

USER MANUAL



SalesPort – Knowledgebase (Classic Mode)

Version: 1.0.1

WordPress Compatibility:

WordPress: 4.0 to 5.2.2

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

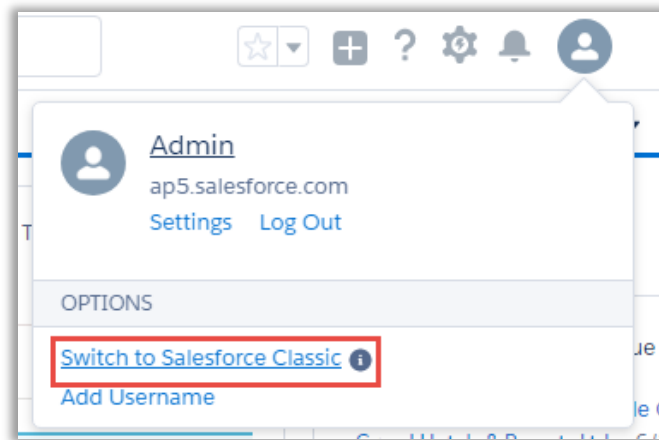
Following points must be followed before starting Installation:

- You must login as an Administrator in Salesforce.
- You must have a valid License Key Provided by CRMJetty.
- 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

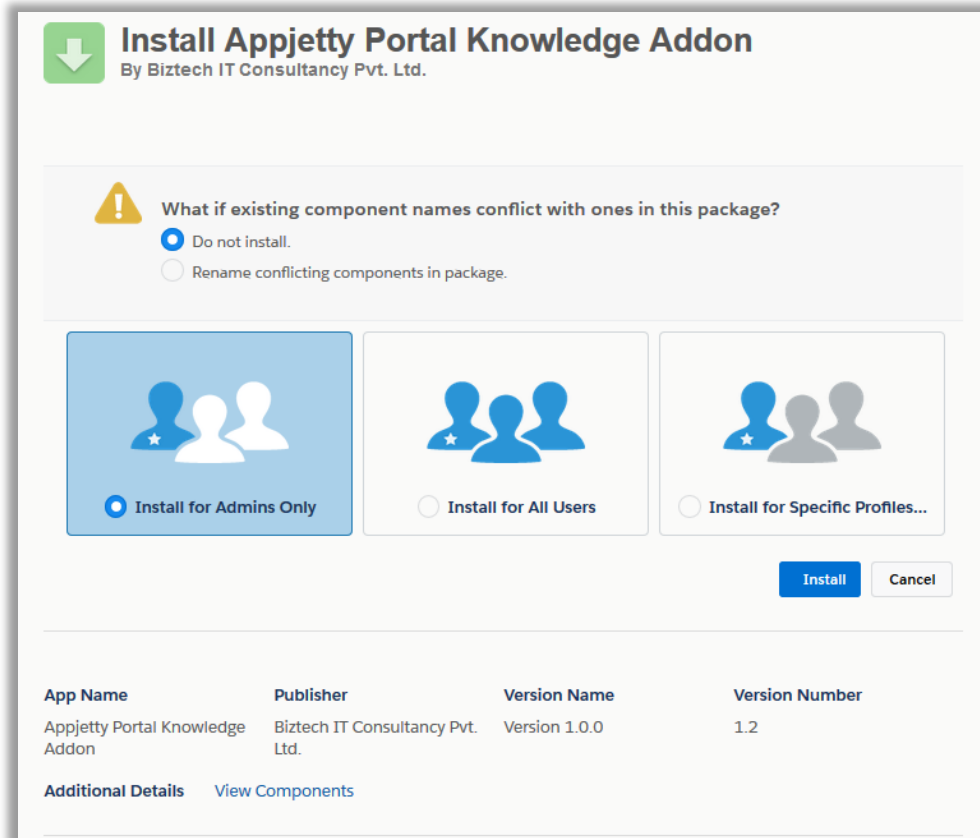
Salesforce App Installation

- 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**

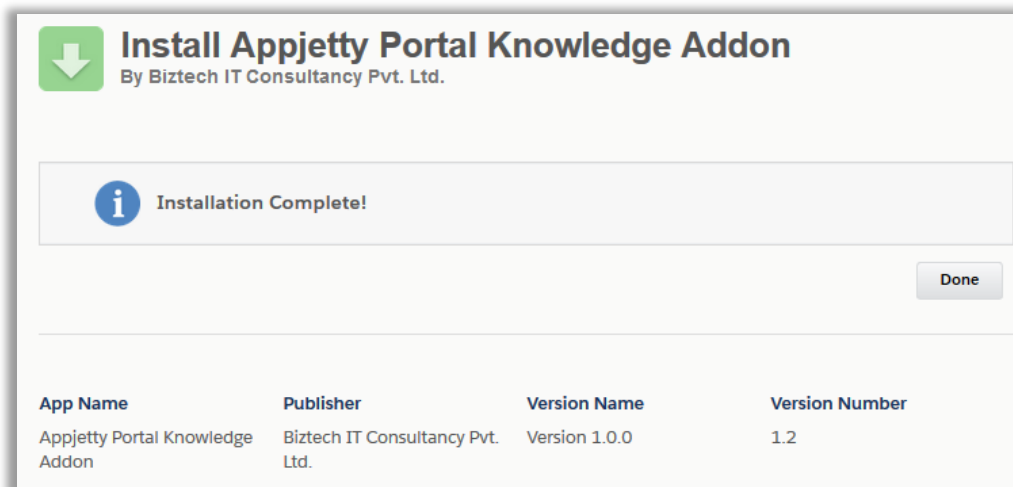


Salesforce Classic

- To install the app, navigate to <https://login.salesforce.com/package/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
Uninstall	Appjetty Portal Knowledge Addon	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>										
Uninstall	Appjetty Sales Customer Portal	Biztech IT Consultancy Pvt. Ltd.	1.8 (Beta 2)	biztechcs	9/25/2018 1:22 AM	□	2	3	4	Passed

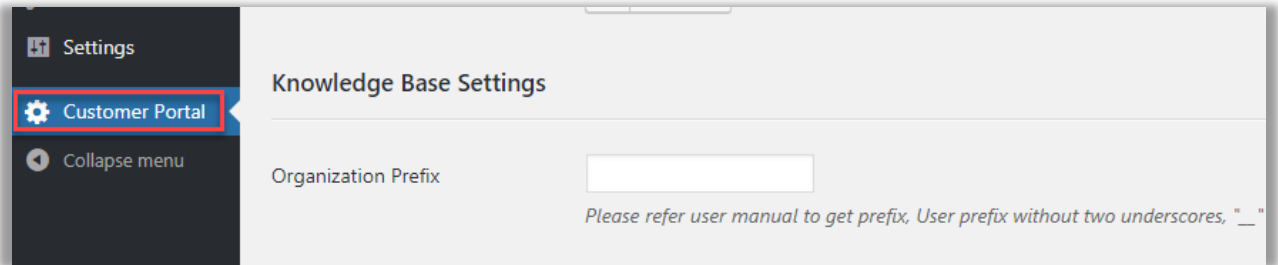
Uninstalled Packages

No uninstalled package data archives

Plug-in Configuration

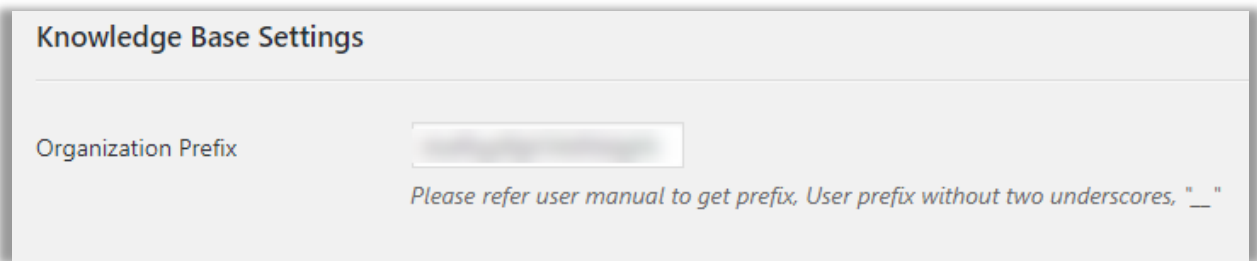
WordPress Configuration Settings

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

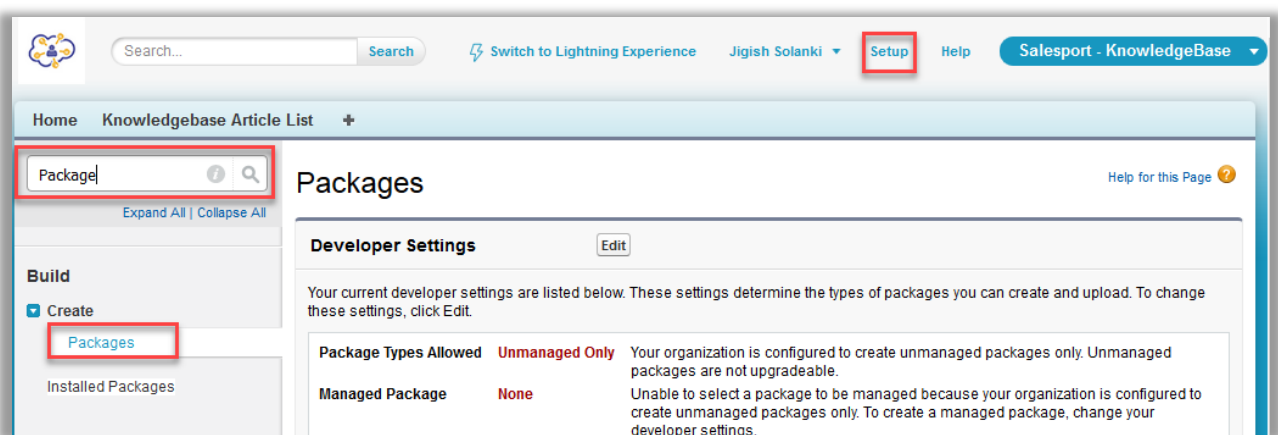


Organization Prefix:

- 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.

The screenshot shows the 'Packages' page in Salesforce. At the top, there is a 'Developer Settings' section with an 'Edit' button. Below this, a text block explains that current developer settings determine package types. A table lists three settings: 'Package Types Allowed' (Unmanaged Only), 'Managed Package' (None), and 'Namespace Prefix' (dsf). Each setting has a corresponding explanation of its effect. Below the settings is a 'Packages' section with a 'New' button and a message stating 'No Packages defined'.

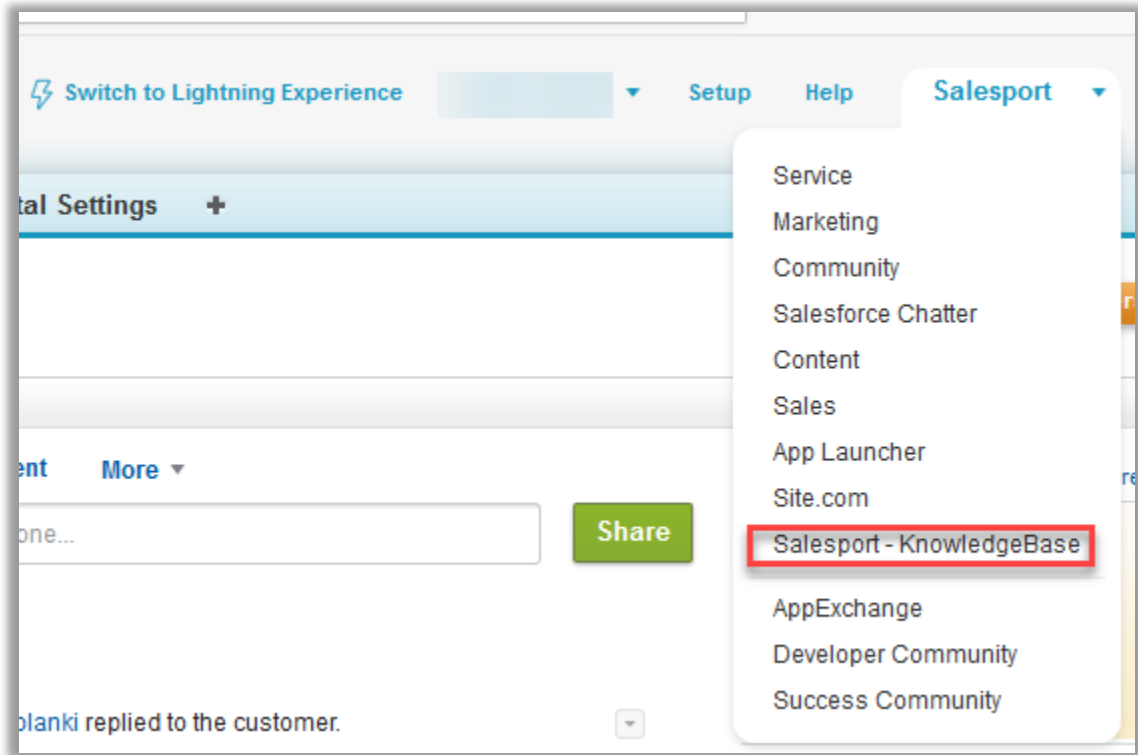
Setting	Value	Description
Package Types Allowed	Unmanaged Only	Your organization is configured to create unmanaged packages only. Unmanaged packages are not upgradeable.
Managed Package	None	Unable to select a package to be managed because your organization is configured to create unmanaged packages only. To create a managed package, change your developer settings.
Namespace Prefix	dsf	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. What is this?

- 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

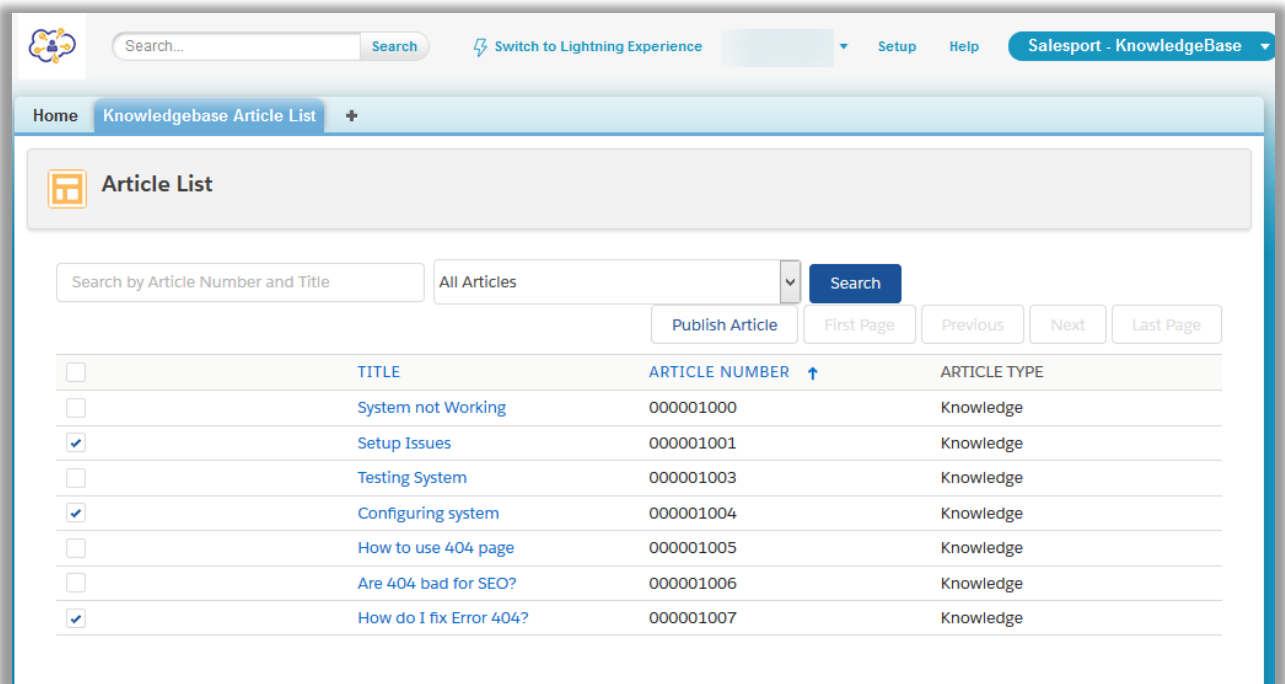
- SalesPort knowledgebase Classic App Tab will contain all configurations and settings related to knowledgebase add-on.



- 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.

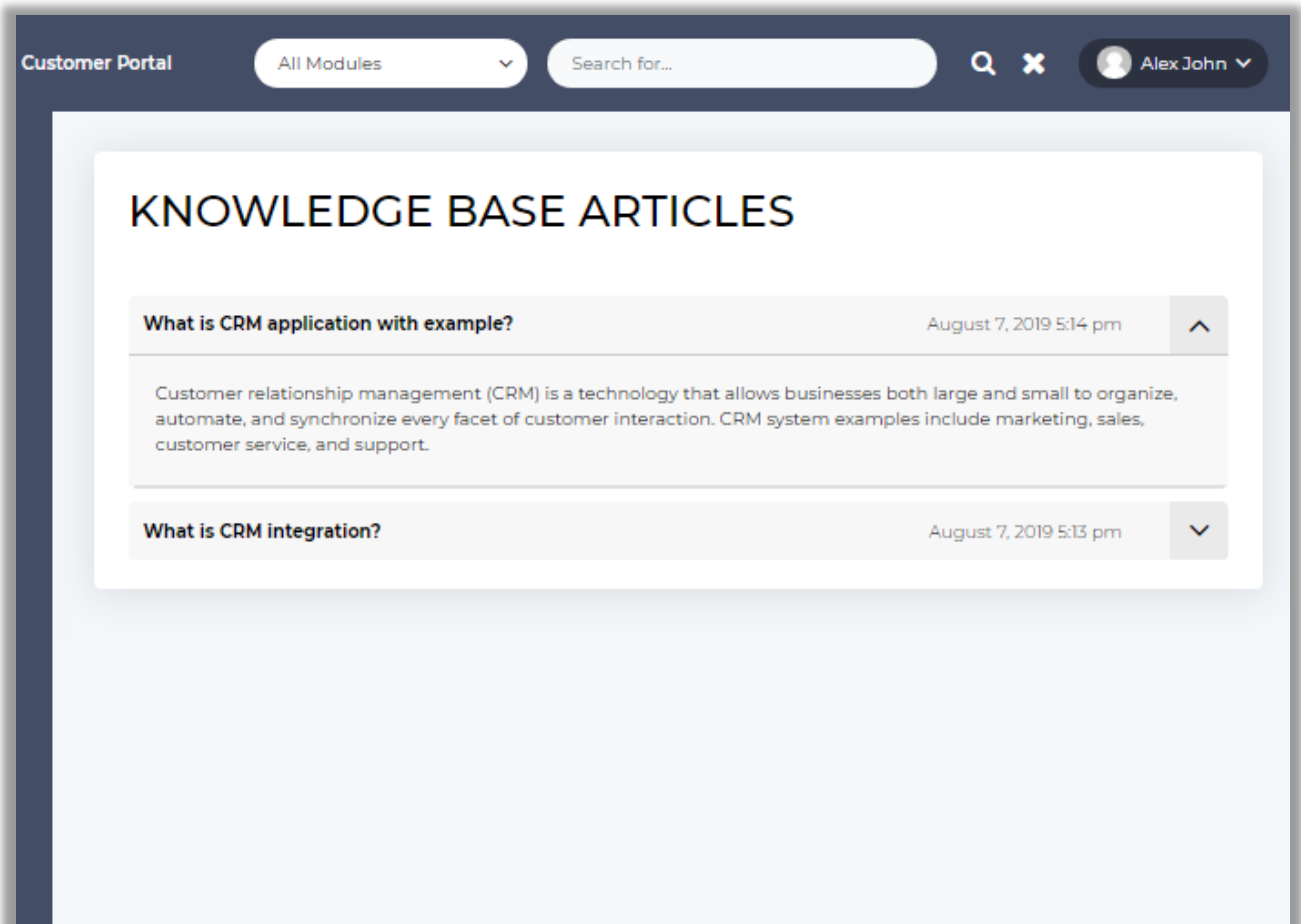
Note: Only published articles can be accessed from portal.

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.



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

Contact Us

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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 or you can login to your account @ 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