

## USER MANUAL



# SalesPort – Knowledgebase (Classic Mode)

**Version: 1.0.1**

**WordPress Compatibility:**

WordPress: 4.0 to 5.0

**Salesforce Compatibility:**

Professional (API Should be enabled), Enterprise,  
Unlimited, Developer, Performance

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## Introduction

Salesforce knowledgebase add-on provides customers with the access to knowledge-based articles in the portal. Customer can view articles from the portal itself.

## Benefits of SalesPort-Knowledgebase

- Customer can get access to CRM's knowledge base articles from single portal interface.

## Prerequisites

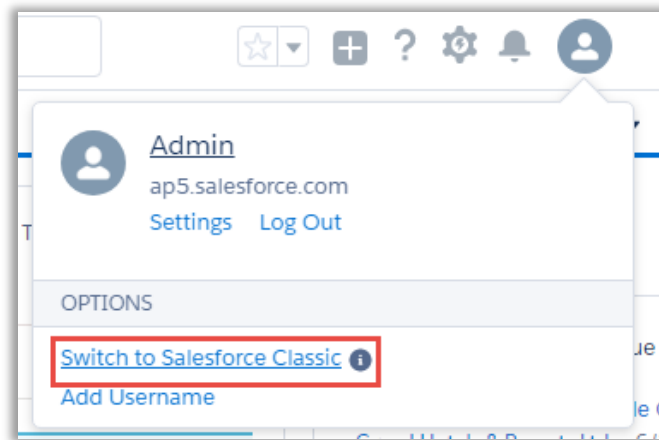
Following points must be followed before starting Installation:

- You must login as an Administrator in Salesforce.
- You must have a valid License Key Provided by CRMJety.
- Check WordPress site's compatibility with Knowledgebase add-on.
- Your WordPress site must have an SSL Certificate.
- You should be able to login as an admin in your WordPress site.
- You must create a connected app in Salesforce side.
- Knowledgebase module must be enabled from salesforce.
- You should also authenticate the connected app on the WordPress end.
- Supported Salesforce Editions: Enterprise, Unlimited, Developer, Performance, Professional (API should be enabled).

# Installation

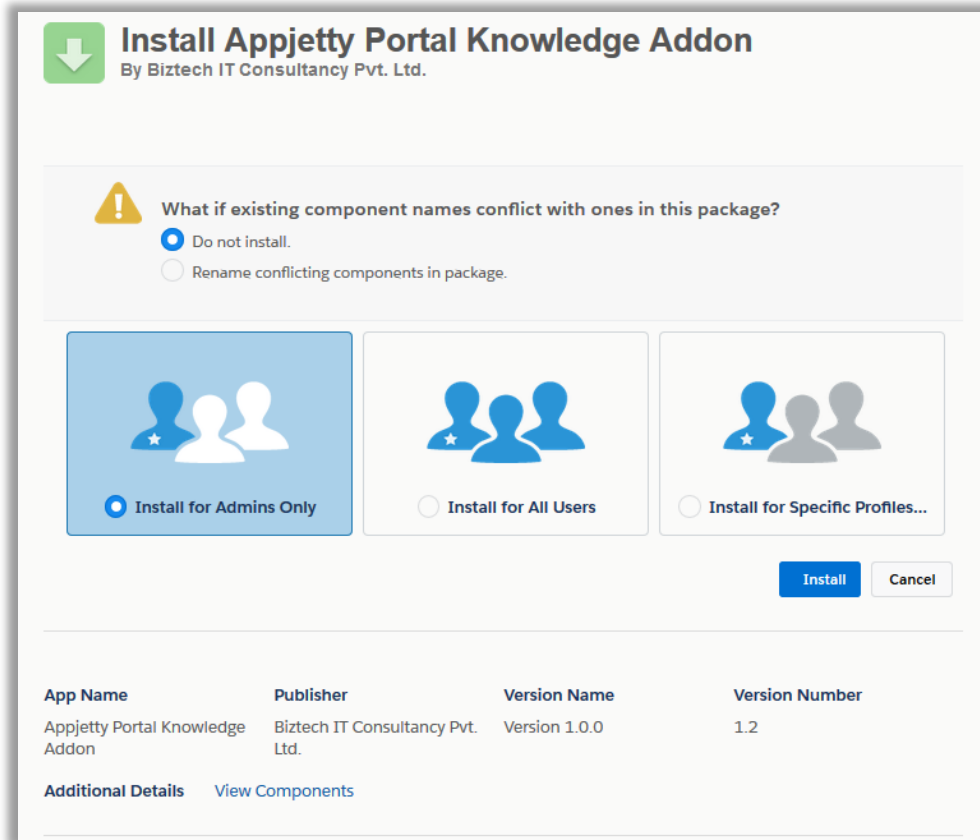
## Salesforce App Installation

- You can install Customer Portal in Salesforce through following modes:
  - Salesforce Classic
  - Salesforce Lightning
- To install Customer Portal using the Salesforce Classic Mode, switch to 'Salesforce Classic' mode.
- To switch the mode, navigate to **Admin -> Switch on Salesforce Classic**

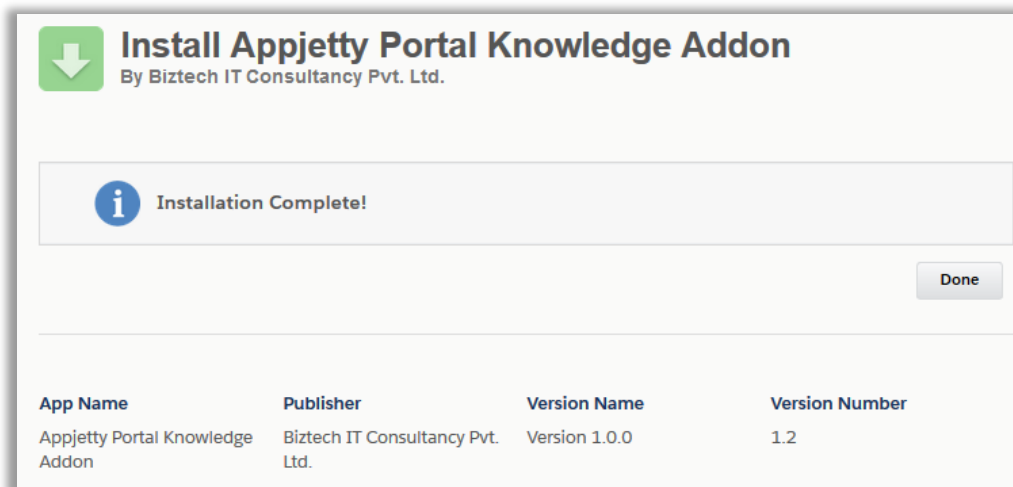


## Salesforce Classic

- To install the app, navigate to <https://login.salesforce.com/packaging/installPackage.apexp?p0=04t6F0000045UbO> URL.
- Now Select '**Install for Admins Only**' and click on '**Install**' button.



- After the installation is completed you will get a notification. To complete the installation, click on the 'Done' button.



- By clicking on 'Done' button, you will be redirected to the Installed Packages page and installed app will be listed in the 'Install Package' table.

## Installed Packages Help for this Page

On AppExchange you can browse, test drive, download, and install pre-built apps and components right into your salesforce.com environment. [Learn More about Installing Packages.](#)

[Visit AppExchange »](#)

Apps and components are installed in packages. Any custom apps, tabs, and custom objects are initially marked as "In Development" and are not deployed to your users. This allows you to test and customize before deploying. You can deploy the components individually using the other features in setup or as a group by clicking Deploy.

Depending on the links next to an installed package, you can take different actions from this page.

To remove a package, click **Uninstall**. To manage your package licenses, click **Manage Licenses**.

### Installed Packages

Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	AppExchange Ready
<a href="#">Uninstall</a>	<a href="#">Appjetty Portal Knowledge Addon</a>	Biztech IT Consultancy Pvt. Ltd.	1.2		10/8/2018 3:21 AM	✓	2	1	1	Not Applicable
<p>Description</p> <p>Salesport knowledgeBase is an add-on for Salesport - Customer Portal which helps you to manage knowledge articles from a portal.</p>										
<a href="#">Uninstall</a>	<a href="#">Appjetty Sales Customer Portal</a>	Biztech IT Consultancy Pvt. Ltd.	1.8 (Beta 2)	biztechcs	9/25/2018 1:22 AM	□	2	3	4	Passed

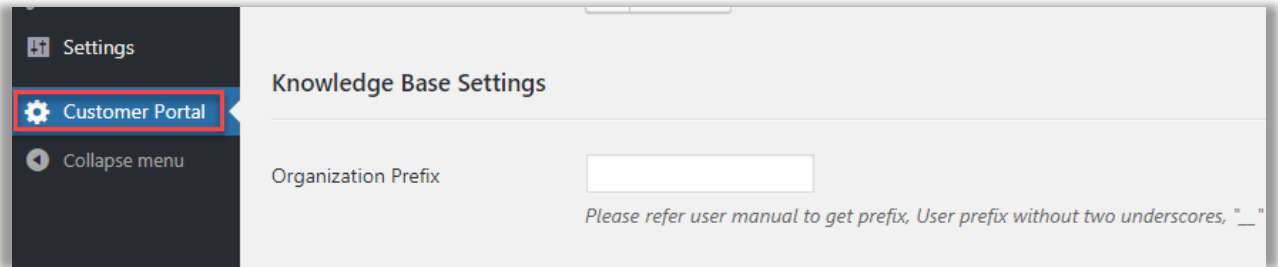
### Uninstalled Packages

No uninstalled package data archives

# Plug-in Configuration

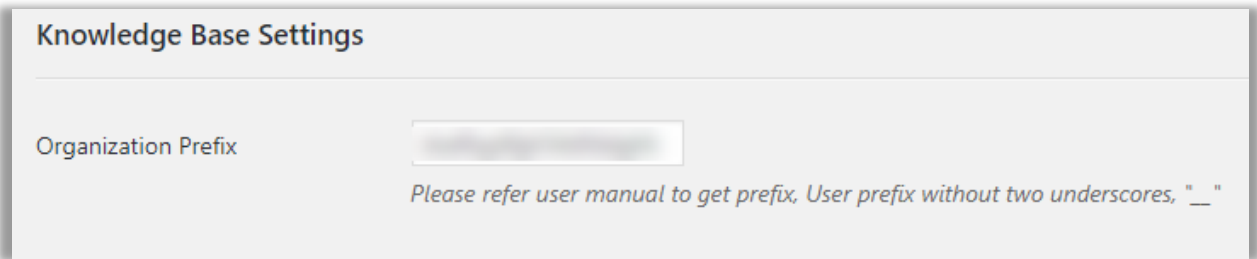
## WordPress Configuration Settings

- Go to WordPress admin side and click on ‘Customer Portal’ to configure Salesforce knowledgebase setting options.

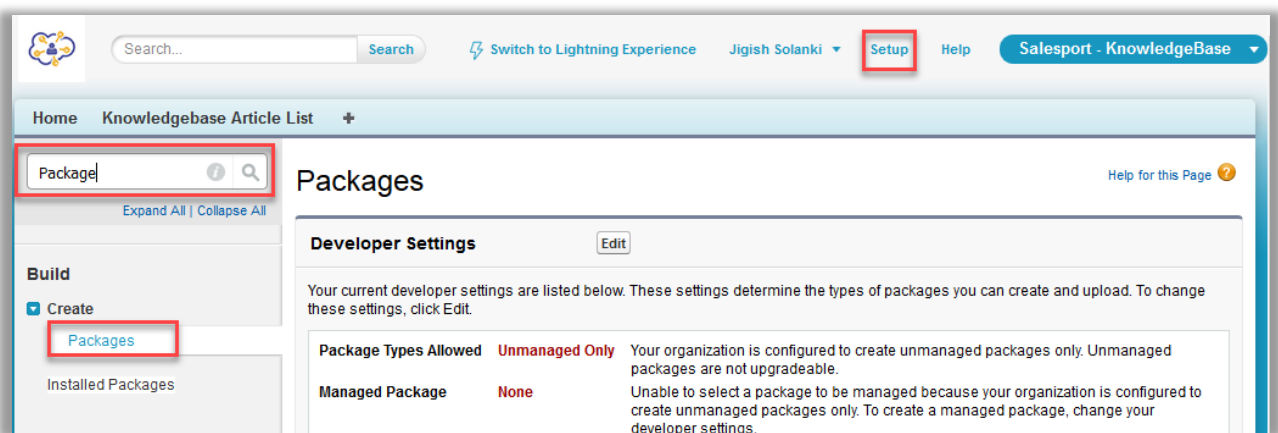


### Organization Prefix:

- To add the organization prefix, navigate to the ‘Knowledgebase Settings’ section in the Salesforce Customer Portal Settings page and enter prefix.



- To get organization prefix go to salesforce.



- Navigate to setup tab and search “Package Manager” in search bar.

- Click on package manager and you will be navigated to detail view.

**Packages** [Help for this Page](#)

**Developer Settings** [Edit](#)

Your current developer settings are listed below. These settings determine the types of packages you can create and upload. To change these settings, click Edit.

<b>Package Types Allowed</b>	<b>Unmanaged Only</b>	Your organization is configured to create unmanaged packages only. Unmanaged packages are not upgradeable.
<b>Managed Package</b>	<b>None</b>	Unable to select a package to be managed because your organization is configured to create unmanaged packages only. To create a managed package, change your developer settings.
<b>Namespace Prefix</b>	<b>dsf</b>	Unable to specify a namespace prefix for this organization because it is configured to create unmanaged packages only. To create a managed package, change your developer settings. <a href="#">What is this?</a>

**Packages**

A package contains components such as apps, objects, reports, or email templates. These packages can be uploaded to share with others privately or posted on AppExchange to share publicly. The list below displays all packages created by your organization. To create a new package, click New.

**Packages** [New](#)

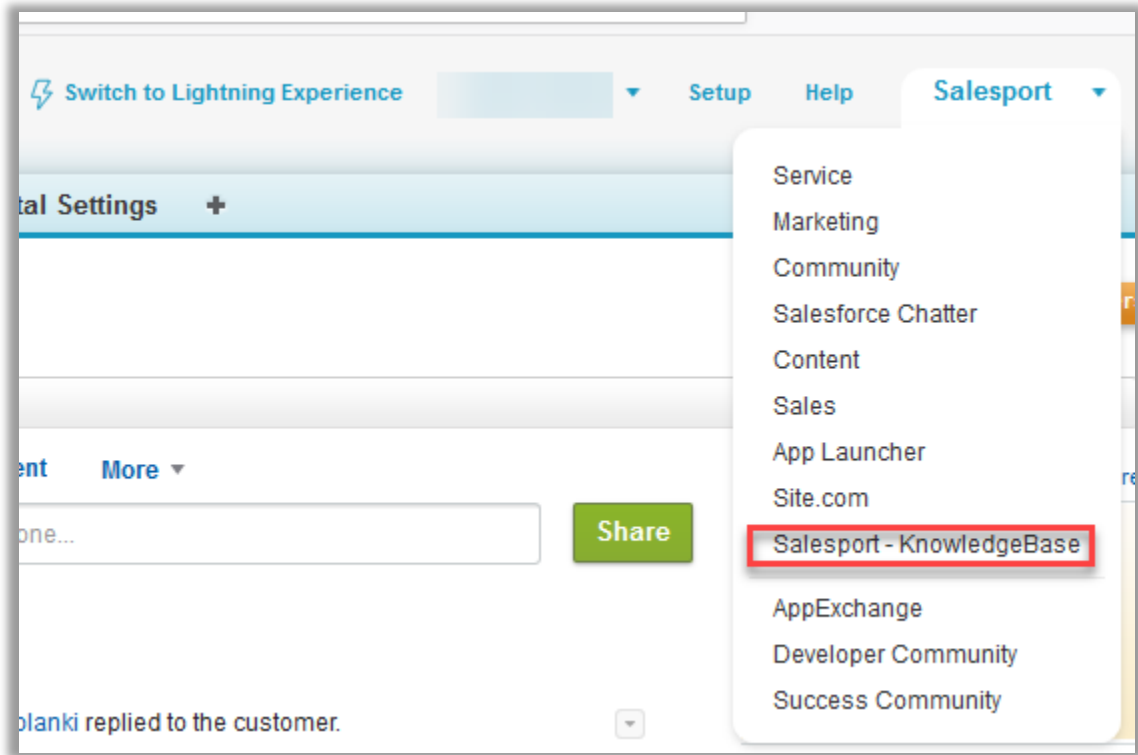
No Packages defined

- Add prefix from “Namespace Prefix”.

**Note:** If namespace prefix is not available in salesforce i.e. Its value is none, then you don’t need to add prefix in WordPress.

## SalesPort - Knowledgebase Classic App

- SalesPort knowledgebase Classic App Tab will contain all configurations and settings related to knowledgebase add-on.

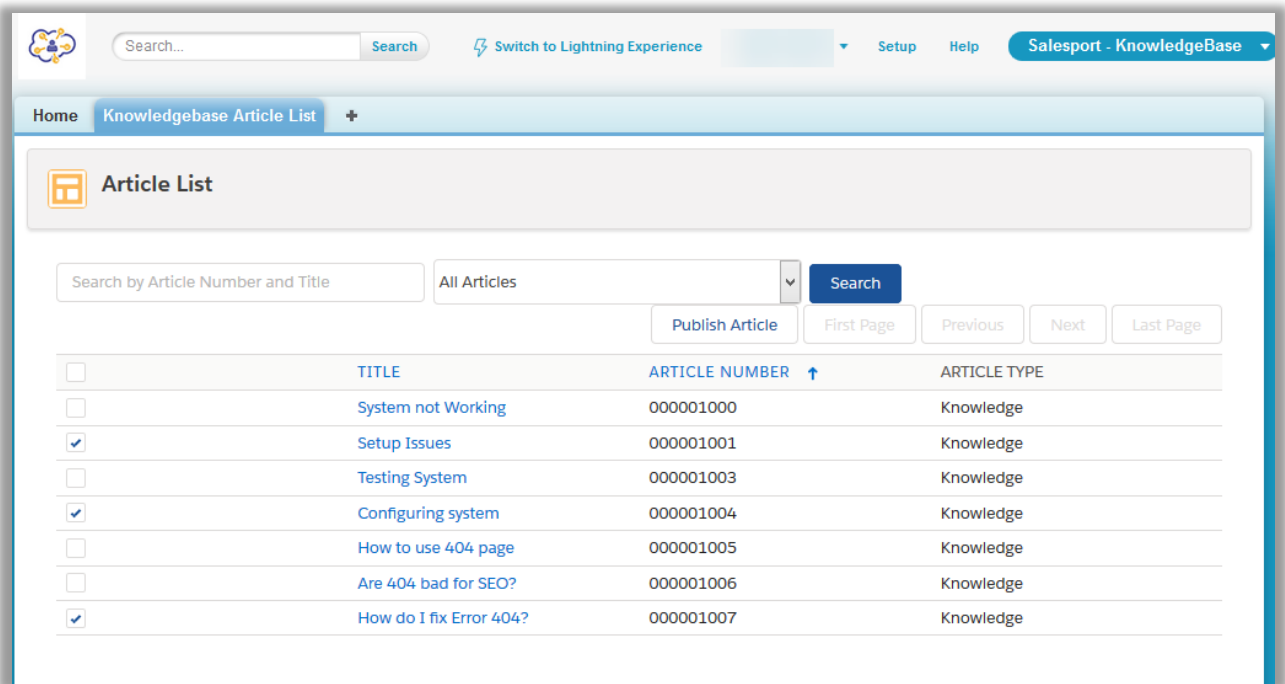


- For accessing classic app, click on “App Menu” and select “SalesPort - Knowledgebase” tab.
- You will get knowledgebase articles tab from where you can manage your articles.



## Publish Articles

- You will get knowledgebase articles tab from where you can manage your articles.
- To publish article, navigate to SalesPort – Knowledgebase tab from “App Menu”.
- You will get a list of Knowledgebase articles.



- Select articles and click on “Publish Article” button.

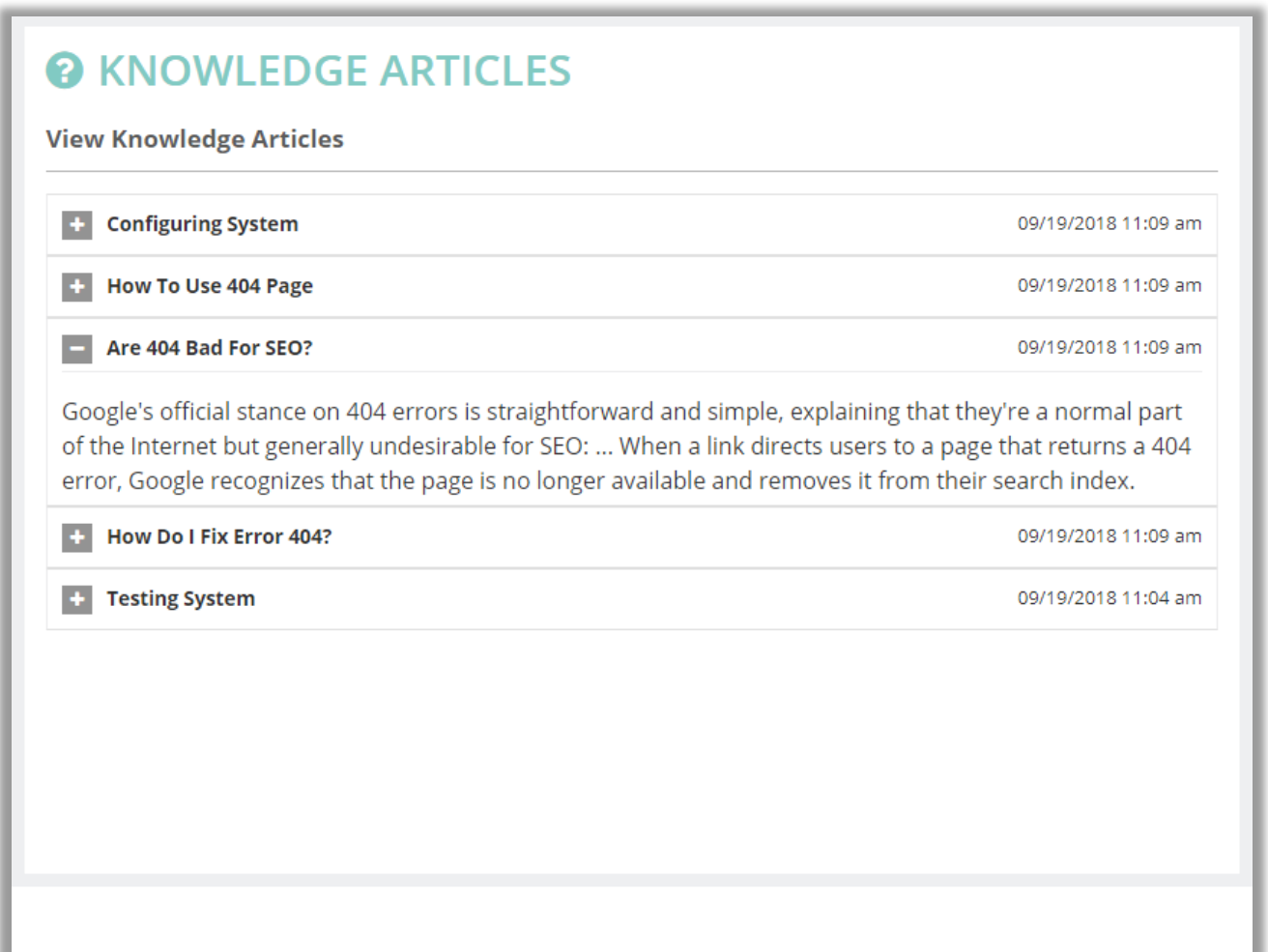
**Note:** Only published articles can be accessed from portal.

## Front Side Instructions

After completing all configurations at Salesforce and WordPress for Knowledgebase add-on, logged in customer can access **Salesforce Knowledgebase articles**.

### Knowledgebase Articles:

- Once you are logged in to portal.
- From modules, click on “Knowledgebase Articles” to view list of articles.



The screenshot displays the 'KNOWLEDGE ARTICLES' section. It features a header with a question mark icon and the title 'KNOWLEDGE ARTICLES'. Below the header is a sub-section titled 'View Knowledge Articles'. A table lists several articles with expand/collapse icons, titles, and timestamps. The article 'Are 404 Bad For SEO?' is expanded, showing a detailed paragraph of text.

Article Title	Timestamp
+ Configuring System	09/19/2018 11:09 am
+ How To Use 404 Page	09/19/2018 11:09 am
- Are 404 Bad For SEO?	09/19/2018 11:09 am
+ How Do I Fix Error 404?	09/19/2018 11:09 am
+ Testing System	09/19/2018 11:04 am

Google's official stance on 404 errors is straightforward and simple, explaining that they're a normal part of the Internet but generally undesirable for SEO: ... When a link directs users to a page that returns a 404 error, Google recognizes that the page is no longer available and removes it from their search index.

- Click on particular article to view details of that articles.

## Contact Us

We simplify your business, offer unique business solution in digital web and IT landscapes.



### Live Chat

- Get instant support with our Live Chat.
- Visit our product page at: <https://www.crmjetty.com/salesforce-wordpress-customer-portal.htm> and click on the Live Chat button for instant support.



### Tickets

- Raise tickets for your specific question!
- Send an email to [support@crmjetty.com](mailto:support@crmjetty.com) or you can login to your account @ [www.crmjetty.com](http://www.crmjetty.com) and click on My Support Tickets on your account dashboard, to get answers to your specific questions.

### Customization:

If you would like to customize or discuss about additional features for **SalesPort**, please write to [sales@crmjetty.com](mailto:sales@crmjetty.com)