

USER MANUAL



SalesPort – Knowledgebase (Lightning 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 knowledge base add-on provides the access of a knowledge-based articles to customers. Customer can view articles from the portal itself.

Benefits of SalesPort-Knowledgebase

- From single portal interface, customers can get access to CRM's knowledge base articles.

Prerequisites

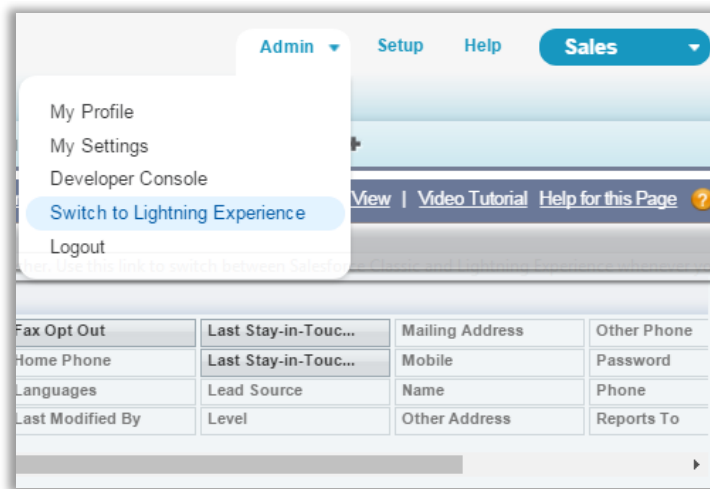
Following points must be followed before starting Installation:

- You should login as an Administrator in Salesforce.
- You must have a valid License Key Provided by CRMJetty.
- Check if WordPress site is compatible with Knowledge base add-on.
- WordPress site must have a 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

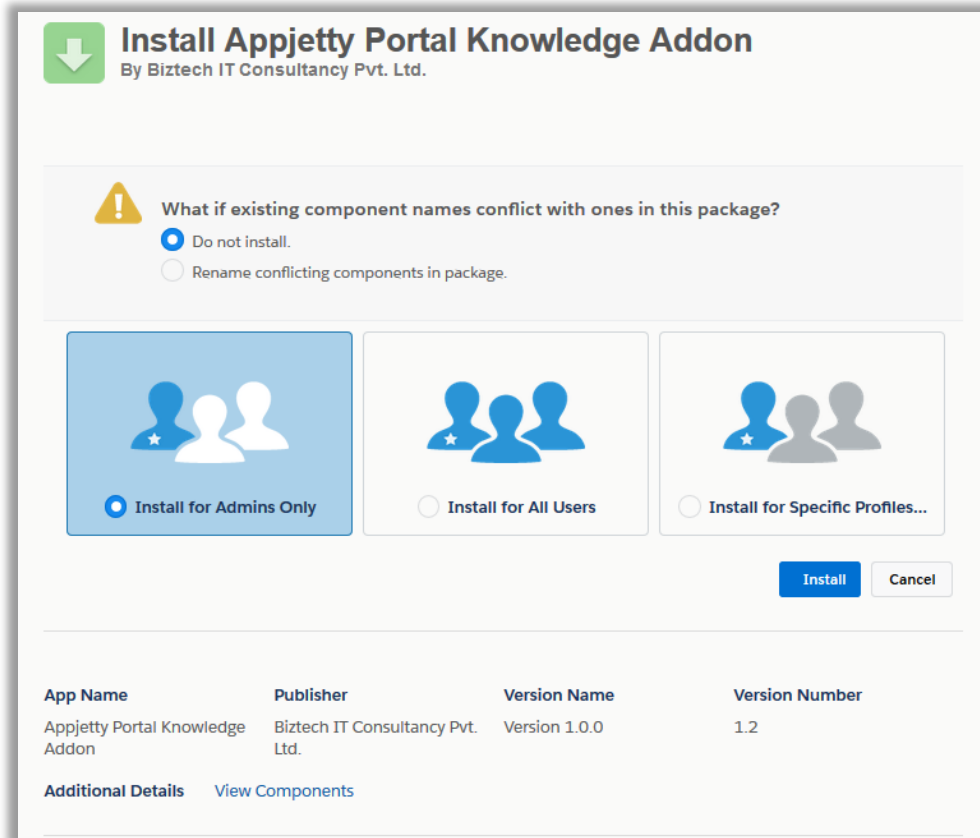
Salesforce App Installation

- You can install Knowledge base add-on in the Salesforce through following modes:
 - Salesforce Classic
 - Salesforce Lightning
- To install the app using the Salesforce Lightning mode, switch to Salesforce Lightning mode.
- To switch the mode, navigate to **Admin -> Switch on Salesforce Lightning Experience**

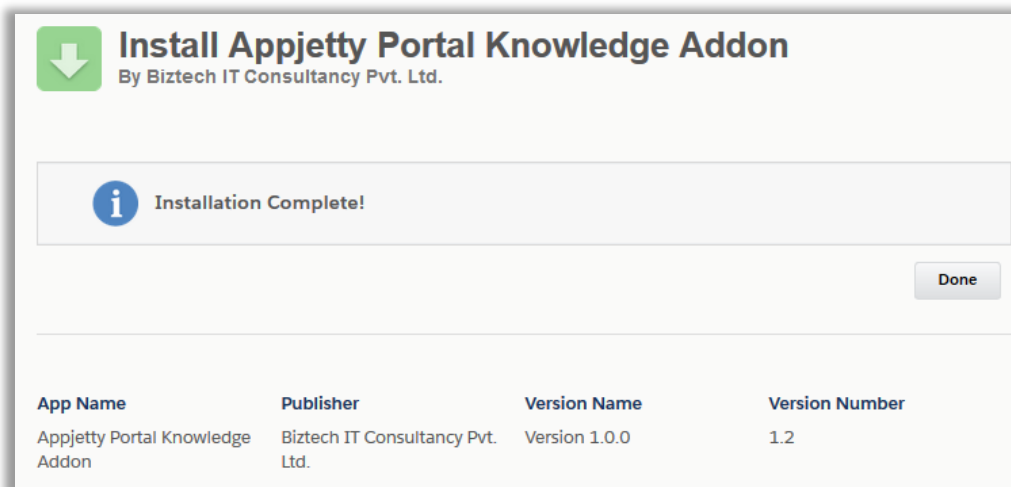


Salesforce Lightning

- 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 be notified through a notification. Now 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 |

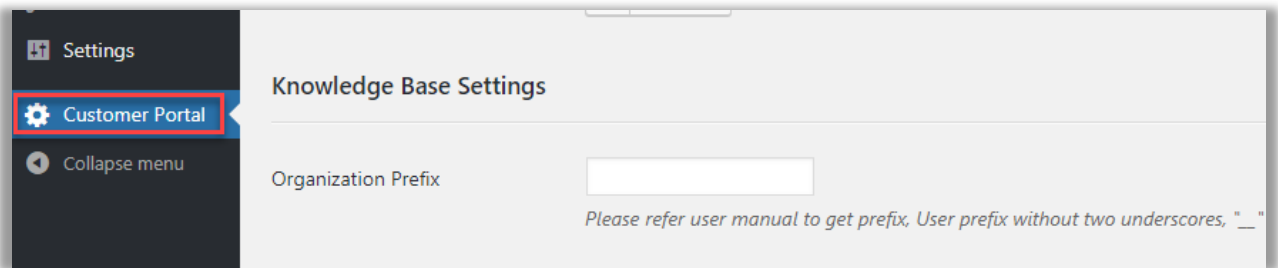
Uninstalled Packages

No uninstalled package data archives

Plug-in Configuration

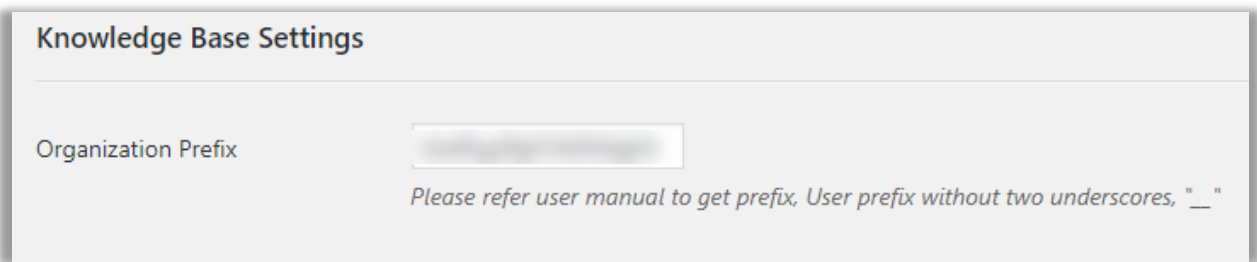
WordPress Configuration Settings

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

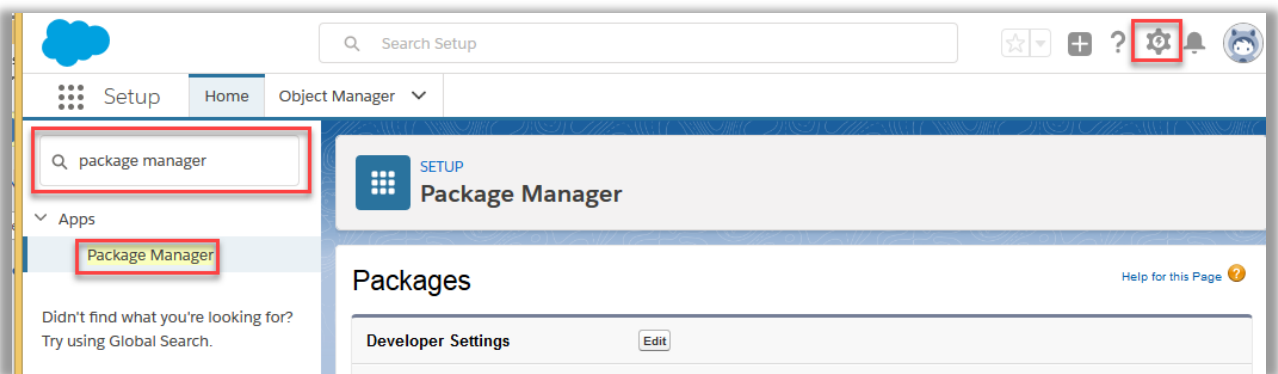


Organization Prefix:

- 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 Salesforce Package Manager interface. At the top, there is a 'SETUP Package Manager' header. Below this, the main heading is 'Packages' with a 'Help for this Page' link. The 'Developer Settings' section is highlighted, featuring an 'Edit' button. A text block explains that these settings determine package types and provides instructions to click 'Edit'. Below this is a table of settings:

| | | |
|------------------------------|-----------------------|---|
| 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? |

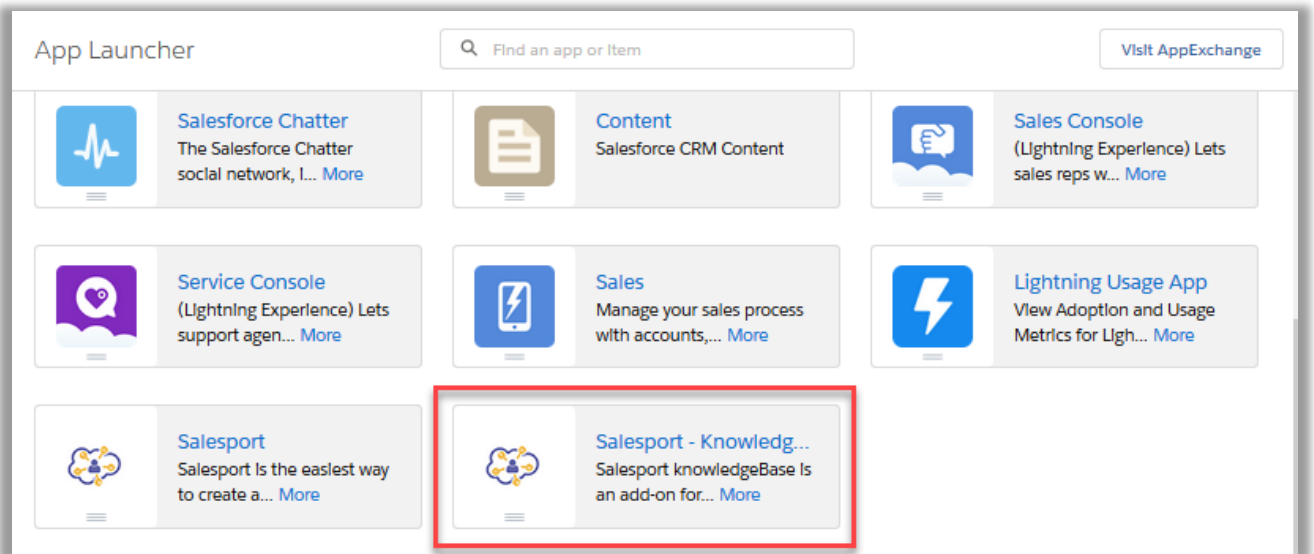
Below the settings is a 'Packages' section with a 'New' button. It contains a message: 'No Packages defined'.

- Add prefix from “Namespace Prefix”.

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

SalesPort - Knowledgebase Lightning App

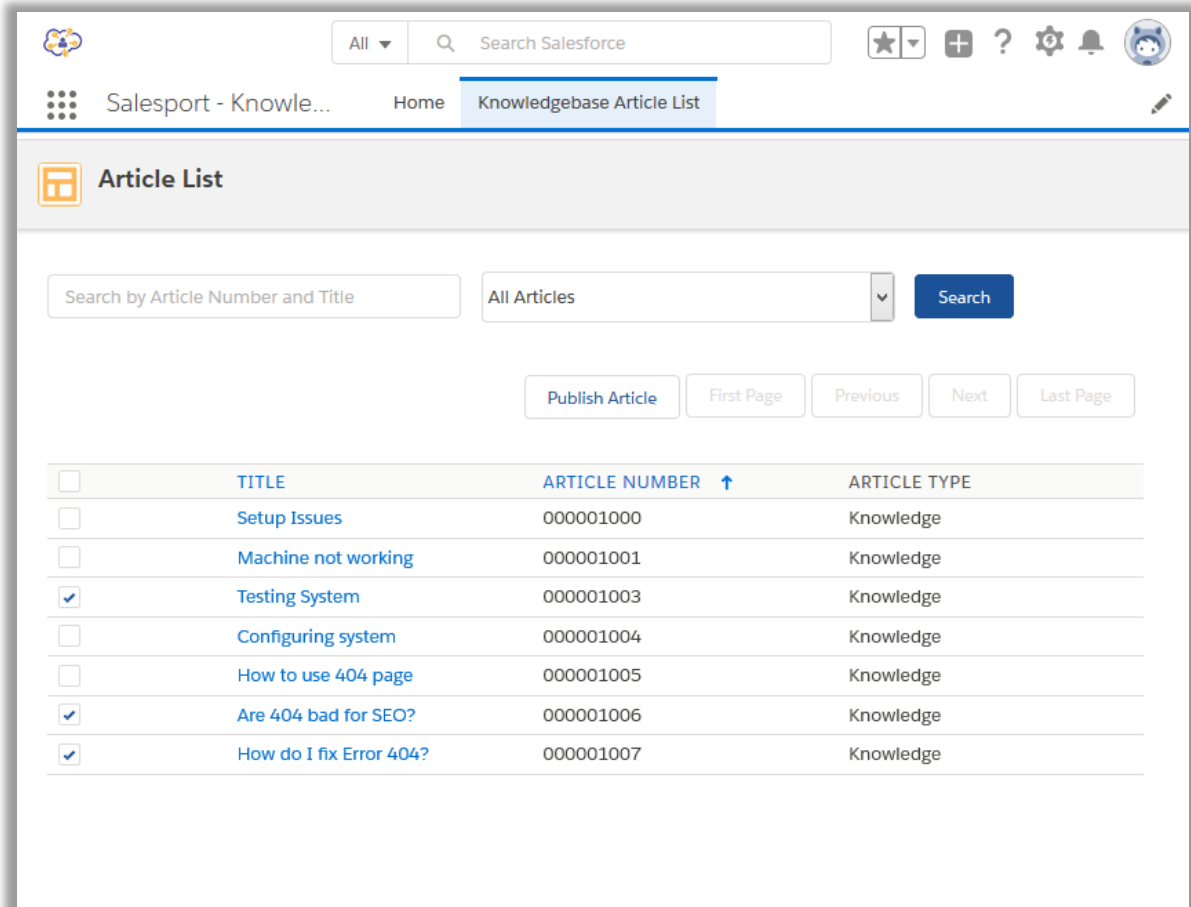
- SalesPort knowledgebase lightning app tab contains all configurations and settings related to knowledgebase add-on.



- For accessing lightning app, click on “App Launcher” 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 launcher”.
- You will get a list of Knowledgebase articles.



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

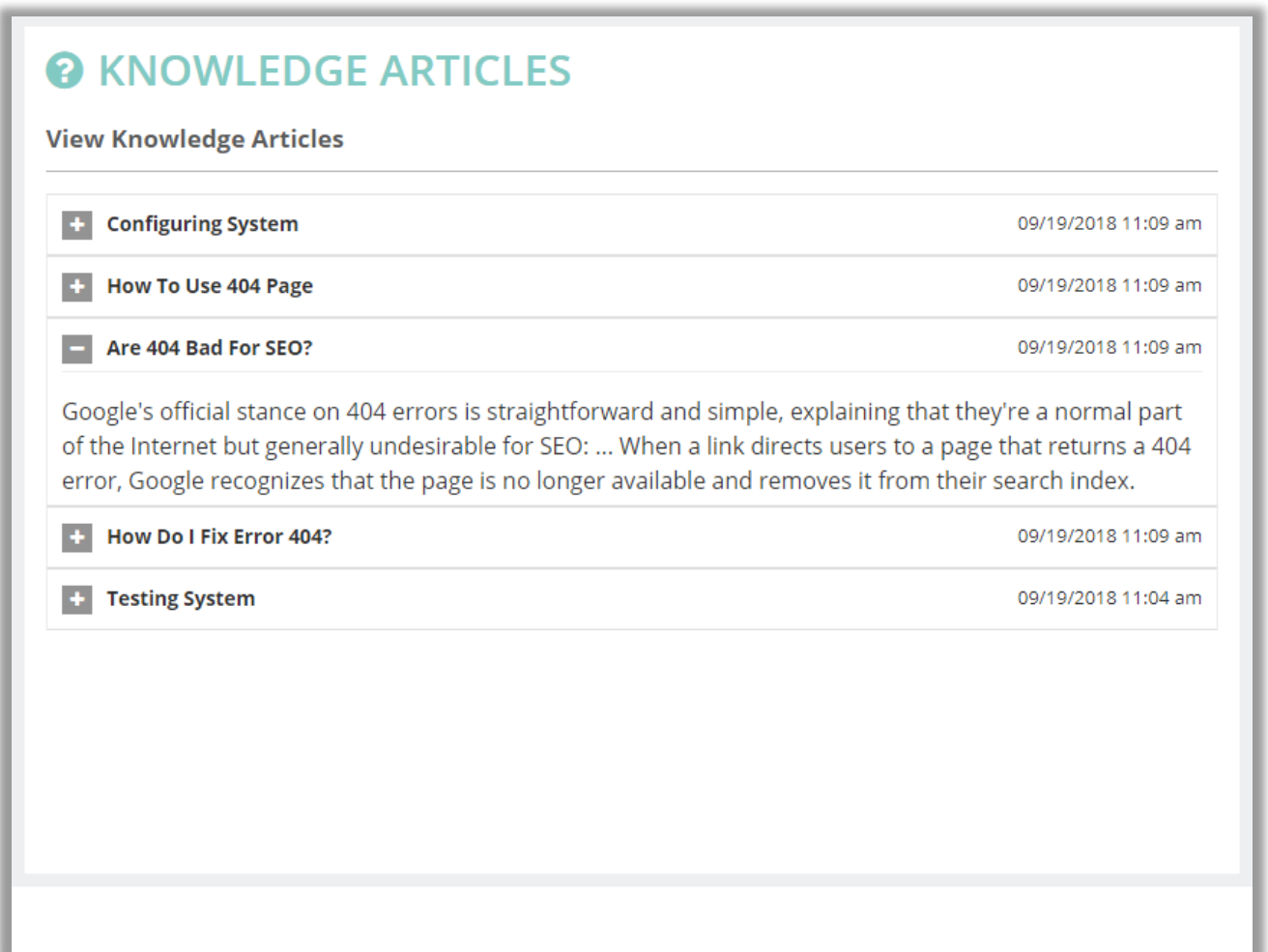
Note: Only published articles can be accessed from portal.

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 of a user interface. 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, each with a plus or minus icon, the article title, and a timestamp. The article 'Are 404 Bad For SEO?' is expanded, showing a detailed paragraph of text. The table contains the following data:

| Icon | 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 |

The expanded article 'Are 404 Bad For SEO?' contains the following text:

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 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.