read	Create	Edit	Delete
Search articles from and attach articles to cases		✅			
Search for and read articles from the Articles tab		✅			
Create or edit article from the Article Management tab	✅	✅	✅	✅	
Edit draft articles from the Article Management tab	✅	✅		✅	
Edit published or archived articles	✅	✅	✅	✅	

Anne: The Contributor

As a contributor, Anne Murphy is a more advanced Knowledge user. She understands the standards for articles in the organization and can create articles and publish articles with `Validated Internal` status. She can also work on articles authored by other users if they have either `Work in Progress` or `Not Validated` statuses, and can change them to `Validated Internal`. Since she doesn't have permission to publish articles to an external audience, she must submit those customer-facing articles to the Publishing External queue.

> 📝 Note: In Salesforce Classic, if you don't have the "Manage Articles" permission, you don't see draft articles. However, you can still approve draft articles by going to the Knowledge approval page.

Anne is a member of the Contributor public group and she needs the following permissions to perform her job duties.

	Permission	Article Type-Specific Permissions			
Salesforce Knowledge Functionality	Manage Articles	Read	Create	Edit	Delete
Create articles from cases using the simple editor		✅	✅		
Create articles from cases using the standard editor	✅	✅	✅		
Search articles from and attach articles to cases		✅			
Create articles from answers		✅	✅		

Salesforce Knowledge Functionality	Permission Manage Articles	Article Type-Specific Permissions			
		Read	Create	Edit	Delete
Search for and read articles from the Articles tab		✓			
	✓	✓	✓	✓	
	✓	✓		✓	
Delete articles (version or entire) from Article Management tab	✓	✓		✓	✓
Assign articles from Article Management tab	✓	✓		✓	
	✓	✓	✓	✓	
Archive articles from the Article Management tab	✓	✓	✓	✓	✓

Pat: The Publisher

Pat Brown is Knowledge domain expert and is responsible for reviewing and publishing articles to an external audience. He is a member of the Publisher public group. Pat also belongs to the Publishing External queue. He needs the following permissions to perform his job duties.

Salesforce Knowledge Functionality	Permission Manage Articles	Article Type-Specific Permissions			
		Read	Create	Edit	Delete
Create articles from cases using the simple editor		✓	✓		
Create articles from cases using the standard editor	✓	✓	✓		
Search articles from and attach articles to cases		✓			
Create articles from answers		✓	✓		
Search for and read articles from the Articles tab		✓			
Create or edit article from the Article Management tab	✓	✓	✓	✓	
Edit draft articles from the Article Management tab	✓	✓		✓	
Delete articles (version or entire) from Article Management tab	✓	✓		✓	✓

Salesforce Knowledge Functionality	Permission	Article Type-Specific Permissions			
	Manage Articles	Read	Create	Edit	Delete
Publish article from Article Management tab	☑	☑	☑	☑	☑
Assign articles from Article Management tab	☑	☑		☑	
Edit published or archived articles	☑	☑	☑	☑	
Archive articles from the Article Management tab	☑	☑	☑	☑	☑

How they all work together

Each user profile defines an agent's permission to perform different job duties and functions. To enable agents to perform these functions, you create public groups for each role and assign only the necessary article actions to that group. The criteria you create in the approval process defines which validation status can be automatically approved and published and which article must be approved and published by a domain expert.

For example, Anne, the Contributor, can create a `Validated External` article, but based on the article actions assigned to her public group, the approval process sends her article to Pat, the Publisher, to be published. Pat, as a Publisher, can publish his own articles without submitting them to a queue.

The following table lists the job functions that each role needs to perform on articles in the organization

Job Function	Reader	Candidate	Contributor	Publisher
Create and publish `Work in Progress`	No	Automatically approved and published	Automatically approved and published	Yes
Create and publish `Not Validated`	No	Automatically approved and published	Automatically approved and published	Yes
Create and publish `Validated Internal`	No	Needs approval	Automatically approved and published	Yes
Create and publish `Validated External`	No	Needs approval	Needs approval	Yes
Update and publish `Work in Progress`	No	No	Automatically approved and published	Yes
Update and publish `Not Validated`	No	No	Automatically approved and published	Yes

Job Function	Reader	Candidate	Contributor	Publisher
Update and publish `Validated Internal`	No	No	Automatically approved and published	Yes
Update and publish `Validated External`	No	No	Needs approval	Yes

Create Public Groups for Knowledge

Salesforce Knowledge uses public groups as a way to assign users to specific tasks related to articles. When you assign article actions to a public group, you can grant users in that group the ability to do things like publish articles with a specified validation status. Public groups are also used in approval processes to manage the publishing workflow.

Assign Article Actions to Public Groups

Article actions let agents participate in the article publishing process. By default, all article actions are assigned to users with the "Manage Articles" user permission. Agents can complete an action as long as they have the correct article type permission. You can control article action access by assigning public groups to article actions and adding agents the relevant public groups. To further restrict actions like publishing, you can create approval processes that allow agents to publish only those articles that have specific validation statuses. For example, many contributors can write many articles but you can create an approval process so no articles are published until they are reviewed and validated by a qualified author.

Create Public Groups for Knowledge

Salesforce Knowledge uses public groups as a way to assign users to specific tasks related to articles. When you assign article actions to a public group, you can grant users in that group the ability to do things like publish articles with a specified validation status. Public groups are also used in approval processes to manage the publishing workflow.

For example, when a member of the Candidate public group submits an article with the status `Work in Progress` for approval, it is automatically approved and published. If the same agent submits an article with `Validated Internal` status, it moves to the Publishing External queue to be reviewed before being published.

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

2. Click **New**, or click **Edit** next to the group you want to edit.

3. Enter the following information:

Field	Description
`Label`	The name used to refer to the group in any user interface pages.
`Group Name` (public groups only)	The unique name used by the API and managed packages.
`Grant Access Using Hierarchies` (public groups only)	To allow automatic access to records using your role hierarchies, select **Grant Access Using Hierarchies**. When selected, any records shared with users in this group are also shared with users higher in the hierarchy. Deselect **Grant Access Using Hierarchies** if you're creating a public group with All Internal Users as members, which optimizes performance for sharing records with groups. If **Grant Access Using Hierarchies** is deselected, users that are higher in the role hierarchy don't receive automatic access. However, some users can still access records they don't own. Examples of such users include users with the View All and Modify All object permissions and the View All Data and Modify All Data system permissions.
`Search`	From the Search dropdown, select the type of member to add. If you don't see the member you want to add, enter keywords in the search box and click **Find**. For account owners to see child records owned by high-volume Experience Cloud site users, they must be members of any share groups with access to the site users' data.
`Selected Members`	Select members from the Available Members box, and click **Add** to add them to the group.

`Selected Delegated Groups`	In this list, specify any delegated administration groups whose members can add or remove members from this public group. Select groups from the Available Delegated Groups box, and then click **Add**. This list appears only in public groups.

4. Click **Save**.

> Note: When you edit groups, sharing rules are automatically reevaluated to add or remove access as needed. If these changes affect too many records at once, a message appears warning that the sharing rules aren't automatically reevaluated, and you must manually recalculate them.

Now assign only the necessary actions to your groups so the selected members can perform their tasks while keeping the integrity of your knowledge base.

Assign Article Actions to Public Groups

Article actions let agents participate in the article publishing process. By default, all article actions are assigned to users with the "Manage Articles" user permission. Agents can complete an action as long as they have the correct article type permission. You can control article action access by assigning public groups to article actions and adding agents the relevant public groups. To further restrict actions like publishing, you can create approval processes that allow agents to publish only those articles that have specific validation statuses. For example, many contributors can write many articles but you can create an approval process so no articles are published until they are reviewed and validated by a qualified author.

> Note: Although you can add any user to a public group, only agents with the "Manage Articles" user permission and the appropriate object permissions can perform article actions.

This table summarizes the article type permissions that are required for each article action.

Article Action	Create	Read	Edit	Delete
Publish Articles	✅	✅	✅	✅
Archive Articles	✅	✅	✅	✅
Delete Articles		✅	✅	✅
Edit Published and Archived Articles		✅	✅	
Submit Articles for Translation	✅	✅	✅	
Publish Translation	✅	✅	✅	✅
Edit Translation	✅	✅	✅	

1. From Setup, enter `Knowledge Article Actions` in the `Quick Find` box, then select **Knowledge Article Actions**.

2. Click **Edit**.

3. For the action you want to assign, select the appropriate radio button and choose a public group.

   If you don't modify an article action, all agents with the "Manage Articles" permission can perform that action.

4. Click **OK** and then click **Save**.

📝 **Note:** Article action assignments are ignored when updating an article through SOQL.

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**.

Workflow and Approvals for Articles

Creating processes where Knowledge experts review, validate, and approve articles for publication is critical to creating a trustworthy knowledge base. Implementing approval processes with Salesforce Knowledge gives you more control over the content and publication of your articles.

Creating workflow rules and approval processes lets your organization automate many of the tasks involved with managing its knowledge base. When implementing Salesforce Knowledge, you can create workflow rules and approval processes for some or all the article types used by your organization.

Workflow rules let you create email alerts, update fields, or send outbound API messages when an article meets certain criteria. For example, you could create a workflow rule that sends an email alert to the article owner when a new article is created from a case. Article type workflow doesn't support tasks.

Approval processes automate the approval of articles. When implemented with Salesforce Knowledge, approval processes give you more control over the content of your articles and the process used to approve them. For example, you can create a process that requires legal and management teams to approve articles containing sensitive information.

Tasks aren't available for article type workflow rules.

1. From Setup, enter `Workflow Rules` in the `Quick Find` box, then select **Workflow Rules** to access the workflow rules list page.

2. On the workflow rules list page, click **New Rule**.

3. Select the article type from the `Select object` dropdown list.

4. Click **Next**.

5. Enter a rule name. Optionally, enter a description for the rule.

6. Select the evaluation criteria, and choose how criteria are met.

7. Enter criteria for the rule.

8. Click **Save & Next**.

9. Click **Add Workflow Action**, select the type of action for the rule, and enter the information required by the action.

10. Click **Save**.

11. Optionally, add a time-dependent workflow action by clicking **Add Time Trigger**. Provide time trigger information, and then click **Save**.

12. Click **Done**.

13. From Setup, enter `Approval Processes` in the `Quick Find` box, then select **Approval Processes**.

14. Choose the Approval Process Wizard. Two wizards are available to help you through the approval setup process. Choose the one that meets your requirement the best.

15. Provide a name, unique name, and description for the process.

16. Specify criteria for entering the process.

    For example, you can specify that an article published on a public site requires approval: `Visible on public site equals True`.

17. Specify approvers for the process.

Option	Description
Let the submitter choose the approver manually. **(default)**	Prompts the user to select the next approver.
Automatically assign an approver using a standard or custom hierarchy field.	Assigns the approval request to the user in the field displayed next to this option. You select this field when you configure the approval process.
Automatically assign to a queue.	Available only for objects that support queues. Assigns approval requests to a queue.
Automatically assign to approver(s).	Assigns the approval request to one or more specific users, specific queues, or users related to the submitted record. You can add up to 25 per step.

18. Select the email template that the process uses to notify approvers.

When an approval process assigns an approval request to a user, Salesforce automatically sends the user an approval request email. The email contains a link to the approval page in Salesforce, where the agent can approve or reject the request and add comments.

19. Configure the approval request page layout.

The approver approves or rejects the article from this page. You can add as many fields to this page as you think your agents require to reasonably assess an article's content. For example, you could choose to include a summary of the article's content, the product discussed, and the author's name.

20. Specify which users are allowed to submit articles for approval.

For example, for articles that require editing before approval, you could create a public group containing editors, and then specify that only members of that group can submit articles for approval.

21. Activate the approval process.

Keep the following in mind when creating approval processes for article types.

- You need to be a Knowledge user in order to publish an article as part of the approval process.

- Adding an approval process to an article type lets your organization ensure that the required reviewers approve the article before it's published, as long as it's not already scheduled. Articles scheduled for publication before being sent for approval are published regardless of the approval status. When an approval process is enabled for an article's article type, the Approval History related list displays on the article details page.

- When creating an approval process, change the final approval action to "Unlock the record for editing" to allow agents to publish the article.

- Articles aren't published automatically at the end of an approval process. Agents must click **Publish...** to make the article available in the publishing channels.

- When an approval process is associated with an article type, agents with the "Manage Articles" permission could see both the **Publish...** and the **Submit for Approval** buttons on an article's detail page. (Permissions and article actions determine which buttons they see.) These agents can publish an article without submitting it for approval. To prevent this scenario from affecting many users, assign the "Publish Articles" article action to a limited group of users instead of giving it to all users with the "Manage Articles" permission. Ensure that the users with direct publishing capability know which articles need approval before publication.

- In Salesforce Classic, if you don't have the "Manage Articles" permission, you don't see draft articles. However, you can still approve draft articles by going to the Knowledge approval page.

- Workflow rules and approval processes apply to the "Draft to Publication" portion of the article publishing cycle. Workflow rules aren't available for archiving. Approval processes aren't available for translation or archiving.

> **Note:** When an article is published from the edit page, the article is first saved and then published. Workflow rules apply to the saved draft article but not the published article.

- A user who only has read access to an article type can publish a draft article of that type if there is an approval process associated to the article type and the approval process is complete but the article has not been published.

Create Workflow Actions for Knowledge

Knowledge actions are templates that link a workflow action to an article type. When knowledge actions are enabled, you can use them to link article types to specific workflow article actions, such as publishing. For example, if you want each FAQ to publish as a new version when it completes the approval process, you can create a knowledge action that links an FAQ article to the **Publish as New** action. Then, when you create an approval process for FAQs, select the new Knowledge action.

> **Important:** When you create the approval process, make sure to change the final approval action to `Unlock the record for editing` to let users publish the article.

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

2. Click **New Knowledge Action**.

3. Select the article type for the action. The workflow rules and approval process that you associate with the action must belong to the same article type.

4. Enter a unique name for the knowledge action.

5. Select the type of action you want to apply to the article type. For example, Publish as New publishes the article as a new version.

6. Enter a description.

7. Click **Save**.
   The Knowledge Action detail page appears showing you the rules and approval processes that use the knowledge action.

8. When you're ready to use the knowledge action in an approval or workflow process, click **Activate** on the Knowledge Action detail page.

Modify Default Category Group Assignments for Articles

Salesforce Knowledge uses data categories to classify articles. Data categories are organized in category group. After creating category groups, admins decide which groups to use for Salesforce Knowledge articles. For example, if your org uses both the Answers and Salesforce Knowledge, you might want one category group to be used by the answers site and two other category groups for articles. Answers and articles can use the same category group. Authors can assign up to eight data categories from one category group to an article so that users searching for articles can find and filter by category. By default, all the category groups you create are assigned to Salesforce Knowledge

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

   A list of all category groups appears.

2. Click **Edit** and move any category groups that you don't want available for articles from the Selected Category Groups list to the Available Category Groups list.

   Later, you can choose to make a hidden category group visible.

   > 📝 Note: The order of category groups is not preserved from the edit page to the data category assignment page.

3. Click **Save**.

   You receive an email after the save process completes. Authors can now assign categories in the selected groups to articles on the Article Management tab. Authors can only access categories if the category group is active and the author's data category visibility settings provide access to the category.

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 101.

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**.

Set Up the Knowledge One Widget

Knowledge One is available as a widget that you can plug in to the Salesforce Console for Service or Salesforce Console for Sales. If you are using the Knowledge tab, you get the same easy-to-use interface for articles and external sources on cases and within the Salesforce Console for Service. You can search, send, and create articles, all without leaving the case.

Of all the Salesforce Knowledge article widgets, the Knowledge One widget lets you:

- Attach a published Salesforce Knowledge article to the case in 1 click. In Salesforce Classic, you can attach a document from an external data source to a case if Chatter is enabled.
- Share an article as a URL, if it is shared on a public channel.
- Email an article as a PDF, if it is shared on a public channel.
- Create and manage articles.
- Make adjustments based on your window width. In the console, in windows smaller than 600 pixels, the searchable objects are displayed in a drop-down menu.

The article widget in a case feed search doesn't necessarily use the agent's language. If the agent's language isn't a Salesforce Knowledge supported language but their locale language is, the locale language is the search language. If neither the agent's language nor local language are supported, the search language is the default Salesforce Knowledge language, which you can find and set on the Knowledge Settings page.

1. From the object management settings for cases, go to Page Layouts and open your case page layout for edit.

2. To ensure the Email quick action is in the case page layout, select **Quick Actions** in the left-hand menu. Next, drag **Email** to the `Quick Actions in the Salesforce Classic Publisher` line. Without the Email quick action, you can't send articles via email.

3. Disable previous article sidebar components.

   - To disable the Knowledge sidebar, click **Layout Properties** and ensure `Knowledge Sidebar` is unchecked.
   - To disable the case feed article tool, click **Feed View** and ensure `Use Case Feed Article Tool in the Console` is unchecked.

4. In the page layout editor, click **Custom Console Components**.

5. In the sidebar where you want the Knowledge One widget, select `Knowledge One` in the Type drop down and set the sidebar parameters.

   Email quick action to be added to the Case page layout in order to show up

If you can't see the Knowledge One sidebar, increase its width to 250 (height to 150) in the page layout. These are the minimum measurements for the Knowledge One sidebar to display properly.

Compare Article Widgets for Cases at a Glance
Decide which Salesforce Knowledge article widget is best for your organization.

Compare Article Widgets for Cases at a Glance

Decide which Salesforce Knowledge article widget is best for your organization.

Does the widget...	Article Widget	Article Case Feed Widget	Knowledge One Widget
Filter on data category	Yes	No	Yes
Create an article	No	No	Yes
Search an external object	No	No	Yes
Access your draft articles	No	No	Yes
Attach an article to a case	Yes	Yes	Yes
Send an article as a PDF	No	Yes	Yes
Share an article's public URL	No	Yes	Yes
Adjust with the window size	No	No	Yes
Have more than one way to suggest articles	No	No	Yes

Article Widget

Article Case Feed Widget

Knowledge One Widget

IMPROVE THE KNOWLEDGE ARTICLE SEARCH EXPERIENCE

To improve the Salesforce knowledge article search experience, enable search highlights, snippets, synonyms, promoted terms, topics, and case keywords.

Search Highlights and Snippets in Knowledge Articles

Quickly identify the best article and see how articles match your search terms with relevant text and highlighted search terms in the search results.

Synonym Groups for Article Searches

Create synonym groups so words or phrases are treated equally in searches. When users search Salesforce Knowledge articles, they find matches for all terms in a synonym group.

Manage Promoted Search Terms in Knowledge Articles

From a single page, you can view, edit, and delete all the promoted search terms that are associated with Salesforce Knowledge articles.

Enable Topics for Articles

Classify and search knowledge articles by assigning topics. Topics can be added from the article view and detail pages. Suggested topics, which are only supported in English, are terms extracted from the article, so that they are more concrete and precise than a data category assignment. When searching, topics can be used to index the article, so the matched articles are more relevant to keyword searches.

Use More Case Keywords to Find Articles

When searching knowledge articles from a case, by default, only the case title is used in the search. Often, you want to use information from the case for more accurate search results, or create a custom search button.

Search Highlights and Snippets in Knowledge Articles

Quickly identify the best article and see how articles match your search terms with relevant text and highlighted search terms in the search results.

Search highlights and snippets give your agents and users context as to why the particular result matched their search query. The relevant text appears below the title with the search terms in bold. You can enable search highlights and snippets on the Salesforce Knowledge Settings page on page 10.

> **Note:** Search highlights and snippets are not generated for searches with wildcards.

Search highlights and snippets are generated from the following fields:

- Email
- Long text area
- Rich text area
- Text area

Search highlights and snippets aren't generated from the following fields:

- Checkbox
- Currency
- Date
- Date Time
- File
- Formula
- Lookup
- Multi-picklist
- Number
- Percent
- Phone
- Picklist
- URL

> **Note:** If a snippet is not generated, the article's summary field is shown instead.

Synonym Groups for Article Searches

Create synonym groups so words or phrases are treated equally in searches. When users search Salesforce Knowledge articles, they find matches for all terms in a synonym group.

A search for one term in a synonym group returns results for all terms in the group. For example, if you define a synonym group with these synonyms:

CRM, *customer relationship management*, *Salesforce*

then a search for `customer relationship management` matches articles that contain *customer relationship management* and articles that contain *CRM* or *Salesforce*.

To create a custom synonym group, from Setup, enter `Synonyms` in the Quick Find box, then select **Synonyms**. An org can create up to 10,000 synonym groups with up to six terms in each group.

Synonyms affect search behavior in these ways.

- Priority

  If a search term is part of a synonym group, the search results list items that contain the search term, followed by items that contain other terms in the synonym group.

  For example, if this synonym group is defined:

  fruit, *oranges*

  Then a search for `oranges` matches a list of items containing *oranges*, followed by items containing *fruit*.

  > 📝 Note: In the Article Management tab, if you sort the list by clicking a column header, the sort order, not priority, persists in the current and additional searches.

- Wildcards

  If a wildcard is used in a search, the wildcard expands the search term, but the search doesn't match any synonyms, even if the search phrase contains a defined synonym.

  For example, if these synonym groups are defined:

  fruit, *oranges*, *apples*

  cabbage, *lettuce*

  Then a search for `orang* lettuce` matches items that contain *orange* and *oranges*, but doesn't match items that contain *fruit*, *apples*, and *cabbage*.

- Operators

  If a search phrase contains an operator (`AND/OR/AND NOT`), synonym matches are returned only if the entire search phrase is a defined synonym.

  For example, if these synonym groups are defined:

  fruit, *oranges and apples*

  vegetables, *carrots*

  Then a search for `oranges and apples` returns matches for all items that contain the literal string *oranges and apples* and items that contain the term *fruit*.

  However, if the search phrase is `fruit and vegetables`, which is not a defined synonym, the search matches only those items that contain both the terms, *fruit* and *vegetables*.

In this case, AND functions as an operator and synonym matches are not returned in the search results. In terms of this example, items that contain a synonym of either *fruit* or *vegetables* (items that contain the term *carrots* or the phrase *oranges and apples*) are not returned.

- Exact phrase matches

  If a defined synonym is within an exact phrase search, using quotation marks, the search doesn't treat it as a synonym.

- Lemmatization

  Synonyms aren't lemmatized in search results; instead, they are matched as an exact phrase. However, the search term is lemmatized.

  For example, if this synonym group is defined:

  quench, drink orange juice

  Then a search for `quench` matches items that contain *quench*, *quenched*, *quenching*, and *drink orange juice*, but doesn't match items that contain *drinking orange juice*.

- Ignored words

  Words that are normally ignored in searches, such as *the*, *to*, and *for*, are matched if the word is part of a defined synonym.

  For example, if this synonym group is defined:

  peel the orange, cut the apple

  Then a search for `peel the orange` matches items that contain the exact string *peel the orange*.

- Overlapping synonyms

  If a search term consists of overlapping synonyms from different groups, the search matches synonyms in all the overlapping synonym groups.

  For example, if these synonym groups are defined:

  - *orange marmalade, citrus*
  - *marmalade recipe, sugar*

  Then a search for `orange marmalade recipe` matches items that contain *orange marmalade*, *citrus*, *marmalade recipe*, and *sugar*.

- Subsets

  If one synonym group includes a synonym that is a subset of a synonym in another group, a search for the subset term doesn't match items that contain synonyms from the subset synonym group.

  For example, if these synonym groups are defined:

  - *orange, apple*
  - *orange marmalade, citrus*
  - *marmalade, jam*

  Then a search for `orange marmalade` matches items that contain *orange marmalade* and *citrus*, but doesn't match items that contain *apple* or *jam*.

Manage Promoted Search Terms in Knowledge Articles

From a single page, you can view, edit, and delete all the promoted search terms that are associated with Salesforce Knowledge articles.

You can add promoted search terms to articles to influence the results when your customers and users search.

1. From Setup, enter `Promoted Search Terms` in the Quick Find box, then select **Promoted Search Terms**.

2. To view which terms are assigned to an article, sort by the Article Title column.

3. To edit a term, click **Edit** in its row.

4. To delete a term, click **Delete** in its row.
    The term is deleted only from the article associated with this row, not from other articles.

5. Save your changes.

Enable Topics for Articles

Classify and search knowledge articles by assigning topics. Topics can be added from the article view and detail pages. Suggested topics, which are only supported in English, are terms extracted from the article, so that they are more concrete and precise than a data category assignment. When searching, topics can be used to index the article, so the matched articles are more relevant to keyword searches.

📝 **Note:** Contrary to data categories, topics added to an article are not transferred to the same article in another language.

Topics for articles are enabled for each article type.

1. From Setup, enter `Topics for Objects` in the `Quick Find` box, then select **Topics for Objects**.

2. Click the article type name where you want to enable topics.

3. Check **Enable topics**.

4. Select which fields you want to use for suggestions.

5. Click **Save**.

6. Via profile or permission set, under System Permissions, define which agents can assign, create, delete, and edit topics.

Use More Case Keywords to Find Articles

When searching knowledge articles from a case, by default, only the case title is used in the search. Often, you want to use information from the case for more accurate search results, or create a custom search button.

Luckily, Salesforce Knowledge search pages accept other parameters:

- id=<case id>: The ID of the current case.
- search=<keywords>: The keywords to be searched.
- articleType_<article type dev name>=on: multiple parameters possible, article types to select (if no article type is selected, then all article types are selected)
- ct_<data category group internal name>=<data category internal name>: multiple parameters possible, filter pre-selection

To take advantage of those parameters, add a custom button to the case detail page containing a few lines of javascript that extract keywords from the case and hide the default article search button.

> 📝 **Note:** You can also create a custom article widget with `support:caseArticle`.

1. From the object management settings for cases, go to Buttons, Links, and Actions.
2. Click **New Button or Link**.
3. Enter a unique `Label`, `Name`, and `Description`.
4. Select **Detail Page Button** for `Display Type`.
5. Select **Execute JavaScript** in the `Behavior` dropdown.
6. Select **OnClick JavaScript** in the `Content Source` dropdown.
7. Enter code for extracting case data and setting up parameters for the article search page.
   For example:

```
// article search page URL
var url = '/knowledge/knowledgeHome.apexp';

// ID of the current case
url += '?id={!Case.Id}';

// use the case subject as the search keywords
url += '&search={!Case.Subject}';

// read case attributes
var caseType = '{!Case.Type}';
var caseProduct = '{!Case.Product__c}';

// if the case is of a certain type, select only 2 of the article types available
// in other cases, we keep the default behavior (all article types selected)

if (caseType=='Problem' || caseType=='Question') {
   url += '&articleType_FAQ_kav=on';
   url += '&articleType_How_To_kav=on';
}
```

```
// preselect a data category for search results based on the category

var product = '';
if (caseProduct=='Home')
    product = 'Home';
if (caseProduct=='SMB')
    product = 'Small_and_Medium_Business';
if (caseProduct=='Large enterprise')
    product = 'Large_Enterprise';

if (product.length>0)
    url += '&ct_Products2=' + product;

// once the logic is executed, we go to the article search page
window.location = url;
```

8. Click **Save**.

9. From the object management settings for cases, go to Page Layouts.

10. Click **Edit** next to `Case Layout`.

11. Drag your custom button for article search into the case layout.

12. Click **Save**.

13. Create a Visualforce page named *CaseDetailsWithoutStandardKBSearchButton* with the following code:

```
<apex:page standardController="Case">
    <style type="text/css">
        div.knowledgeBlock input {display: none}
    </style>
    <apex:detail/>
</apex:page>
```

14. Back in the Buttons, Links, and Actions area for cases, click **Edit** next to `View`.

15. Select **Visualforce Page** in `Override with`.

16. Select **CaseDetailsWithoutStandardKBSearchButton** from the dropdown.

17. Click **Save**.

IMPORT EXTERNAL CONTENT INTO SALESFORCE KNOWLEDGE

Import external articles or an information database into Salesforce Knowledge. To move content from Classic to Lightning Knowledge, use the 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 77.

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.

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.

🛑 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

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 primary (1) or translation (0). Required to import articles with translations, however, isMasterLanguage can't be in a .csv file to import articles without translations. A translation must follow its primary article so that it's associated with the primary 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.

Field or data	Description
Standard and custom fields	Refer to an article type's standard fields using field names and refer to custom fields using API names. If the related article type field is mandatory, leaving a row cell empty can cause your articles to be skipped.
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 `datacategorygroup.`. For example, use `datacategorygroup.Products` to specify the category group Products.
Channel	To specify where the imported articles are available, use the keyword `Channels`.
`Language`	Specify the articles' language. Required to import articles with translations. Optional to import articles without translations. If you don't include this column, the articles automatically belong to the default knowledge base language and you can't import translations along with the primary 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	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.
	The article importer does not support subfields. If you have fields within fields, adjust your structure and content before importing into Salesforce Knowledge.
Rich text area field	Always enter the .html file path relative to the location of the .csv file. Never enter raw text. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing HTML and images.

Consideration	Notes
	- We recommend that you create one folder for the .html files (for example, `/data`) and another for images (for example, `/data/images`). - To import images, include the images in an .html file using the `<img>` tag and `src` attribute. Ensure that the `src` value is a relative path from the .html file to the image folder. - Images must be `.png`, `.gif`, or `.jpeg` files. - Each image file can't exceed 1 MB. - 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	In Lightning Knowledge, custom file fields are replaced with Salesforce Files. Enter the path relative to the file's location. If the specified path doesn't exist, the related article isn't imported. Note the following information about importing files. - We recommend that you create a folder for your files (for example, `/files`). - Each file must not exceed 5 MB.
Category groups	Use unique category names to categorize articles. Use the plus symbol (+) to specify more than one category. For example, `Laptop+Desktop`. Note the following information about data category groups. - Leaving the cell row empty causes your article to be set to No Categories. - If you specify a category and its parent (for example, Europe+France) the import process skips the child category France and keeps the parent category Europe, because application of a parent category implicitly includes the category's children. - When importing articles with translations and associated data categories, only the primary article retains the data categories. The article translations have no associated data category upon import.

Consideration	Notes
Channels	Specify articles' channels using the keywords. • `application` for Internal App. If you don't specify a channel, `application` is the default. • `sites` for Public Knowledge Base. • `csp` for Customer. • `prm` for Partner. Use the plus (+) symbol to specify more than one channel (for example, `application+sites+csp` to make an article available in all channels). When importing articles with translations and associated channels, only the primary article retains the channels. The article translations have no associated channels upon import.

👁 **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. 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
```

Example `articlestranslationsimport.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
```

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

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_US	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_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

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
DateFormat	Format of the date to read in the .csv file	yyyy-MM-dd
DateTimeFormat	Format of the date and time to read in the .csv file	yyyy-MM-dd HH:mm:ss
CSVEncoding	Character encoding used to read the .csv file	ISO8859_15_FDIS
CSVSeparator	.csv field separator	,
RTAEncoding	Default encoding used for the HTML files (if not specified in the `charset` attribute from the HTML `meta` tag). Salesforce does not support UTF-32 character encoding. We recommend using UTF-8. If you use specify UTF-16 character encoding, ensure that your HTML files specify the right byte-order mark.	ISO8859_15_FDIS

> **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 2011111 can be interpreted as 2011-01-11 or 2011-11-01. Specify at least:
> - Two digits for month and day format (MM, dd)
> - Four digits for year format (yyyy)
>
> If a date in the .csv file does not match the date format specified in the property file, the related article is not imported.

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

> **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.

🛑 **Important:** Where possible, we changed noninclusive terms to align with our company value of Equality. We maintained certain terms to avoid any effect on customer implementations.

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:

   a. In Lightning Knowledge, select **Knowledge Base** from the dropdown.

   b. 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.

6. Click **Import Now**.

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

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

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 can 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	The import or export is complete. Successfully imported articles are shown on the Article Management tab on the Articles subtab. Successfully imported translations are listed on the Translations subtab.	This status doesn't mean the import or export is successful. Click **Email Log** to check the details of your import or export. Click the exported .zip file to save or open the file on your system.

SUPPORT KNOWLEDGE ARTICLES IN MULTIPLE LANGUAGES

Reach a wider audience by providing knowledge articles in any Salesforce-supported languages. Translate articles in-house or work with a localization vendor.

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). Different languages can use different translation methods. For example, you may want to export articles to a localization vendor for French translations, but assign articles to an internal Knowledge user for Spanish translations.

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. To hide translated articles for a specific language, deselect Active next to the language on the Settings page.

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.

Translate Articles in Salesforce Classic
If your organization translates Classic Knowledge articles internally, you can enter the translation from the translation detail page.

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.

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. 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.

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_JIIS)

    - 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.

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.

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**.

Translate Articles in Salesforce Classic

If your organization translates Classic Knowledge articles internally, you can enter the translation from the translation detail page.

Depending on the status of your translation and the article actions assigned to you, 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 primary article.
Assign...	Assigning changes the owner of the translation.	Draft translations
Delete	Deleting a translation permanently removes it from the knowledge base. 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. Voting and Chatter information is not available when previewing a Knowledge article.	Draft and published translations
Publish...	Publishing translations makes them visible in all channels selected.	Draft translations

You can't change channels on an article translation and then publish the article. Doing so generates an error.

When you change channels on an article, make sure that the channels on the article's translations match the new channels. Also, publish translations before you publish the primary language version.

1. Click the **Article Management** tab and select **Translations** in the View area.

2. Select **Draft Translations**.

   📝 Note: You can also edit a published translation. It reverts to draft status until you republish it, although you can choose to keep the existing version published while you update it.

3. Optionally, change the `Assigned To` filter to view articles that are not assigned to you for translation.

   For example, you want to view articles assigned to a translation queue.

4. Click **Edit** next to the article and language you want to translate.

5. Enter your translation.

6. Click **Save**.

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.

Agent's 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 dues 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.

Search Articles and External Sources on the Knowledge Tab
Use a single search to find all your resources at once.

Create and Edit Articles
You can create or edit an article from the Knowledge tab or Article Management tab. If you're creating an article, you may need to select the article type and language. If you're editing a published article or translation, choose whether to leave it published while you work on a draft copy, or whether to remove the original article from publication and work on it directly. If you work on a copy, publishing the copy replaces the last published version of the article. If you work on the original article, it is unavailable in the channels until you republish it.

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.

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.

Salesforce Knowledge Article Versions
Article versions allow you to save an older version of a published article and then see which version of the article is associated with a case. To save the previous version, select the `Flag as new version` checkbox when publishing a new version. The previously published version is saved and the new version is published with the next sequential version number as an identifier.

Delete Articles and Translations
You can delete articles and translations on the Article Management tab or the detail page of the article or translation. Deleting permanently removes articles from the knowledge base. You can delete draft articles, draft translations of articles, or archived articles, but not published articles or translations.

Articles or Knowledge Tab
Find out which Salesforce Knowledge tab you are using and what you can do on each.

Search Articles and External Sources on the Knowledge Tab

Use a single search to find all your resources at once.

1. Enter your search terms in the Search box.

   You can use search wildcards and operators in your search terms. If your organization has any auto-complete options enabled, you can select from the suggestions.

   📝 Note: In the auto-complete dropdown, article titles have a paper icon while the keywords have a magnifying glass icon.

2. Click the search icon or press **Enter** on your keyboard.

3. Optionally, select filters to refine your search results.

   Depending on the source you are searching, filter by language, data category, article status, article type, and article validation. Click **Reset** to return all filters to their default setting.

   - When `All` is selected, you can filter by language and data category, depending on what your organization supports.
   - When `Articles` or `My Draft` is selected you can filter by:
     - Article status: Published, Draft, and Draft Translations
     - Language: Values depend on those supported in your org
     - Data categories: Values depend on those created in your org
     - Article type: Values depend on those created in your org
     - Validation Status: No Filter (all articles), Not Validated (articles that are not validated), Validated (validated articles), and any other values supported in your org such as in review.

- When an external source is selected, there are no filters, and the general article information displayed is controlled by your external object search layout.

4. For articles, you can sort by:

   - Published Date
   - Best Rating
   - Most Viewed
   - Title: A to Z
   - Title: Z to A

5. View information by clicking the article or external source title. Below the title you can find general article information such as: new article indication, article number, article type, validation status, last published date, article view comparison, and article rating comparison.

6. Use the dropdown by each article to follow or unfollow, edit, publish, and delete an article, depending on your permissions.

Promote Articles in Search Results

Associate keywords with knowledge articles to optimize search results in Salesforce Knowledge. Users who search for these keywords by pressing **Enter** (Windows) or **Return** (Mac) see the article appear first in their search results.

Article Search Results

How search works for knowledge articles depends on your use of search options, search terms, wildcards, and operators. Salesforce Knowledge search uses the same custom search algorithms that are available throughout Salesforce, which include mechanisms such as tokenization, lemmatization, and stopword lists, to return relevant search results.

Promote Articles in Search Results

Associate keywords with knowledge articles to optimize search results in Salesforce Knowledge. Users who search for these keywords by pressing **Enter** (Windows) or **Return** (Mac) see the article appear first in their search results.

Promoted search terms are useful for highlighting an article that you know is commonly used to resolve a support issue when a user's search contains certain keywords. An article must be published for you to manage its promoted terms.

1. To change the promoted search terms, open the published article.

2. In the Promoted Search Terms related list, click **New** or **New Promoted Term**.

3. Enter the keywords that you want to associate with the article.

   - You can associate the same term with multiple articles. If the user's search matches the promoted term, all associated articles are promoted in search results, ordered by relevancy.

   - The maximum number of characters per promoted term is 100. For best results matching users' search terms, limit each promoted term to a few keywords.

4. Click **Save**.

   👁 Example: For example, if an article addresses a common support issue such as login problems, you can associate the terms `password` and `password change`. Article search matches a promoted term whenever all keywords within the term occur within the user's search terms, in any sequence. Each keyword must match exactly. For example:

   - The promoted term *password* matches a search for `change password`.

   - The promoted term *password change* matches a search for `how do I change my password` but doesn't match `forgot password`.

   - The promoted term *password* doesn't match a search for `change passwords`.

Consider these limitations and general limits when you use promoted search terms.

- Your organization can create a maximum of 2,000 promoted terms. For best results, use them selectively, create a limited number of promoted terms and a limited number of promoted articles per term.

- If your organization translates articles into multiple languages, each promoted term is associated with one article version and the article version's language. If you need equivalent promoted terms to be associated with each translation, you must specify promoted terms for each translation. For example, associate change password with an English language article version and changer `mot de passe` with a French language article version.

- The end user's language setting determines the scope of the article search. Search results exclude article versions and any associated promoted terms that aren't in the user's language.

- When a user performs a Knowledge search, the search engine retrieves all the articles with at least one promoted search term that matches the user's terms. Then it places those articles at the top of the search result list.

- When a user searches for Chinese, Japanese, Korean, and Thai (CJKT) terms, search results can be inaccurate. Simplify the term in Promoted Search, or create an additional field on the article and add the term.

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 create, edit, and delete promoted search terms:
- Manage Promoted Search Terms

Article Search Results

How search works for knowledge articles depends on your use of search options, search terms, wildcards, and operators. Salesforce Knowledge search uses the same custom search algorithms that are available throughout Salesforce, which include mechanisms such as tokenization, lemmatization, and stopword lists, to return relevant search results.

Many factors influence the order in which articles appear in the results list. Salesforce evaluates your search terms and your data to move more relevant matches higher in your list of results. Some of these factors include:

- Operators—When you don't specify an operator in your article search, the search engine determines the best operator to use.

  Many searches use "AND" as the default operator. When you search for multiple terms, all the terms must match to generate a result. Matching on all terms tends to produce search results that are more relevant than searches using the "OR" operator, where matches on any of the search query terms appear in the results.

  If the search engine doesn't return any results that match all the terms, it looks for matches using the "OR" operator. With the "OR" operator, the search engine boosts documents that contain more terms from the search query, so that they appear higher in the results list.

- Frequency—This algorithm calculates the frequency with which a term appears within each article. The algorithm then weighs them against each other to produce the initial set of search results.

- Relevancy—Articles that are frequently viewed or that are frequently attached to cases appear higher in the results. Article ownership and recent activity also boost an article in the results list.

- Proximity of Terms—Articles that contain all the keywords in a search are ranked highest, followed by articles with fewer keywords, followed by articles with single keyword matches. Terms that are closer together in the matched document, with few or no intervening words, are ranked higher in the list.

- Exact Matches—Matches on exact keywords are ranked higher than matches on synonyms or lemmatized terms.

- Title Field—If any search terms match words in an article title, the article is boosted in the search results.

- Token Sequence—If the search term is broken up into multiple tokens because it contains both letters and numbers, the system boosts results based on the same sequence of tokens. That way, exact matches are ranked higher than matches on the tokens with other tokens in between.

Create and Edit Articles

You can create or edit an article from the Knowledge tab or Article Management tab. If you're creating an article, you may need to select the article type and language. If you're editing a published article or translation, choose whether to leave it published while you work on a draft copy, or whether to remove the original article from publication and work on it directly. If you work on a copy, publishing the copy replaces the last published version of the article. If you work on the original article, it is unavailable in the channels until you republish it.

> ✏️ **Note:** When applying categories, choose the categories that a user would naturally look for as they navigate. Users only find an article if they select its explicitly applied category, the parent of that category, or a child of that category.
>
> Since the Summer '20 release, standard Salesforce sharing for Lightning Knowledge is available. Switching to standard sharing changes how you work with data categories and how users can access Knowledge articles. See Sharing Considerations for Lightning Knowledge for more about sharing for Lightning Knowledge.

Once your article is complete, you can assign it to another agent to edit or review the article, publish the article directly, or submit the article for approval. If you have the "Publish Articles" article action and an approval process is set up for an article, you'll see both **Publish...** and **Submit for Approval** buttons..

Smart Links to Salesforce Knowledge Articles
Link between articles or embed links to articles in external websites and resources. With smart links, your users always get to the right version because the links are automatically updated based on the article channel, version, and URL name.

Smart Links to Salesforce Knowledge Articles

Link between articles or embed links to articles in external websites and resources. With smart links, your users always get to the right version because the links are automatically updated based on the article channel, version, and URL name.

Insert Smart Links into Articles

Smart links go to the right article and version, even when a new version is published or the URL name changes. You create smart links in your article's rich text fields, so rich text fields must be enabled.

Create Smart Links with the Link Tool

Add a smart link from one Salesforce Knowledge article to another by manually entering the article URL in the rich text editor.

Insert Smart Links into Articles

Smart links go to the right article and version, even when a new version is published or the URL name changes. You create smart links in your article's rich text fields, so rich text fields must be enabled.

1. Edit an article.

2. In the rich text editor toolbar, click the Smart Link icon [icons] .

3. Optional: Choose the publication status and, if your knowledge base has multiple languages, choose the language.

4. In the Link to Article list, select an article.
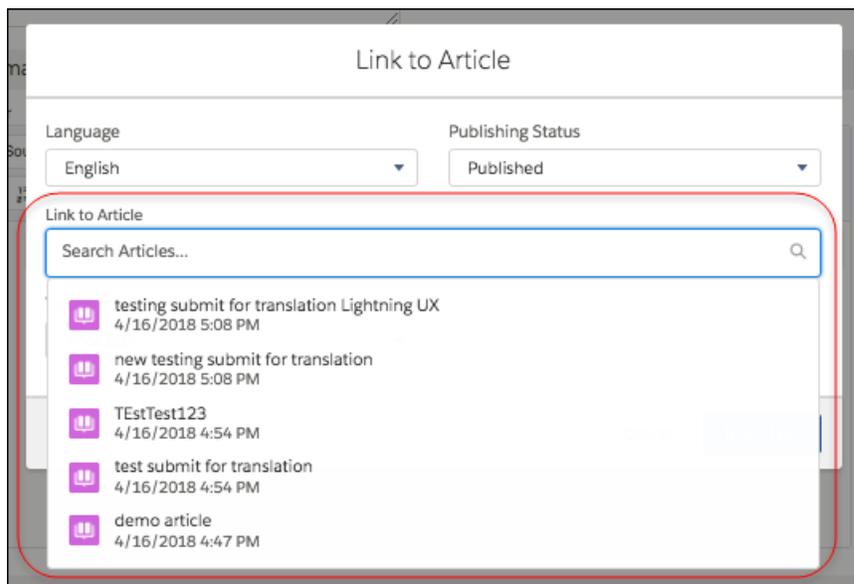
5. Optional: To specify how the smart link opens in public sites and Salesforce Classic, select the target from the dropdown.

6. Optional: To specify how the link opens in Lightning Experience apps and consoles, select the Lightning target.

7. Click **Insert Link**.

   Smart links use more characters than what is displayed in the editor. If you see an error that you have surpassed the character limit, have your administrator increase the limit.

Target Behavior for Smart Links

You can specify how smart links open using the different types of target options. Understand the behavior of each option and how smart links created in Salesforce Classic behave in Lightning Experience.

Smart Link Considerations

Keep these considerations in mind when you use smart links.

Target Behavior for Smart Links

You can specify how smart links open using the different types of target options. Understand the behavior of each option and how smart links created in Salesforce Classic behave in Lightning Experience.

Target Options

The target corresponds to the link's `target` attribute in the source HTML. This target determines how links open in Salesforce Classic and outside Salesforce, like in your Salesforce and Experience Cloud sites.

- Not set—If you don't choose a target, the system sets the attribute to `_blank` when you save the article.
- Frame—Opens the linked article in a designated frame
- New Window (`_blank`)—Opens the linked article in a new window or tab.
- Topmost Window (`_top`)—Opens the linked article in the full body of the window.
- Same Window (`_self`)—Opens the linked article in the same frame.
- Parent Window (`_parent`)—Opens the linked article in the parent frame.

Lightning Target Options

The Lightning target corresponds to the link's `data-lightning-target` attribute in the source HTML. This target determines how links open in Lightning Experience apps and consoles.

- Not set—When the Lightning target isn't set, the system uses the default behavior, `_blank`, which opens a new browser tab
- Lightning App Default (`_new`)—Opens a new workspace tab or subtab in console apps, depending on the user's context. Opens a new browser tab in apps with standard navigation.
- Same Tab or Workspace (`_self`)—Opens a new workspace tab or subtab in console apps, depending on the user's context. Opens in the same tab in apps with standard navigation.
- New Browser Tab (`_blank`)—Opens a new browser tab.
- New Workspace (`_workspaceTab`)—Opens a new workspace tab in console apps. Opens a new browser tab in apps with standard navigation.
- New Subtab (`_subtab`)—Opens a new tab in console apps. Opens in the same tab in apps with standard navigation.

What Happens in Lightning When the Lightning Target Isn't Set?

If the target attribute isn't set, a smart link opened in Lightning opens in a new browser tab. The `data-lightning-target` attribute is assumed to be `_blank`.

When `target` is specified but not the Lightning `data-lightning-target`, the system uses this default behavior for links opened in Lightning Experience.

- If the target is set to `_blank`, the Lightning target uses the Lightning App Default (`_new`).
- If the target is `_self`, `_top`, or `_parent`, the Lightning target is Same Tab or Workspace (`_self`).
- If the target is a custom frame name, the Lightning target is New Browser Tab (`_blank`).

Smart Link Considerations

Keep these considerations in mind when you use smart links.

- Smart links use more characters than what is displayed in the editor. If you see an error that you have surpassed the character limit, have your administrator increase the limit.

- Smart links in Experience Cloud sites must use the Article Content component. Smart links don't resolve properly when using custom components.

- If you don't select a language, Salesforce returns articles in your org's default language when you search for an article to link.

- For legacy Knowledge subscriptions, smart links are based on the channels they're in. Therefore, legacy customers can't add a smart link to an article in another channel. For example, an article on a public knowledge base can't link to an article published only on internal channels. For new Knowledge customers, every article is part of an internal channel, so this qualification doesn't apply.

Create Smart Links with the Link Tool in Salesforce Classic

Add a smart link from one Salesforce Knowledge article to another by manually entering the article URL in the rich text editor.

1. Highlight the content or place your cursor where you want to add the link.

2.
   Click the link icon .

3. For Link Type, select **URL**.

4. For Protocol, select **<other>**.

5. Enter the article URL as `/articles/[language]/[articleType]/[URLName]`.

   For example, for an English article in a multiple language knowledge base, of article type FAQ, with a URL Name of About-Passwords the article URL is `/articles/en_US/FAQ/About-Passwords`. Add a language only if your Salesforce Knowledge base supports multiple languages.

6. Optionally, on the Target tab, select where the referenced article displays.

7. Click **OK**.

   Smart links use more characters than what is displayed in the editor. If you see an error that you have surpassed the character limit, have your administrator increase the limit.

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 and, optionally, time. Articles you scheduled for publication later continue to appear in the Draft Articles filter, now with the pending icon (🕐) next to the article title in Salesforce Classic. To see the publication date, hover over the icon. The pending icon (🕐) isn't available in Lightning Experience.

  💡 Tip: To cancel a scheduled publication, click **Cancel Publication** on the article or translation detail or edit page.

- Publication times occur in 15-minute intervals, therefore we cannot guarantee publication will match the exact time you specify.

- A scheduled article's pending icon (🕐) isn't supported for list views.

- The pending icon (🕐) is shown only in Salesforce Classic's Article Management tab.

- The **Cancel Publication** button isn't available from a draft article in Lightning Experience.

- 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.

Table 1: Publishing Actions Available in Translated Articles

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

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

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 can 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.

- Archiving a Knowledge article in Lightning Experience also permanently deletes any published translations of the article.

- You can't archive an article's primary version when it still has an associated draft version.

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

Salesforce Knowledge Article Versions

Article versions allow you to save an older version of a published article and then see which version of the article is associated with a case. To save the previous version, select the `Flag as new version` checkbox when publishing a new version. The previously published version is saved and the new version is published with the next sequential version number as an identifier.

When an article is attached to a case and a new version of the article is published, the version attached to the case is flagged as being outdated. For example, if Version 2 is attached to a case and a third version is published, the article attached to the case becomes Version 2 (outdated). This notation ensures that there's a permanent record of which content was associated with the case.

When you click the version number in the Article View, and the Article or Translation Detail pages, you see the Version History list. In this list you can:

- View the list of archived versions.
- To view a version, click its title.
- Expand the version to view its field change history (if you have history tracking enabled for the article type and for fields).

By default, the system stores up to ten versions of an article, plus any versions that are attached to cases.

When several versions of an article exist, you can restore an older version and republish it. Click `Revert to Draft Version` to copy the archived version's content into a draft article, then republish it as a new version. You can also restore the older version of any associated translations at the same time.

> ✎ **Note:** When there's an existing draft for the article, the option to revert isn't available.

In Salesforce Classic, you can delete an older, outdated version of a published article by selecting `Delete This Version` from the article detail page. If you delete an article version related to a case, it's no longer be attached to the case. Translated article versions depend on the primary language article. If the primary language version is deleted, the translated versions are also deleted. In Lightning Experience, you can delete archived and draft versions only.

Versions also appear in custom reports, allowing you to find and read the article version attached to a case.

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.

Delete Articles and Translations

You can delete articles and translations on the Article Management tab or the detail page of the article or translation. Deleting permanently removes articles from the knowledge base. You can delete draft articles, draft translations of articles, or archived articles, but not published articles or translations.

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

Deleting articles moves them to the Recycle Bin, where you can restore them if you change your mind. If you delete an article with translations, the translations are also moved to the Recycle Bin. However, if you delete a single translation, you can't restore it. Deleting an article or translation may fail if another user or the system simultaneously modifies it while the deletion is being processed. You receive an error message when this occurs.

> **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 delete a draft article that is a working copy of a currently published article, the original published version is not affected but the draft version is permanently removed. It does not go to the Recycle Bin. You can edit the published version to work again on a draft copy.
> - In Salesforce Classic, when a user without delete access cancels editing a published article, the newly created article draft isn't deleted automatically. In Lightning Experience, when you edit a published article by clicking **Edit as Draft** and then click **Cancel**, the article draft isn't deleted automatically.

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.

Articles or Knowledge Tab

Find out which Salesforce Knowledge tab you are using and what you can do on each.

There are two tabs for searching Salesforce Knowledge articles: the Knowledge tab or the Articles tab. The one you use depends on when your organization started using Salesforce Knowledge or if it adopted the Knowledge tab.

The Knowledge Tab

If the search bar is at the top of the main frame of the page you are using the Knowledge One on the Knowledge tab.

The Knowledge tab merges functionality of the old Articles tab and the Article Management tab and uses federated search to search all your resources at once. On the Knowledge tab, you can:

- Search all your Salesforce Knowledge articles and any of your external data sources, such as Microsoft® SharePoint®.
- Filter articles by language and data categories.
- Sort articles by published date, rating, most viewed, and title.
- Use the **Create Article** drop-down to select an article type and create an article.
- Use the dropdown by each article to follow or unfollow, edit, publish, and delete an article, depending on your permissions.

 📝 Note: For information on article permissions see Classic Knowledge User Access on page 36.

Also, when you use case feed, the Knowledge tab layout is applied to the article sidebar.

📝 Note: Experience Cloud site members without the Knowledge One permission cannot access Knowledge through Experience Cloud sites. They also can't access Knowledge in Experience Cloud sites via Salesforce for Android or Salesforce for iOS.

To switch to the Knowledge One and the Knowledge tab, have your administrator add the `Knowledge One` permission to your profile or permission set.

The Articles Tag

If the search bar is in the left-side panel of the page you are using the Articles tab.
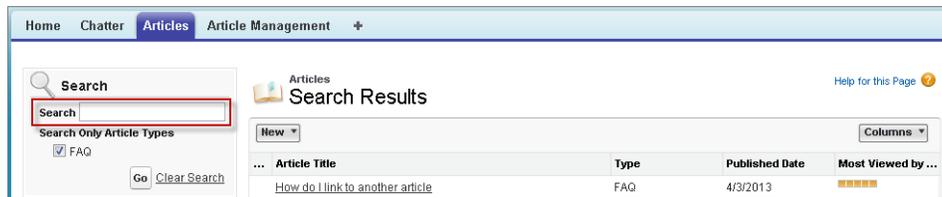
The Articles tab presents a list of your Salesforce Knowledge published articles. On the Articles tab, you can:

- Search for published articles
- View published articles
- Create an article
- Customize how the article information is displayed

CREATE DATA CATEGORIES FOR ARTICLES, ANSWERS, AND IDEAS

Data categories are used in Salesforce to organize and control access to groups of information. Data categories are used in Salesforce Knowledge, Ideas, Answers, and Chatter Answers.

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 sometimes contains 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.

Data Category Visibility

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

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.

> 📝 **Note:** Since the Summer '20 release, standard Salesforce sharing for Lightning Knowledge is available. Switching to standard sharing changes how you work with data categories and how users can access Knowledge articles. See Sharing Considerations for Lightning Knowledge for more about sharing for Lightning Knowledge.

The default maximum number of data categories is 100. If you require more than the allocated default maximum, you can ask Salesforce Support to increase the data category limits for the number of (active) data category groups, and the number of data categories within a group.

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
Data category assignments for translated articles	Data categories can be added only to the primary article. Data categories for translations are inherited from the primary article and can't be added.

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.

EDITIONS

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

Data categories are available in all editions with Knowledge except **Professional** Edition.

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.

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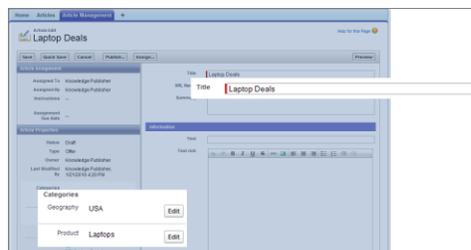
The next figure now illustrates an agent finding that same article published on the Articles tab; the agent has selected Laptops and USA respectively in the Products and Geography drop-down menus to retrieve an article that is classified with both Laptops and USA.

An Article About Laptop Deals on the Articles Tab
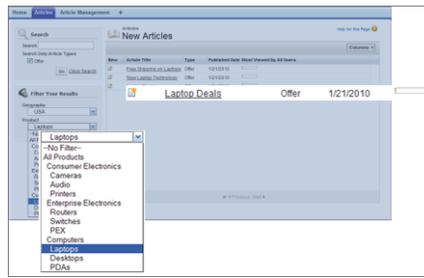
When you add categories to a category group, you build a hierarchy that can contain up to five levels of depth and up to 100 categories total. Each category can have one parent, many siblings, and many children. A robust and well-organized category hierarchy helps users find the articles that are relevant 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 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.

- 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.

- 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 sometimes contains 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 dropdown 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 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 `All`. Optionally, double-click `All` to rename it.

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.

Data Category Visibility

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

> **Note:** Since the Summer '20 release, standard Salesforce sharing for Lightning Knowledge is available. Switching to standard sharing changes how you work with data categories and how users can access Knowledge articles. The View All Records permission works only when standard sharing is enabled for Knowledge. See Sharing Considerations for Lightning Knowledge.

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

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

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 can't 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, Article Management tab, 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 dropdown 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 hasn't been set up, all users can see all data categories. However, if data category visibility is set, users with no data category visibility by 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 isn't 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 can't 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 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 don't 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 visibility for the Geography category group is revoked and has visibility only to the Products category group, the user sees only articles classified under the Products category. You can assign an answer zone to only one category group. So if you assign the Geography category group to the answer zone, and revoke a member's visibility for the group, the member can only see uncategorized questions.

For a detailed example, see Category Group Article Visibility Settings Examples.

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