

Installation Manual

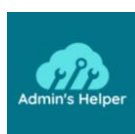
Knowledge Article | Any Object PDF

Version 4.4.0



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30-minute Setup Guarantee

We want to make the installation as easy as possible. If you have any issues installing or setting up the Package “Knowledge Article | Any Object PDF” don’t hesitate to write an email and we will come back as fast as possible. We only stop when you are up and running!

Calendly: <https://calendly.com/johannf/free-installation-service-30-minute-guarante-kap>

Email: johann@cloudjohann.com

Pre-Requisites:

Editions:

The App supports Enterprise Edition, Unlimited Edition, and Performance Edition.

Lightning Knowledge:

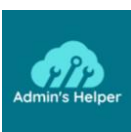
Lightning Knowledge needs to be activated. Please find details on how to activate Lightning Knowledge [here](#).

Salesforce Help & Training:

https://help.salesforce.com/articleView?id=sf.knowledge_lightning_enable.htm&type=5

Trailhead:

<https://trailhead.salesforce.com/en/content/learn/projects/build-a-community-withknowledge-and-chat/enable-and-configure-lightning-knowledge>



Installation

Get the AppExchange Package on AppExchange and Click “Get It Now”.

Select “Install for Admins only” and click “Install”.



Initial Setup

The fields displayed on the Page Layout are defined by a Field Set. The Field-Set is defined for the Knowledge or any other object itself. The Field Set needs to be created and must be called “Knowledge Article PDF Export Fields” or for any other object *[ObjectAPIName]_PDF_Export*.

Furthermore, the Button “Download PDF” needs to be added to the Object Page Layout.

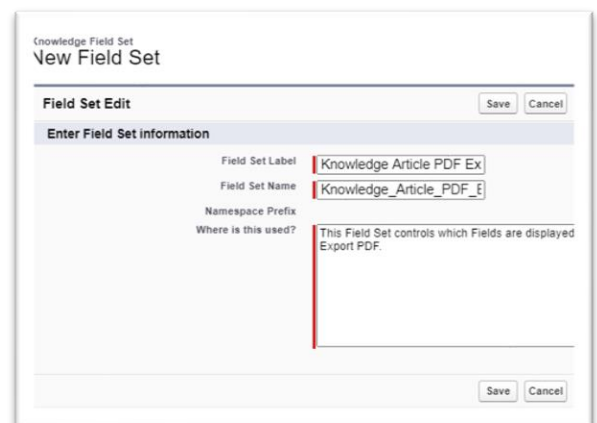
The installation manual explains the steps for Knowledge Articles but can be used for any other object as well.

Field Set

The Field Set controls the fields displayed in the PDF.

You can either use a default field set or Record Type specific field sets. The Button first checks for a Record Type specific field set, if no Record Type specific one is found get’s the default one.

1. Click “Setup”
2. Select “Object Manager”
3. Search for “Knowledge” and click on “Knowledge”
4. Click on “Field Set”



5. Create a Field Set. **Make sure the Field Set Label and Name are correct.** Easiest is to copy paste without the quotation marks.

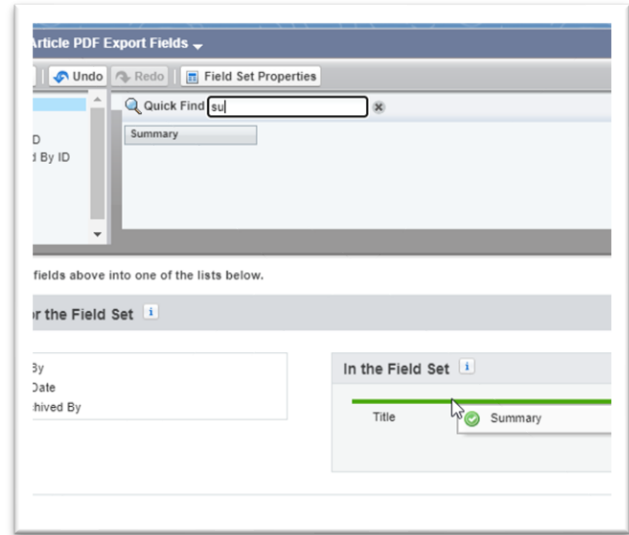
Default Field Set:

- a. Field Set Label and Field Set Name:
“Knowledge_Article_PDF_Export_Fields”
OR ***“[ObjectAPIName]_PDF_Export”*** for any other object. The **[ObjectAPIName]** has to be without “__c”. Example:
CustomObject__c becomes CustomObject_PDF_Export
- b. Description: “This Field Set controls which Fields are displayed in the Knowledge Article Export PDF.”

Record Type specific field set:

- a. Field Set Label and Field Set Name:
“KAE_RT_[Record Type API Name]” **Example:**
“KAE_RT_FAQ” OR
“[ObjectAPIName]_PDF_Export_[RecordTypeDeveloperName]” for any other object. The **[ObjectAPIName]** has to be without “__c”. Example:
CustomObject__c becomes CustomObject_PDF_Export_FAQ
- b. Description: “This Field Set controls which Fields are displayed in the Knowledge Article Export PDF for Record Type FAQ.”

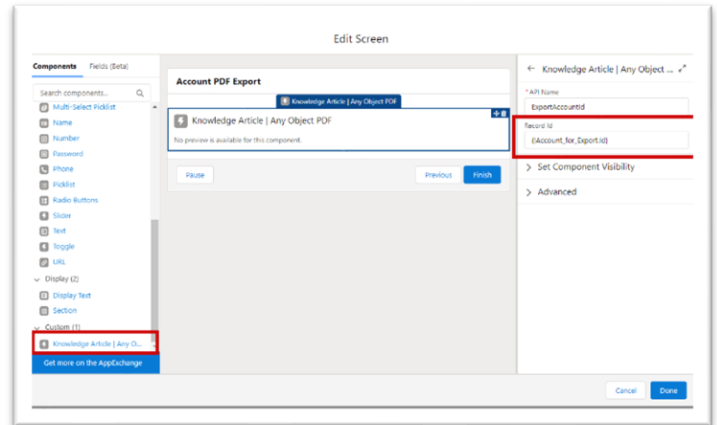
6. Click “Save
7. Add Fields you want to display in the PDF Export.
 - a. In order to hide Field Labels select the field as “Required”.
8. Click “Save”



Flow Component

You can download PDF documents directly from Flow Screen elements.

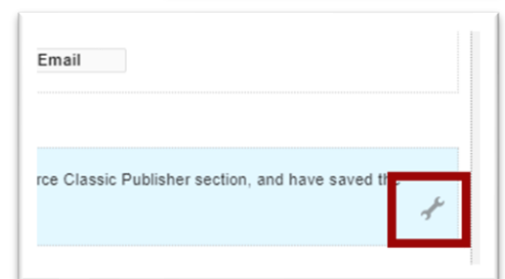
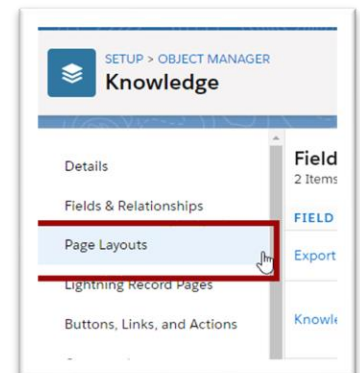
- 1) Add the component “Knowledge Article | Any Object PDF” to any Screen component
- 2) Pass the “Record Id” to the component.



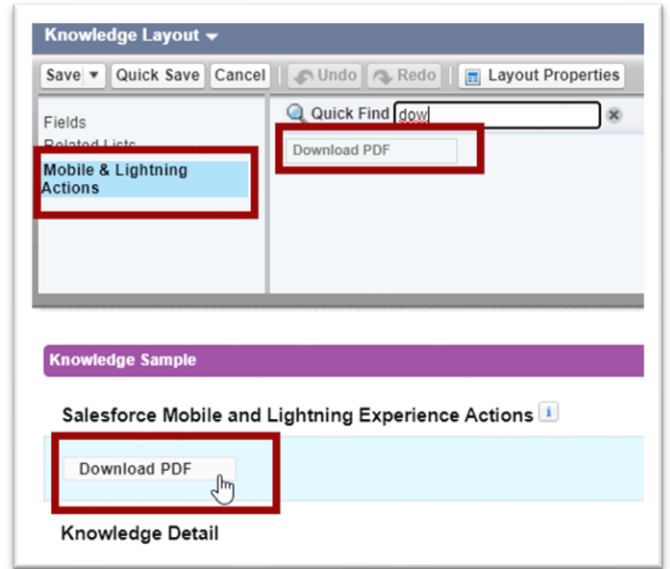
Button

In order to add a standard Salesforce Button to Knowledge Articles follow the following explanation. If you rather use a dedicated Lightning Component containing a Button especially in Experience (Communities) go to the next section.

1. Click “Setup”
2. Select “Object Manager”
3. Search for “Knowledge” and click on “Knowledge”
4. Go to “Page Layouts” and select the Page Layout you want to add the Button to.
5. If not done yet: Enable “Override customization” by clicking the wrench icon in the “Salesforce Mobile and Lightning Experience Actions”.
6. Select “Mobile & Lightning Actions”



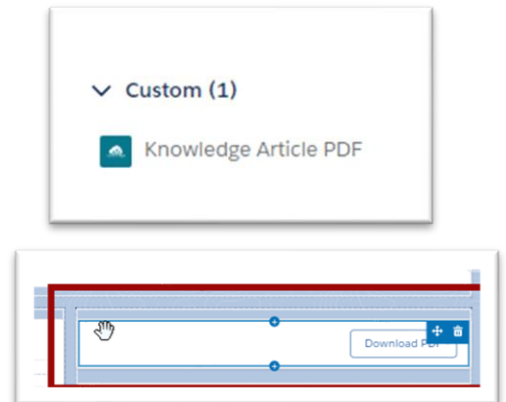
7. Search for the Action “Download PDF”
8. Drag&Drop the Button on “Salesforce Mobile and Lightning Experience Actions”
9. Click Save
10. Repeat last step for all Page Layouts you’d like to add the Button to.



Lightning Component

As an alternative to using a standard Button you can also add a Lightning Component which contains the button 'Download PDF'. Works on Lightning Record Pages and Experience Pages (Community).

1. Select a Knowledge Article
2. Click “Edit Page” on
3. Search for “Knowledge Article PDF” in the Components section
4. Drag and Drop the component to where you want to display the button.



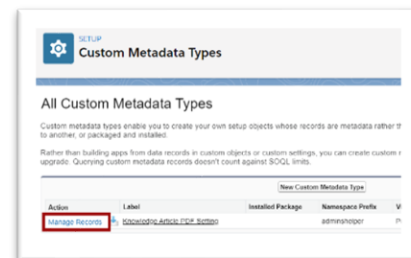
Page orientation, header and footer

The page orientation, header and footer of the PDF document can be defined in the Custom Metadata “Knowledge Article PDF Setting”. The fields “Header Center Text” and “Footer Center Text” can also be left empty. You can define the page orientation, a header and footer text.

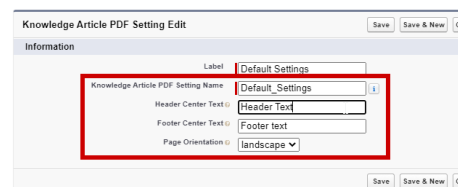
For any other object, follow the steps exactly the same way.

Text:

1. Go to Setup
2. Search for “Custom Metadata”
3. Click “Manage Records” next to “Knowledge Article PDF Setting”
4. Click “Default Settings”
5. Change the values for “Page Orientation”, “Header Center Text” and “Footer Center Text”
 - a. If you upgraded from a version older than 3.21 you have to add the field “Page Orientation” to the Metadata Page layout.
6. Click save



Knowledge Article PDF Setting



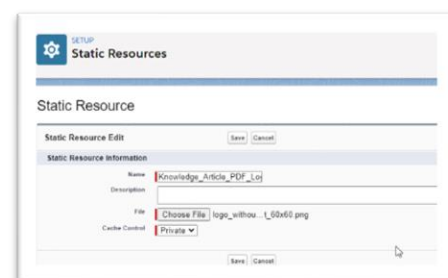
Logos

Logos are stored as static resources following a specific file format.

For any other object, follow the steps exactly the same way.

Logo:

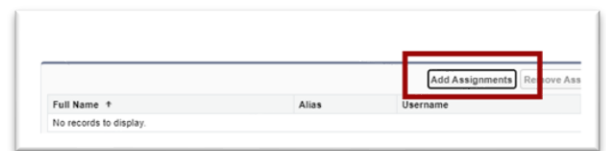
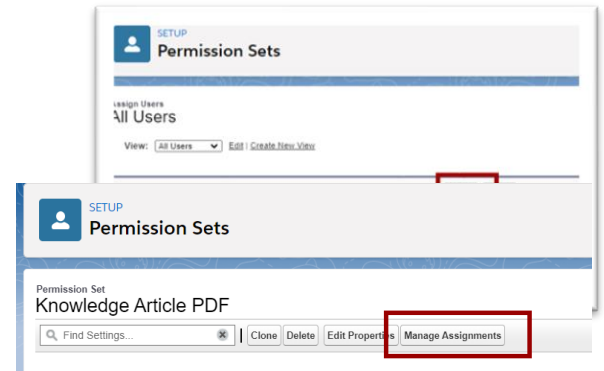
1. Go to Setup
2. Search for “Static Resources”
3. Click “New”
4. Name the Resource in the format of “Knowledge_Article_PDF_Logo_Top_Right”.
Logo Options include:
 - a. “Knowledge_Article_PDF_Logo_Top_Left”.
 - b. “Knowledge_Article_PDF_Logo_Top_Center”.
 - c. “Knowledge_Article_PDF_Logo_Top_Right”.
 - d. “Knowledge_Article_PDF_Logo_Footer_Center”.
5. Click “Choose File” and select your logo file (JPG, PNG)
6. Click “Save”



Permission Set

This Permission Set “Knowledge Article | Any Object PDF” controls the access to the Visualforce Page which is necessary for the Knowledge Article PDF Export. Assign the Permission Set to Users to allow the export of Knowledge Articles as PDF. System Administrators can use the App without Permission set.

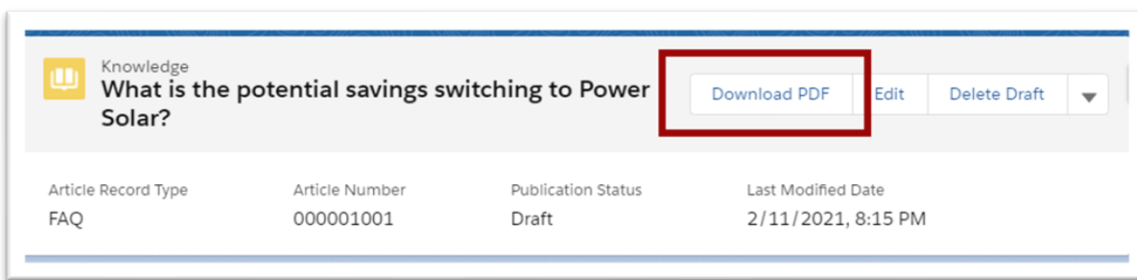
1. Click Setup -> Home
2. Search for “Permission Sets” and open Permission Sets
3. Select the Permission Set “*Knowledge Article | Any Object PDF*”.
4. Click “Manage Assignments”
5. Click “Add Assignments”
6. Select all the Users you want the App to be using and Click “Assign”
7. Check if all Users are assigned to Permission Set.



Test

After Set-Up is finished you should test if everything works as expected.

1. Select a Knowledge Article
2. Check if Button “Download PDF” is available on the Page Layout.
3. Click the “Download PDF” Button
4. A Pop-Up should open. After a few second the download of the PDF starts automatically
5. Open the PDF and check if the fields you selected are on the document.



Mass Export Articles as PDF

In order to export multiple Articles as once you can use the Tab “Knowledge Article PDF Mass Export”. As an Input you need to use a Report of the Primary Report Type “Knowledge Article Version” and the ID of the Article Version as the first Column.

For any other object, no special report type is needed.

Q report

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

Sales

Account Owner Report

Security

Account Owner Report

Didn't find what you're looking for? Try using Global Search.

Report Types

New Custom Report Type

Step 1: Define the Custom Report Type

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type. Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: Knowledge Article Version

Identification

Report Type Label: Knowledge Article Version

Report Type Name: Knowledge Article Version

Description: Knowledge Article Version

Store in Category: Opportunities

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: In Development

Deployed

Once you have the Report created, select the report in the search in the tab “Knowledge Article PDF Mass Export” and follow the apps instructions.

In case you have any issues or need help creating the custom Report Type, go ahead and let me know. I’m always happy for a chat.

Report: Knowledge Article Version

Published Articles

Total Records

12

	Knowledge Article Version ID	Title
1	ka03X000000F3pa	Email To Case Premium
2	ka03X000000OeHJ	FAQ
3	ka03X000000OeHT	fdsafds

Knowledge Article PDF - Mass Export

Search Knowledge Article Version Report

Pub

Published Articles

Published Articles

Report result

FAQ:

Hide Field Labels

In order to hide the Label of a field, select the field as “Required” in the Field Set.

Images or Text in Rich Text Field are truncated

In the case of an image being wider than the page, the image is truncated. If that happens text also overflows and looks truncated. As a workaround, you have to insert the images in a smaller size in the Rich-Text Field.

Change formatting of PDF

Layout Changes are currently not supported. Please let us know about changes in the Layout you’d like to have via email.

Salesforce Mobile App

The functionality is currently only supported on Desktop.

Videos

Videos embedded in Rich Text Fields are not shown.

Credits

Thanks goes to so many people who supported me. Three of them stood out:

[Eric Praud](#), Jakub Stefaniak, Andrew Russo and [Lawrence Newcombe](#).