



AC Knowledge Management Enterprise User Guide

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Overview

AC Knowledge Management Enterprise is a powerful solution designed to enhance how organizations manage and share Salesforce Knowledge Articles on the Experience Cloud.

It offers a robust user interface built on Experience Cloud, supporting full Salesforce Knowledge Base functionality including data categories, case deflection, file attachments, and customizable article views

Key Features



Navigation & Browsing

- Support for multiple knowledge bases
- Structured browsing and searchable articles
- Article type filters
- Data categories and group filters
- Custom article view layouts
- Category landing pages (in advanced navigation)
- Custom category labels
- Article sorting options (advanced navigation only)



Article Interaction

- File attachments support - standard and custom
- Two voting options: star rating or thumbs up/down
- Expandable and collapsible article detail sections
- Article subscription with user notifications
- Create articles directly from the site



Case Deflection

- Advanced case deflection engine
- Configurable question hierarchies
- Built-in case deflection analytics



Filtering & Customization

- Standard filtering with custom filters
- Advanced structured navigation (based on hierarchy of groups, categories, article titles, and anchor sections)



LLM Integration

- Integrate with LLMs (Large Language Models) for AI-powered search, Q&A, and article recommendations

★ Community Engagement

- Reputation points for article contributions
- Article feedback through voting and comments (optional)

Flexible Navigation Modes

The application can be configured and used in two different ways, depending on the selected Navigation component. AC Knowledge Management navigation can work as an articles filter by groups and categories or by structured content, which includes a hierarchy of groups, categories, article titles, and its sections/anchors.

Choose the navigation component suitable for the purpose of your Knowledge Base:

AC Knowledge Filters (standard filtering) can be used for Q&A or FAQ knowledge base. [Set up Knowledge Management with standard filtering](#)

AC Advanced Navigation is much more suitable for documentation and guides, where a clear order of articles is required. [Set up Knowledge Management with Advanced Navigation](#)

Features	Enterprise Knowledge with Standard Navigation Filters	Enterprise Knowledge with Advanced Navigation Menu
Filter articles by record type	✓	✗
Filter articles by Data Groups and Categories	✓	✗
Categories Hierarchy	✓	✓
Custom Category Labels	✓	✓

Articles Navigation	✗	✓
Articles' Sort Order	✗	✓
Clear and Strict Hierarchical Structure	✗	✓
Sticky Navigation	✗	✓
Suitable for Q&A and FAQ	✓	✗
Suitable for documentation and guides	✗	✓
LLM Support	✓	✓

AC Knowledge Management Enterprise components and features are completely flexible and can be fully customized and combined according to your needs.

The components are adapted to align with WCAG accessibility guidelines, ensuring a more inclusive experience for all users.

Please note, the component works with Lightning Knowledge only. It doesn't work with Classic Knowledge. You can find more information about the differences between Lightning Knowledge and Classic Knowledge here: <http://advancedcommunities.com/salesforce-lightning-knowledge-new-features/>

We provide a free community component for legacy Classic Knowledge that you can find on the AppExchange. Please note, we don't offer support for the Classic Knowledge component and recommend you move to Lightning Knowledge:
<https://appexchange.salesforce.com/appxListingDetail?listingId=a0N3A00000EpmKLUAZ>

Prerequisites

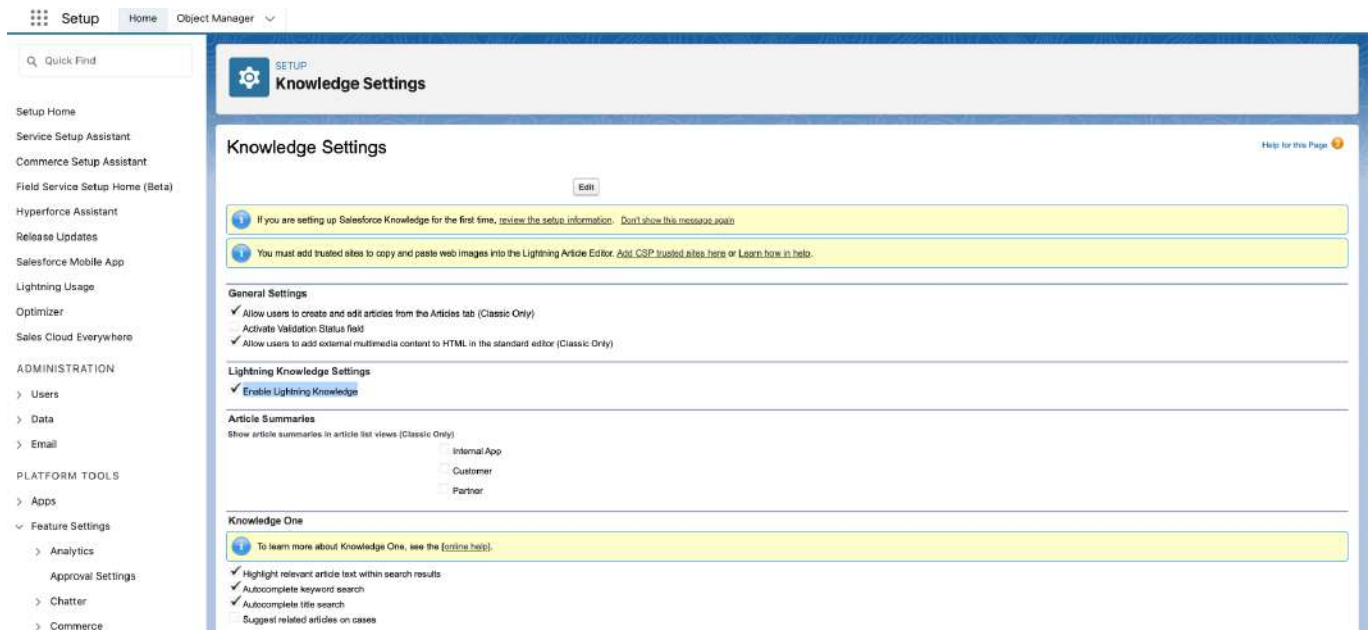
To start using Knowledge, follow the steps below to prepare your org or sandbox environment.

Step 1: Ensure that at least one user has a Knowledge User feature license assigned. On the user's profile, make sure the "Knowledge User" checkbox is enabled to allow article creation and management.

The screenshot shows the Salesforce Setup interface for a user named 'Sales User'. The left sidebar contains navigation links for Setup Home, Service Setup Assistant, Commerce Setup Assistant, Field Service Setup Home (Beta), Hyperforce Assistant, Release Updates, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The main content area displays the 'User Detail' for 'Sales User'. The user's email is sales@advancedcommunities.com, and their profile is 'Sales Sys Admin Profile'. The 'Knowledge User' checkbox is checked, indicating that the user is enabled for Knowledge article creation and management. Other checkboxes for roles like 'Marketing User', 'Offline User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', 'High-Contrast Palette on Charts', 'Load Lightning Pages While Scrolling', 'Send Apex Warning Email', 'Salesforce CRM Content User', and 'Receive Salesforce CRM Content Email Alerts' are also visible.

Role	Enabled
Salesforce	
User License	
Profile	Sales Sys Admin Profile
Active	☒
Marketing User	☒
Offline User	☐
Knowledge User	☒
Flow User	☐
Service Cloud User	☒
Site.com Contributor User	☐
Site.com Publisher User	☐
WDC User	☐
Mobile Push Registrations	☒
Data.com User Type	☐
Accessibility Mode (Classic Only)	☐
Debug Mode	☐
High-Contrast Palette on Charts	☐
Load Lightning Pages While Scrolling	☒
Send Apex Warning Email	☐
Salesforce CRM Content User	☒
Receive Salesforce CRM Content Email Alerts	☒

Step 2: Enable Salesforce Knowledge, and activate Lightning Knowledge in Setup – Knowledge settings.



Important: Once Lightning Knowledge is activated, it **cannot be disabled**. We strongly recommend performing all testing in a **sandbox environment** before enabling it in production.

Step 3: Make sure Digital Experiences (Experience Cloud) are enabled in your org.

Installation

To install **AC Knowledge Management Enterprise**, use the following AppExchange link:

[Install from AppExchange](#)

Note Salesforce AppExchange does **not support packaging Apex code** that references **Data Categories** directly. To enable Knowledge Category filtering, you must:

- Manually install an additional helper package
- Uncomment a specific block of code

Make sure you're using the latest version of the Knowledge Categories helper package:

Production environments: [Install package](#)

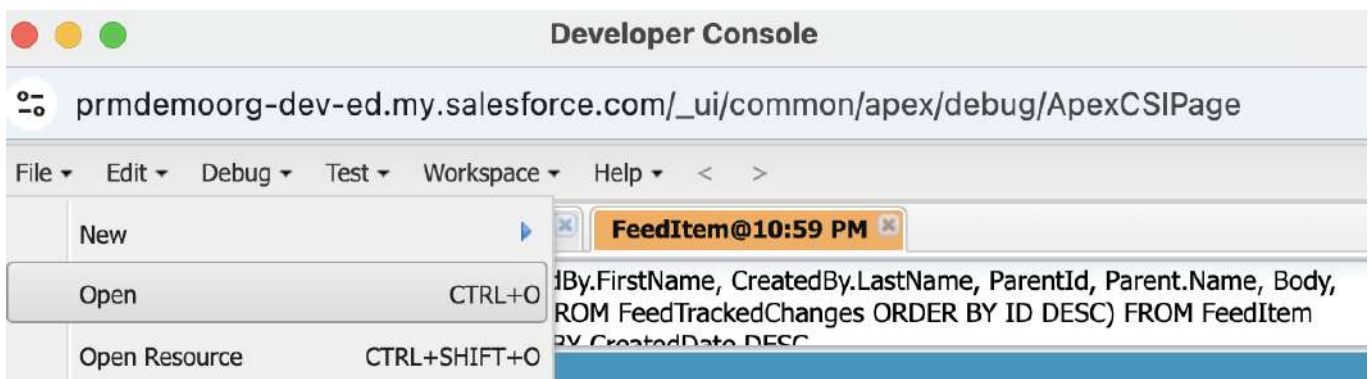
Sandbox environments: [Install package](#)

1. Install the Knowledge Categories Filter Package in both Production and Sandbox environments.
2. In your Sandbox, open `brKnowledgeDataCategoryUtilHelper` Apex Class via Developer Console and uncomment the code by removing all `/*` and `*/` marks:

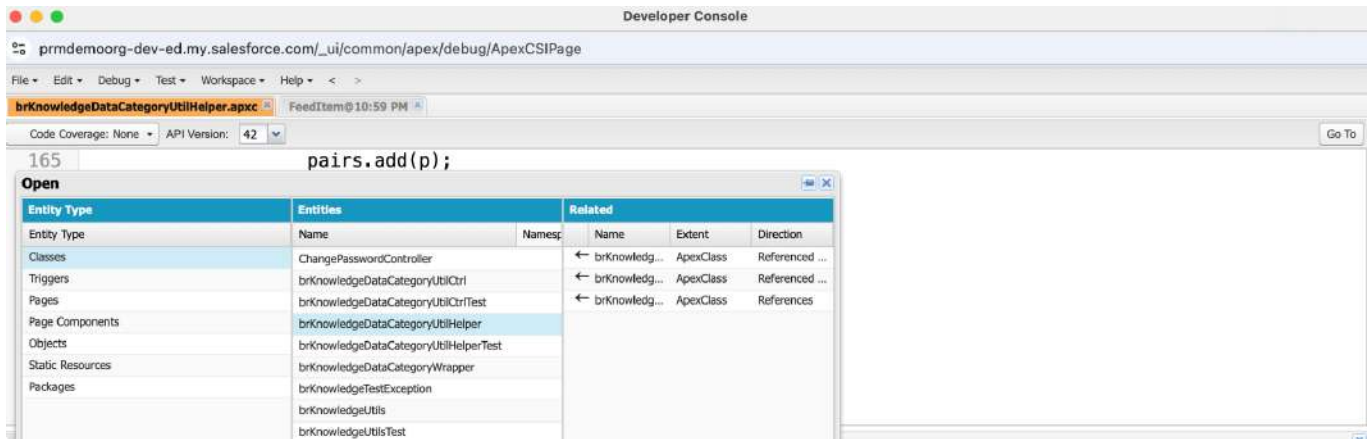
a. Open the Developer console.



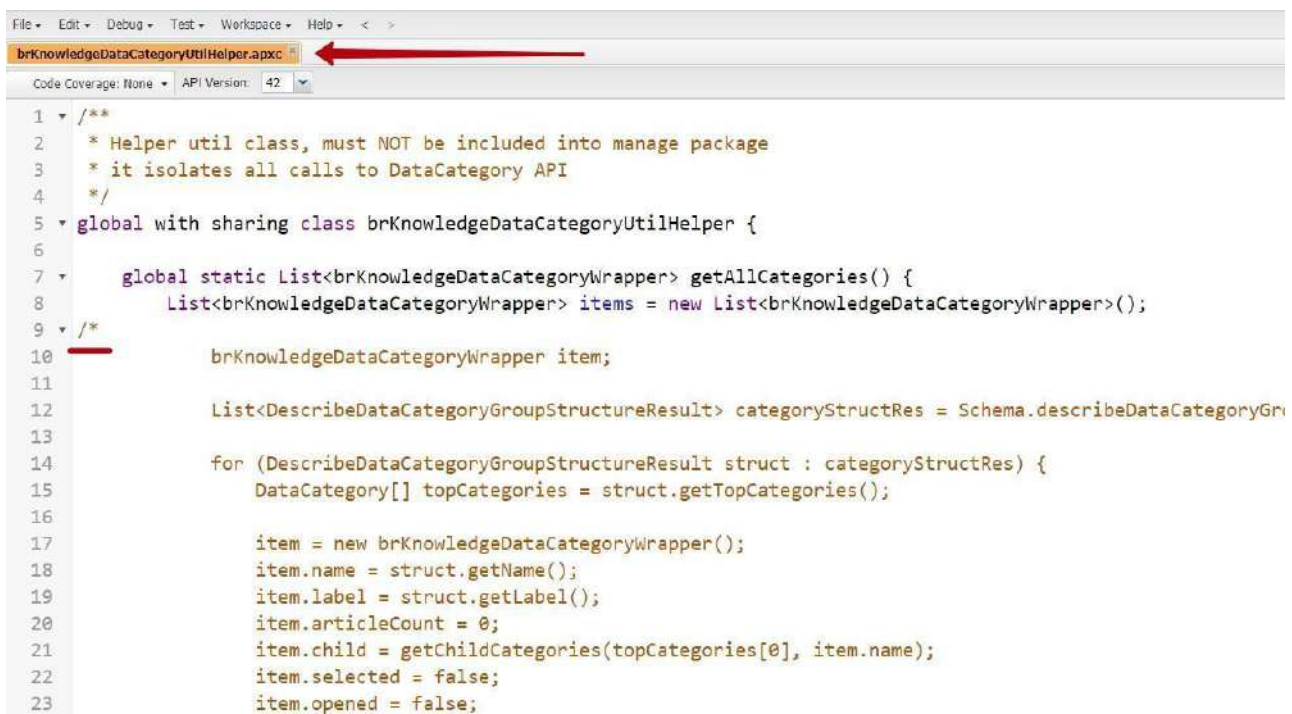
b. Go to File → Open.



c. In the new window, go to Classes, find `brKnowledgeDataCategoryUtilHelper` in the list of entities, and double-click it.



- d. In the opened class, you will find a block of commented code. Uncomment it by removing the `/*` and `*/` markers from the following lines: 15, 21, 35, 92, 131 and 174.



- e. Save your changes.

3. Deploy the following Apex classes to your Production environment using a Change Set:

brKnowledgeDataCategoryUtilHelper
brKnowledgeDataCategoryUtilHelperTest

See also: [Deploy Change Sets from Sandbox to Production](#).

If you need to reinstall the Knowledge Categories package, you must first uninstall the previous version from both Production and Sandbox environments. Then, repeat the installation and configuration steps outlined above.

Please note It is not possible to install the new package if a version is already installed in your organization.

Configuration

Set Up Permissions

AC Knowledge Management Enterprise package comes with custom objects and fields, and for the component to function correctly, you need to provide appropriate access to these objects and their fields.

We recommend using the permission sets provided in a package:

AC Knowledge Admins for admins or moderators

AC Knowledge Community Users for community users

AC Knowledge Users for guest users

Important Please note that you need to add access to the following objects/fields/apex manually for each permission set, due to Salesforce restrictions.

- Knowledge object and its fields including the fields created manually by you
- User feedback object and the new Article field
- Apex class: brKnowledgeDataCategoryUtilCtrl
- Standard Case object

Note Once you assign permission sets, please do not forget to provide access to standard objects manually, as well as admin permissions.

Important We advise assigning two permission sets: one from the package and another extended permission set with access to standard objects and fields.

Once the app is updated, permission sets in the package are automatically updated as well, eliminating the need for manual access adjustments.

You can also set up permissions manually, as shown below.

Object Permissions and Field-level Security

Custom Objects and Fields

Give users access to the custom objects. The table contains access provided in the permission sets.

Note Additionally to the custom objects, please do not forget to provide access to [standard objects and manually created fields](#).

Objects and Fields	Knowledge Admin	Knowledge User	Knowledge Guest
Knowledge	–	–	–
AC Knowledge Article Subscriptions	Read, Create, Edit, Delete	Read, Create, Edit, Delete	–
AC Knowledge Article Subscription Name	Read	Read	Read
Active	Read, Edit	Read, Edit	–
Community Id	Read, Edit	Read, Edit	–
Knowledge Article Id	Read, Edit	Read, Edit	–
User	Read, Edit	Read, Edit	–
Version Number	Read, Edit	Read, Edit	–
Knowledge Categories	Read, Create, Edit, Delete	Read	Read
Custom Label In Navigation	Read, Edit	Read	Read
Custom Landing Title	Read, Edit	Read	Read
Group With Category Item	Read, Edit	Read	Read
Knowledge Category Name	Read, Edit	Read, Edit	Read, Edit

Landing Content	Read, Edit	Read	Read
Show Landing Page	Read, Edit	Read	Read
User Feedback	Read, Create, Edit, Delete	Read, Create, Edit, Delete	–
Article Id	Read, Edit	Read, Edit	–
Other Reason	Read, Edit	Read, Edit	–
Reason	Read, Edit	Read, Edit	–
User	Read, Edit	Read, Edit	–
User Feedback Name	Read	Read	Read
Case Deflection Questions	Read, Create, Edit, Delete	Read	Read
Case Deflection Question Number	Read	Read	Read
Question	Read, Edit	Read	Read
Parent Question	Read, Edit	Read	Read
Sort Order	Read, Edit	Read	Read
Enable Case Create Button	Read, Edit	Read	Read
Message to show to the user	Read, Edit	Read	Read

Test Picklist	Read, Edit	–	–
Question Article Links	Read, Create, Edit, Delete	Read	Read
Knowledge Article Id	Read, Edit	Read	Read
Question	Read, Edit	Read	Read
Question Article Link Number	Read	Read	Read
CD Statistic Visits	Read, Create, Edit, Delete	Read, Create, Edit	Read, Create
Article closed	Read	–	–
Articles helped	Read	–	–
Articles not helped	Read	–	–
Articles viewed	Read	–	–
Case form opened	Read, Edit	Read, Edit	Read, Edit
Case form opened on question	Read, Edit	Read, Edit	Read, Edit
CD Statistic Visit Number	Read	Read	Read
Questions viewed	Read	–	–
URL	Read, Edit	Read, Edit	Read, Edit

CD Statistic Questions Tracking	Read, Create, Edit, Delete	Read, Create	Read, Create
CD Statistic Question Tracking Number	Read	Read	Read
Question	Read, Edit	Read, Edit	Read, Edit
Visit	Read, Edit	Read, Edit	Read, Edit
CD Statistic Articles Tracking	Read, Create, Edit, Delete	Read, Create, Edit	Read, Create
Article Title	Read, Edit	Read, Edit	Read, Edit
CD Statistic Article Tracking Number	Read	Read	Read
Knowledge Article Id	Read, Edit	Read, Edit	Read, Edit
Outcome	Read, Edit	Read, Edit	Read, Edit
Visit	Read, Edit	Read, Edit	Read, Edit
LLM Knowledge Export Links	Read, Create, Edit, Delete, View All Records, Modify All Records	Read, Create, Edit, Delete	Read
Status	Read, Edit	Read, Edit	Read
File Id	Read	Read	Read

Combined Group & Category Name	Read, Edit	Read, Edit	Read, Edit
LLM Knowledge Export	Read, Edit	Read, Edit	Read, Edit
LLM Mapping	Read, Edit	Read, Edit	Read
Vector Store ID	Read, Edit	Read, Edit	Read, Edit
LLM Mappings	Read, Create, Edit, Delete, View All Records	Read	–
Combined Group & Category Name	Read	Read	–
Data Category Group Name	Read, Edit	Read	–
Data Category Name	Read, Edit	Read	–
LLM Vector Storage	Read, Edit	Read, Edit	Read, Edit
LLM Logs	Read, Create, Edit, Delete, View All Records	Read, Create	Read, Create
Exception Message	Read, Edit	Read, Edit	Read, Edit
Request Data	Read, Edit	Read, Edit	Read, Edit
Response Data	Read, Edit	Read, Edit	Read, Edit
Type	Read, Edit	Read, Edit	Read, Edit

Sent via Email	Read, Edit	Read, Edit	Read, Edit
User	Read, Edit	Read, Edit	Read, Edit
LLM Conversation Settings	Read, Create, Edit, Delete, View All Records, Modify All Records	Read	Read
Custom Parameters (JSON)	Read, Edit	Read	Read
Enable Custom Parameters	Read, Edit	Read	Read
Instruction	Read, Edit	Read	Read
Model	Read, Edit	Read	Read
Output Verbosity	Read, Edit	Read	Read
Reasoning Effort	Read, Edit	Read	Read
Temperature	Read, Edit	Read	Read
LLM Messages	Read, Create, Edit, Delete, View All Records, Modify All Records	Read, Create	Read, Create
LLM Conversation	Read, Edit	Read, Edit	Read, Edit
Message	Read, Edit	Read, Edit	Read, Edit

LLM Conversation Ext ID	Read, Edit	Read, Edit	Read, Edit
LLM Conversations	Read, Create, Edit, Delete	Read, Create, Edit	Read, Create
Conversation Id	Read, Edit	Read, Edit	Read, Edit
SessionID	Read, Edit	Read, Edit	Read, Edit
Conversation Id	Read, Edit	Read, Edit	Read, Edit
LLM Conversation Feedbacks	Read, Create, Edit, Delete	Read, Create, Edit	Read, Create
LLM Conversation	Read, Edit	Read, Edit	Read, Edit
Feedback	Read, Edit	Read, Edit	Read, Edit
Rating	Read, Edit	Read, Edit	Read, Edit
LLM Vector Storages	Read, Create, Edit, Delete, View All Records, Modify All Records	Read	Read
Vector Storage Name	Read, Edit	Read, Edit	Read, Edit
Vector Storage Id	Read, Edit	Read	Read
Last Sync Run (acknowltnng__Last_Syn c_Run__c)	Read, Edit	Read	Read

Last Sync Run (acknowltng__Last_Sync_Run_ReadOnly__c)	Read	Read	Read
Sync Finished (acknowltng__Sync_Finished__c)	Read, Edit	Read	Read
Sync Finished (acknowltng__Sync_Finished_ReadOnly__c)	Read	Read	Read
LLM Conversation Cases	Read, Create, Edit, Delete, View All Records, Modify All Records	Read, Create, Edit, Delete	Read, Create
Case	Read, Edit	Read, Edit	Read, Edit
Case Title	Read	Read	Read
CaseRecordId	Read, Edit	Read, Edit	Read, Edit
LLM Conversation	Read, Edit	Read, Edit	Read, Edit
LLM Knowledge Exports	Read, Create, Edit, Delete, View All Records, Modify All Records	Read, Create, Edit, Delete	Read
File Id	Read, Edit	Read, Edit	Read
File Id Key	Read, Edit	Read, Edit	Read

Number of Links	Read	Read	Read
Parent Knowledge Article ID	Read, Edit	Read, Edit	Read
Parent Last Published Date	Read, Edit	Read, Edit	Read
Parent Title	Read, Edit	Read, Edit	Read
Status	Read, Edit	Read, Edit	Read
Vector Store Id	Read, Edit	Read, Edit	Read
Parent Id	Read, Edit	Read, Edit	Read
Parent Record Id	Read, Edit	Read, Edit	Read
Retry Number	Read, Edit	Read, Edit	Read
Parent Knowledge Export	Read, Edit	Read, Edit	Read
Type	Read	Read	Read

Standard Objects and Fields | Manually Created Fields

Give users access to the standard objects manually. The table contains access that was not provided in the permission sets due to Salesforce restrictions.

Additionally, the table includes access details for fields that you need to create manually.

Objects and Fields	Knowledge Admin	Knowledge User	Knowledge Guest
--------------------	-----------------	----------------	-----------------

Cases	Read, Create, Edit, Delete	Read, Create	Read, Create
Knowledge	Read, Create, Edit, Delete	Read, Create	Read
Article Body (manually created; or replace with your knowledge article fields)	Read, Edit	Read, Edit	Read
Enable Collapsible Sections (manually created)	Read, Edit	Read	Read
Navigation Title (manually created)	Read, Edit	Read	Read
Section Anchors (manually created)	Read, Edit	Read	Read
Sort Order in Category (manually created)	Read, Edit	Read	Read
Visible in Navigation (manually created)	Read, Edit	Read	Read
Upload to LLM (manually created)	Read, Edit	–	–
User Feedback	–	–	–
Article	Read, Edit	Read, Edit	–

AC Knowledge Article Subscriptions	–	–	–
Article	Read, Edit	Read, Edit	–
Question Article Links	–	–	–
Article	Read, Edit	Read	Read
User External Credentials	–	Read	Read

Apex Classes Access

The list contains access provided in the permission sets.

To set Apex class security manually, in the Apex Class Access page or related list, click Edit.

Select the Apex classes that you want to enable from the Available Apex Classes list and click Add.

- Provide access for **admin users** to the following Apex Classes:

brKnowledgeDataCategoryUtilCtrl (added manually)

acknowltnng.acArticleDetailFormCtrl
acknowltnng.acCreateArticleContainerCtrl
acknowltnng.acCreateArticleCtrl
acknowltnng.acFollowArticleChildCtrl
acknowltnng.acFollowArticleCtrl
acknowltnng.acFollowArticleListCtrl
acknowltnng.acKnowledgeCustomFiltersController
acknowltnng.acKnowledgeSettingsCtrl
acknowltnng.acStatisticsCtrl
acknowltnng.acStatisticsService
acknowltnng.ArticleDeletionFromOpenAIQueueable
acknowltnng.ArticleDeletionFromOpenAIService
acknowltnng.ArticleLinkedToOpenAIQueueableTest
acknowltnng.ArticleLinkedToOpenAISStorageQueueable
acknowltnng.ArticleLinkerToPlatformOpenAIService
acknowltnng.ArticleLinkWrapper
acknowltnng.ArticlesFactory
acknowltnng.ArticleUploaderToOpenAIQueueableTest
acknowltnng.ArticleUploaderToOpenAISchedulerTest
acknowltnng.ArticleUploaderToOpenAIServiceTest
acknowltnng.ArticleUploaderToPlatformOpenAIQueueable

acknowltng.ArticleUploaderToPlatformOpenAIScheduler
acknowltng.ArticleUploaderToPlatformOpenAIService
acknowltng.AsyncApexJobSelector
acknowltng.AttachmnetsUtils
acknowltng.AttachmnetsUtilsTest
acknowltng.BatchUtils
acknowltng.brCategoryController
acknowltng.brCategoryLandingCtrl
acknowltng.CaseDeflectionArticleInternalCtrl
acknowltng.CaseDeflectionQuestionCtrl
acknowltng.CleanupOpenAIPlatformHelper
acknowltng.CleanupOpenAIPlatformHelperTest
acknowltng.CleanupOpenAIPlatformQueueable
acknowltng.CleanupOpenAIPlatformQueueableTest
acknowltng.ClearKnowledgeExportBatch
acknowltng.ClearKnowledgeExportBatchTest
acknowltng.ContentDocumentLinkSelector
acknowltng.ContentDocumentLinkSelectorTest
acknowltng.ContentDocumentLinkTriggerHandler
acknowltng.ContentVersionSelector
acknowltng.ContractViolationException
acknowltng.CreateKnowledgeExportRecordsQueueable
acknowltng.CronTriggerSelector
acknowltng.DataConvertExtendUtils
acknowltng.DataConvertUtils
acknowltng.DeleteArticleFromPlatformOpenAiScheduler
acknowltng.DMLByIdsService
acknowltng.DMLFIsUtils
acknowltng.DMLProcessResultsUtils
acknowltng.DMLService
acknowltng.DMLServiceException
acknowltng.DMLUtils
acknowltng.FieldMappingService
acknowltng.HTTPMockFactory
acknowltng.HttpRequestException
acknowltng.IArticleDeletionFromOpenAIService
acknowltng.IArticleLinkerToPlatformOpenAIService
acknowltng.IArticleUploaderToPlatformOpenAIService
acknowltng.IContentDocumentLinkSelector
acknowltng.IFieldMappingService
acknowltng.IFieldMappingServiceMock
acknowltng.IKnowledgeArticleSelector
acknowltng.IKnowledgeArticleSelectorMock
acknowltng.IKnowledgeExportSelector
acknowltng.IKnowledgeExportService
acknowltng.ILLMMappingSelector
acknowltng.ILLMMappingService
acknowltng.ILLMVectorStorageSelector
acknowltng.IPlatformOpenAIApiService

acknowltng.IPlatformOpenAIApiServiceMock
acknowltng.IPlatformOpenAIAssistantSelector
acknowltng.IPlatformOpenAIChatApiService
acknowltng.IPlatformOpenAIConversationSelector
acknowltng.IPlatformOpenAIReadFilesApiService
acknowltng.IPlatformOpenAIService
acknowltng.JobManagerController
acknowltng.JobManagerControllerUtils
acknowltng.JobManagerSettingsSelector
acknowltng.KnowledgeAdvancedNavigationCtrl
acknowltng.KnowledgeArticleAdditionalInfoCtrl
acknowltng.KnowledgeArticleBodyCtrl
acknowltng.KnowledgeArticleItemController
acknowltng.KnowledgeArticleListController
acknowltng.KnowledgeArticleSelector
acknowltng.KnowledgeArticleVotingController
acknowltng.KnowledgeArticleWrapper
acknowltng.KnowledgeBreadcrumbsCtrl
acknowltng.KnowledgeChatterFilesCtrl
acknowltng.KnowledgeController
acknowltng.KnowledgeExportReadyToDeleteBatch
acknowltng.KnowledgeExportSelector
acknowltng.KnowledgeExportSelectorTest
acknowltng.KnowledgeExportService
acknowltng.KnowledgeHelper
acknowltng.KnowledgeInstallHandler
acknowltng.KnowledgeSettingsCtrl
acknowltng.KnowledgeSidebarController
acknowltng.LLMLogSendBatch
acknowltng.LLMLogSendBatchTest
acknowltng.LLMLogsSelector
acknowltng.LLMLogsSendAndDeleteScheduler
acknowltng.LLMLogsSendAndDeleteSchedulerTest
acknowltng.LLMMappingContainerController
acknowltng.LLMMappingManagementController
acknowltng.LLMMappingSelector
acknowltng.LLMMappingService
acknowltng.LLMProcessingUtils
acknowltng.LLMTestDataFactory
acknowltng.LLMVectorStorageController
acknowltng.LLMVectorStoragePicklist
acknowltng.LLMVectorStorageSelector
acknowltng.LogService
acknowltng.MockKnowledgeExportSelector
acknowltng.PermissionSetAssignmentSelector
acknowltng.PlatformOpenAIApiService
acknowltng.PlatformOpenAIApiServiceTest
acknowltng.PlatformOpenAIAssistantPicklist
acknowltng.PlatformOpenAIAssistantSelector

acknowltnng.PlatformOpenAIAssistantSelectorTest
acknowltnng.PlatformOpenAIChatApiService
acknowltnng.PlatformOpenAIChatUtils
acknowltnng.PlatformOpenAIController
acknowltnng.PlatformOpenAIControllerTest
acknowltnng.PlatformOpenAIConversationHelper
acknowltnng.PlatformOpenAIConversationSelector
acknowltnng.PlatformOpenAIConversationService
acknowltnng.PlatformOpenAILogEventTriggerHandler
acknowltnng.PlatformOpenAIReadFilesApiService
acknowltnng.PlatformOpenAIReadFilesApiServiceTest
acknowltnng.PlatformOpenAIService
acknowltnng.PlatformOpenAIServiceTest
acknowltnng.PlatformOpenAIUtils
acknowltnng.PlatformOpenAIUtilsTest
acknowltnng.QuestionArticleLinkTriggerHandler
acknowltnng.RepublishingArticlesBatch
acknowltnng.RepublishingArticlesBatchTest
acknowltnng.RetryKnowledgeExportBatch
acknowltnng.RetryKnowledgeExportBatchTest
acknowltnng.ValidateLlmSettingsController

- Provide access for **external users** to the following Apex Classes:

brKnowledgeDataCategoryUtilCtrl (**added manually**)
acknowltnng.acArticleDetailFormCtrl
acknowltnng.acCreateArticleContainerCtrl
acknowltnng.acCreateArticleCtrl
acknowltnng.acFollowArticleChildCtrl
acknowltnng.acFollowArticleCtrl
acknowltnng.acFollowArticleListCtrl
acknowltnng.acKnowledgeCustomFiltersController
acknowltnng.acStatisticsCtrl
acknowltnng.acStatisticsService
acknowltnng.AsyncApexJobSelector
acknowltnng.AttachmnetsUtils
acknowltnng.BatchUtils
acknowltnng.brCategoryController
acknowltnng.brCategoryLandingCtrl
acknowltnng.CaseDeflectionQuestionCtrl
acknowltnng.ContentDocumentLinkSelector
acknowltnng.ContentDocumentLinkTriggerHandler
acknowltnng.ContentDocumentLinkTriggerHandlerTest
acknowltnng.ContentVersionSelector
acknowltnng.DataConvertExtendUtils
acknowltnng.DataConvertUtils
acknowltnng.DMLByIdsService
acknowltnng.DMLFIsUtils
acknowltnng.DMLProcessResultsUtils

acknowltng.DMLService
acknowltng.DMLServiceException
acknowltng.DMLUtils
acknowltng.FieldMappingService
acknowltng.HttpRequestException
acknowltng.IArticleDeletionFromOpenAIService
acknowltng.IArticleLinkerToPlatformOpenAIService
acknowltng.IArticleUploaderToPlatformOpenAIService
acknowltng.IContentDocumentLinkSelector
acknowltng.IFieldMappingService
acknowltng.IFieldMappingServiceMock
acknowltng.IKnowledgeArticleSelector
acknowltng.IKnowledgeArticleSelectorMock
acknowltng.IKnowledgeExportSelector
acknowltng.IKnowledgeExportService
acknowltng.ILLMMMappingSelector
acknowltng.ILLMMMappingService
acknowltng.ILLMVectorStorageSelector
acknowltng.IPlatformOpenAIApiService
acknowltng.IPlatformOpenAIApiServiceMock
acknowltng.IPlatformOpenAIAssistantSelector
acknowltng.IPlatformOpenAIChatApiService
acknowltng.IPlatformOpenAIConversationSelector
acknowltng.IPlatformOpenAIReadFilesApiService
acknowltng.IPlatformOpenAIService
acknowltng.JobManagerController
acknowltng.JobManagerControllerUtils
acknowltng.JobManagerSettingsSelector
acknowltng.KnowledgeAdvancedNavigationCtrl
acknowltng.KnowledgeArticleAdditionalInfoCtrl
acknowltng.KnowledgeArticleBodyCtrl
acknowltng.KnowledgeArticleItemController
acknowltng.KnowledgeArticleListController
acknowltng.KnowledgeArticleSelector
acknowltng.KnowledgeArticleVotingController
acknowltng.KnowledgeArticleWrapper
acknowltng.KnowledgeBreadcrumbsCtrl
acknowltng.KnowledgeChatterFilesCtrl
acknowltng.KnowledgeExportSelector
acknowltng.KnowledgeSettingsCtrl
acknowltng.KnowledgeSidebarController
acknowltng.LLMLogsSelector
acknowltng.LLMMappingSelector
acknowltng.LLMMappingService
acknowltng.LLMProcessingUtils
acknowltng.LLMVectorStorageController
acknowltng.LLMVectorStoragePicklist
acknowltng.LLMVectorStorageSelector
acknowltng.LogService

acknowltnng.PermissionSetAssignmentSelector
acknowltnng.PlatformOpenAIApiService
acknowltnng.PlatformOpenAIAssistantPicklist
acknowltnng.PlatformOpenAIAssistantSelector
acknowltnng.PlatformOpenAIChatApiService
acknowltnng.PlatformOpenAIChatUtils
acknowltnng.PlatformOpenAIController
acknowltnng.PlatformOpenAIConversationService
acknowltnng.PlatformOpenAIConversationHelper
acknowltnng.PlatformOpenAILogEventTriggerHandler
acknowltnng.PlatformOpenAIReadFilesApiService
acknowltnng.PlatformOpenAIService
acknowltnng.PlatformOpenAIUtils
acknowltnng.QuestionArticleLinkTriggerHandler

- Provide access for **guest users** to the following Apex Classes:

brKnowledgeDataCategoryUtilCtrl (added manually)

acknowltnng.acCreateArticleCtrl
acknowltnng.acFollowArticleChildCtrl
acknowltnng.acFollowArticleCtrl
acknowltnng.acFollowArticleListCtrl
acknowltnng.acKnowledgeCustomFiltersController
acknowltnng.acStatisticsCtrl
acknowltnng.acStatisticsService
acknowltnng.AttachmnetsUtils
acknowltnng.brCategoryController
acknowltnng.brCategoryLandingCtrl
acknowltnng.CaseDeflectionQuestionCtrl
acknowltnng.ContentDocumentLinkSelector
acknowltnng.ContentDocumentLinkTriggerHandler
acknowltnng.ContentVersionSelector
acknowltnng.DataConvertExtendUtils
acknowltnng.DataConvertUtils
acknowltnng.DMLByIdsService
acknowltnng.DMLFIsUtils
acknowltnng.DMLProcessResultsUtils
acknowltnng.DMLService
acknowltnng.DMLServiceException
acknowltnng.DMLUtils
acknowltnng.FieldMappingService
acknowltnng.HttpRequestException
acknowltnng.IArticleDeletionFromOpenAIService
acknowltnng.IArticleLinkerToPlatformOpenAIService
acknowltnng.IArticleUploaderToPlatformOpenAIService
acknowltnng.IContentDocumentLinkSelector
acknowltnng.IFieldMappingService
acknowltnng.IFieldMappingServiceMock
acknowltnng.IKnowledgeArticleSelector

acknowltng.IKnowledgeArticleSelectorMock
acknowltng.IKnowledgeExportSelector
acknowltng.IKnowledgeExportService
acknowltng.ILLMMMappingSelector
acknowltng.ILLMMMappingService
acknowltng.ILLMVectorStorageSelector
acknowltng.IPlatformOpenAIApiService
acknowltng.IPlatformOpenAIApiServiceMock
acknowltng.IPlatformOpenAIAssistantSelector
acknowltng.IPlatformOpenAIChatApiService
acknowltng.IPlatformOpenAIConversationSelector
acknowltng.IPlatformOpenAIService
acknowltng.KnowledgeAdvancedNavigationCtrl
acknowltng.KnowledgeArticleAdditionalInfoCtrl
acknowltng.KnowledgeArticleBodyCtrl
acknowltng.KnowledgeArticleItemController
acknowltng.KnowledgeArticleListController
acknowltng.KnowledgeArticleSelector
acknowltng.KnowledgeBreadcrumbsCtrl
acknowltng.KnowledgeChatterFilesCtrl
acknowltng.KnowledgeExportSelector
acknowltng.KnowledgeSettingsCtrl
acknowltng.KnowledgeSidebarController
acknowltng.LLMLogsSelector
acknowltng.LLMMappingSelector
acknowltng.LLMMappingService
acknowltng.LLMProcessingUtils
acknowltng.LLMVectorStoragePicklist
acknowltng.LLMVectorStorageSelector
acknowltng.LogService
acknowltng.PermissionSetAssignmentSelector
acknowltng.PlatformOpenAIApiService
acknowltng.PlatformOpenAIAssistantPicklist
acknowltng.PlatformOpenAIAssistantSelector
acknowltng.PlatformOpenAIChatApiService
acknowltng.PlatformOpenAIChatUtils
acknowltng.PlatformOpenAIChatUtilsHelper
acknowltng.PlatformOpenAIController
acknowltng.PlatformOpenAIConversationService
acknowltng.PlatformOpenAILogEventTriggerHandler
acknowltng.PlatformOpenAIReadFilesApiService
acknowltng.PlatformOpenAIService
acknowltng.PlatformOpenAIUtils
acknowltng.QuestionArticleLinkTriggerHandler

Flow Access

The list contains access provided in the permission sets.

To set Flow access manually, go to Setup - Permission set and select a profile.

In the Flow Access page or related list, click Edit.

Select the flows that you want to enable from the Available Flows list and click Add.

For admin users:

- AC Create Case From AI Chat - Default On

For external or guest users:

- AC Create Case From AI Chat - Default On

Assigned Apps

Admins: AC Knowledge Classic - visible

Admins: AC Knowledge Lightning - visible

Tab settings

Admins:

Knowledge (**add manually to the AC Knowledge app!**) - Default On

Knowledge Settings - Default On

Knowledge Categories - Default On

AC Knowledge Article Subscriptions - Default On

Case Deflection Questions - Default On

Questions Article Links - Default On

CD Statistics Visits - Default On

CD Statistics Questions Tracking - Default On

CD Statistics Articles Tracking - Default On

LLM Conversation Settings - Default On

LLM Knowledge Exports - Default On

LLM Conversations - Default On

LLM Message - Default On

LLM Knowledge Export Links - Default On

LLM Logs - Default On

LLM Vector Storages - Default On

Jobs Manager - Default On

Sharing Settings

Organization-Wide Defaults (Default External Access):

Knowledge – Read Only

AC Knowledge Article Subscription – Private

Case Deflection Question – Public Read Only

CD Statistic Visit – Private

Knowledge Category – Public Read Only
Question Article Link – Public Read Only

LLM Assistant Setting - Public Read Only
LLM Conversation - Public Read Only
LLM Conversation Case - Public Read Only
LLM Conversation Feedback - Public Read/Write
LLM Knowledge Export - Public Read Only
LLM Knowledge Export Link - Controlled by Parent
LLM Log - Public Read/Write
LLM Mapping - Controlled by Parent
LLM Message - Private
LLM Vector Storage - Public Read Only

Custom Setting Definitions

Enabled by default AC Admin, Community, and Guest permission sets.

AC Lightning Knowledge uses Custom Setting Definitions. To make this data visible for **admins**, **community users** and **guest users**, provide them with read access to the following custom settings:

AC Knowledge Settings

Only users with Customize Application permission can provide access to custom settings.

To grant a specific profile or permission set read access to custom settings:

1. Search for Profiles or Permission Sets from Setup, then click the name of the profile or permission set.
2. Click the **Custom Setting Definitions** permission.
3. Click “Edit”, add the custom setting to the Enabled Custom Setting Definitions list, then click “Save”.

Profile: **Customer Community Plus User**

Find Settings... Clone Edit Properties

Profile Overview > Custom Setting Definitions

Custom Setting Definitions Save Cancel

Available Custom Setting Definitions

- acblb.Blog Settings
- acideas.Ideas Common Settings
- acideas.Ideas Zone Settings
- bre.BrEvents Settings
- brgdp.GDPR Settings
- brgdp.Legal document settings
- brgdp.MC Settings
- brgdp.SF-MC Fields mapping
- gallerydev.Gallery Settings
- partdir_mp.Partner Details Setting

Add Remove

Enabled Custom Setting Definitions

- acknowledging AC Knowledge Settings

Org Settings

For the custom components to function correctly, please make sure to enable the “Use Lightning Web Security for Lightning web components and Aura web components” checkbox in Setup – Session Settings – Lightning Web Security.

Guest User Access

To improve data security for orgs with guest users, Salesforce enabled the “Secure Guest User Record Access” setting (Setup - Sharing Settings - Other Settings). Default value – On.

Other Settings

Manager Groups ☒

Use person role for first user in community account ☐

Grant community users access to related cases ☒

Secure guest user record access ☒

1. To configure Guest User access to Case Deflection records, create Sharing Rules (Setup - Sharing Settings) for the following objects:

- Case Deflection Question
- CD Statistic Visit
- Question Article Link

Step 1: Rule Name

Label

Rule Name

Description

Step 2: Select your rule type

Rule Type ☐ Based on record owner ☐ Based on criteria ☒ Guest user access, based on criteria

Step 3: Select which records to be shared

By modifying the default settings in accordance with these criteria, you are allowing immediate and unlimited credentials. To secure your community for guest users, consider all the use cases and implications and impact of your data to unauthenticated users related to this change from default settings.

Criteria	Field	Operator	Value	
	Owner ID	not equal to	0054H000005eDcn	AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		AND
	--None--	--None--		

[Add Filter Logic...](#)

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

If you need to share all records, you can set the criteria where the records' Owner ID is not equal to some inactive or guest user ID.

2. CD Statistic Visit is a master record for the following objects' records:

- CD Statistic Article Tracking
- CD Statistic Question Tracking

Select the minimum access level (Read Only - the max level of access for guest users) required on the Master record to create, edit, or delete related Detail records.

Go to Setup - Object Manager - CD Statistic Article Tracking/CD Statistic Question Tracking - Fields & Relationships - **edit** the "Visit" field - select "Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records" option - click Save.

SETUP > OBJECT MANAGER
CD Statistic Question Tracking

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Search Layouts for Salesforce Classic
Triggers
Validation Rules

Custom Field Definition Edit [Save] [Cancel]

Field Information

Field Label Visit Data Type Master-Detail

Field Name Visit

Namespace Prefix acknowledg

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

Master-Detail Options

Related To CD Statistic Visit Child Relationship Name CDStatisticQuestionsTrackin

Related List Label CD Statistic Questions Track

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

☒ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

☐ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting ☐ Child records can be reparented to other parent records after they are created

3. To configure guest user access to your knowledge categories in Advanced Navigation, create a sharing rule (Setup - Sharing Settings) for the Knowledge Category object:
4. To configure guest user access to your knowledge articles, create a sharing rule (Setup - Sharing Settings) for the **Knowledge** object. Set the rule criteria as: Owner ≠ Null (Owner is not equal to blank).

- To configure guest user access for your [LLM Integration](#) (if you choose to use this feature), follow the steps outlined in the [Guest User Access for Chat](#).

Page Layout Assignments

The following page layouts are automatically assigned to admin users during app installation.

If needed, you can manually assign these layouts to other profiles—see the instructions below for guidance.

Object: LLM Conversation

Assign the “Platform OpenAI Conversation Layout” page layout to the needed profiles (System Admin) through Setup - Object Manager - LLM Conversation - Page Layout - Page Layout Assignment.

LLM Conversation Detail

Standard Buttons

Edit

Delete

Clone

Change Owner

Change Record Type

Printable View

Sharing

Sharing Hierarchy

Edit Labels

Custom Buttons

Information (Header visible on edit only)

🔑

Conversation Number

GEN-2004-001234

★

Conversation Setting Id

Sample Text

★

Conversation Id

Sample Text

System Information (Header visible on edit only)

👤

Created By

Sample Text

🕒

Last Modified By

Sample Text

Custom Links (Header visible on edit only)

Related Lists

🔍

LLM Conversation Feedbacks

New

Change Owner

Name	Rating	Feedback	Created By
Sample Text	81	Sample Text	Sarah Sample

🔍

LLM Messages (LLM Conversation)

Name	Created By	Created Date 🕒	Message
Sample Text	Sarah Sample	11/14/2025, 12:37 AM	Sample Text

🔍

LLM Conversation Cases

Case	Case Title	Created By	Created Date 🕒
GEN-2004-001234	Sample Text	Sarah Sample	11/14/2025, 12:37 AM

Object: LLM Conversation Setting

Assign the “Platform OpenAI Assistant Layout” page layout to the needed profiles (System Admin) through Setup - Object Manager - LLM Conversation Setting - Page Layout - Page Layout Assignment.

LLM Conversation Setting Detail

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit Labels

Custom Buttons

Information (Header visible on edit only)

Conversation Setting Name

Sample Text

Model

Sample Text

Temperature

0.60

Reasoning Effort

Sample Text

Output Verbosity

Sample Text

Remove

Instruction

Instruction

Sample Text

Extended Params

Enable Custom Parameters

✓

Custom Parameters (JSON)

Sample Text

System Information

Created By

Sample Text

Owner

Sample Text

Last Modified By

Sample Text

Custom Links (Header visible on edit only)

Object: LLM Knowledge Export

Assign the “Knowledge Export Layout” page layout to the needed profiles (System Admin) through Setup - Object Manager - LLM Knowledge Export - Page Layout - Page Layout Assignment.

LLM Knowledge Export Detail

Standard Buttons

EditDeleteCloneChange OwnerChange Record TypePrintable ViewSharingSharing HierarchyEdit Labels

Custom Buttons

Information (Header visible on edit only)

Knowledge Export Number

GEN-2004-001234

Status

Sample Text

Vector Store Id

Sample Text

Number of Links

25,484

File Id

Sample Text

Retry Number

40,037

Parent Knowledge Export

Sample Text

Type

Sample Text

Parent Record Id

Sample Text

Parent Title

Sample Text

Parent Knowledge Article ID

Sample Text

Parent Last Published Date

11/14/2025, 12:42 AM

Owner

Sample Text

System Information (Header visible on edit only)

Created By

Sample Text

Last Modified By

Sample Text

Custom Links (Header visible on edit only)

Related Lists

Files

This list is not customizable

LLM Knowledge Export Links

Knowledge Export Link Number	Status	Combined Group & Category Name	Vector Store ID
Sample Text	Sample Text	Sample Text	Sample Text

LLM Knowledge Exports

Knowledge Export Number	Parent Title	Type	Status
Sample Text	Sample Text	Sample Text	Sample Text

Related Content

Title	Created Date	Last Modified Date
Sample Text	11/14/2025, 12:42 AM	11/14/2025, 12:42 AM

Object: LLM Knowledge Export Link

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Advanced Communities Ltd. registered in England and Wales (No. 6659236) VAT No. 115662818
 We Work 30 Churchill Place, Canary Wharf, London E14 5RE United Kingdom
 We Work SOMA, 156 2nd Street, San Francisco, CA 94105 USA
 sales@advancedcommunities.com +44 20 3051 0075

Assign the “Knowledge Export Data Category Link Layout” page layout to the needed profiles (System Admin) through Setup - Object Manager - LLM Knowledge Export Link - Page Layout - Page Layout Assignment.

LLM Knowledge Export Link Detail

Standard Buttons: [Edit](#) [Delete](#) [Clone](#) [Change Owner](#) [Change Record Type](#) [Printable View](#) [Edit Labels](#)

Custom Buttons:

Information (Header visible on edit only)

Knowledge Export Link Number	GEN-2004-001234	Combined Group & Category Name	Sample Text
LLM Knowledge Export	Sample Text	Vector Store ID	Sample Text
LLM Mapping	Sample Text		
Status	Sample Text		
File Id	Sample Text		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-----------------------------	------------------	-----------------------------

Custom Links (Header visible on edit only)

Run Scheduled Jobs

AC Knowledge Man... Home Knowledge Knowledge Settings Knowledge Categories AC Knowledge Article Subscr... Case Deflection Questions **Jobs Manager** More

Jobs Manager

Scheduler Queueable Batch

Select Scheduler Job

[Run](#) [Reload](#)

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type	Cron Trigger ID
1 Del	ArticleUploaderToLLM		Jun 18, 2025, 14:39:53	Jun 18, 2025, 14:39:53	Jun 26, 2025, 17:05:00	WAITING	08eak00000LHhfaAAD
2 Del	ArticleDeleterFromLLM		Jun 18, 2025, 14:39:53	Jun 18, 2025, 14:39:53	Jun 27, 2025, 12:00:00	WAITING	08eak00000LHhfbAAD

The Jobs Manager is a centralized control panel that allows administrators to configure and manage background automation jobs across AC Knowledge Enterprise. It is divided into three functional sub-tabs:

Scheduler – for configuring scheduled (CRON-based) jobs.

Queueable – for tracking or debugging queueable classes triggered by automation logic.

Batch – for monitoring or managing batch jobs, typically triggered behind the scenes.

These jobs are essential for features such as reputation scoring, subscription update delivery, and LLM integration (e.g., article uploads, deletions, log syncing, and index maintenance).

Scheduler Tab

The Scheduler sub-tab allows administrators to create, modify, or remove scheduled jobs that run at specific time intervals using CRON expressions. These jobs power the platform’s automated behavior – such as syncing knowledge articles with the LLM platform or sending update notifications to subscribers.

Below is a list of available scheduler jobs and their configurations:

Reputation Points Update

 *Not enabled by default. Must be scheduled manually.*

If your organization uses reputation tracking for articles, schedule this job to automatically update article reputation scores based on user interactions.

Steps to Schedule:

Schedule Job

Job Name

Reputation Points Update

CRON Expression

0 0 0 * * ?

Class Name

acReputationPointsUpdateScheduler

Cancel

Run

1. Go to Jobs Manager → Scheduler tab
2. Select Reputation Points Update
3. Click Run
4. In the popup:
 - Edit the job name if desired
 - Enter CRON expression (e.g., 0 0 0 * * ? for daily at midnight)
*0 0 0 = seconds, minutes, hours
5. Click Run

You may schedule this job multiple times with different CRON settings.

Subscription Mailing and Updates

 *Not enabled by default. Must be scheduled manually.*

This job automatically sends update notifications to article subscribers when content is modified.

Steps to Schedule:

1. Go to Jobs Manager → Scheduler tab

2. Select Subscription Mailing and Updates
3. Click Run
4. In the popup:
 - Edit the job name if needed
 - Enter CRON expression (e.g., 0 0 0 * * ?)
**0 0 0 = seconds, minutes, hours*
5. Click Run

Schedule Job

Job Name

Reputation Points Update

CRON Expression

0 0 0 * * ?

Class Name

acReputationPointsUpdateScheduler

Cancel

Run

Notifications will only be sent if the job is actively scheduled.

ArticleUploaderToLLM

⚠ Not enabled by default. Must be scheduled manually.

The job is a scheduled task that runs to process articles flagged for upload to the LLM platform. It prepares these articles for linking with the default LLM vector storage and ensures they are correctly mapped.

This job should run at least once per hour to ensure that newly published articles are continuously processed and uploaded for indexing in the LLM vector storage.

If you need the job to run more frequently, or if you want to delete the existing one and schedule it at a custom time, you can do so through the Jobs Manager.

Recommended frequency: At least once per hour.

Steps to Schedule:

1. Go to Jobs Manager → Scheduler tab
2. Select ArticleUploaderToLLM
3. Click Run
4. In the popup:

- Confirm/edit the job name
 - Use CRON expression: 0 5 * * * ?
5. Click Run

Queue Execution Order:

- *CreateKnowledgeExportRecordsQueueable*: Creates Knowledge Export Records for preparing articles to be uploaded to LLM.
- *ArticleUploaderToPlatformOpenAIQueueable*: Uploads articles to the LLM platform and links them to the default LLM vector storage.
- *ArticleLinkedToOpenAIStorageQueueable*: Links the uploaded articles to mapped vector storages.

ArticleDeleterFromLLM

 Not enabled by default. Must be scheduled manually.

This job manages the removal of articles marked for deletion from the LLM platform and all linked vector storages. It ensures timely cleanup and helps maintain accurate, relevant data within your AI integration.

If you need the job to run more frequently, or if you want to delete the existing one and schedule it at a custom time, you can do so through the Jobs Manager.

Recommended frequency: Daily.

Steps to Schedule:

1. Go to Jobs Manager → Scheduler tab
2. Select ArticleDeleterFromLLM
3. Click Run

In the popup:

 - Confirm/edit the job name
 - Use CRON expression: 0 1 * * * ?
4. Click Run

Queue Execution Order:

- *KnowledgeExportReadyToDeleteBatch*: Selects non-deleted Knowledge Export Records, checks if they are published, and changes their status to 'Pending Deletion'. Non-published articles are also processed here.
- *ArticleDeletionFromOpenAIQueueable*: Deletes the uploaded files from the LLM platform and unlinks them from mapped vector storages for articles marked with 'Pending Deletion'.

LLMLogsSendAndDeleteScheduler

 Not enabled by default. Must be scheduled manually.

This job is responsible for handling system logs generated during LLM operations. It automates two actions:

- Sending stored LLM request logs
- Deleting logs after successful processing

It helps ensure that log records are transmitted as needed and do not accumulate unnecessarily in the system.

Recommended frequency: Daily

Steps to Schedule:

1. Go to Jobs Manager → Scheduler tab
2. Select LLMLogsSendAndDeleteScheduler
3. Click Run
4. In the popup:
 - Confirm or edit the job name
 - Use CRON expression: 0 4 * * * ? (runs daily at 4:00 AM)
5. Click Run

acknowltng_AC_Delete_Knowledge_Exports-2

Enabled by default.

Queueable Tab

The Queueable sub-tab in the Jobs Manager displays a list of queueable jobs that are triggered internally by various automation flows across AC Knowledge Enterprise. These jobs are not scheduled manually like CRON-based schedulers – instead, they are executed as part of backend logic when triggered by platform activity (e.g., article upload or deletion).

This tab allows administrators and developers to monitor, trace, or debug the execution of these queueable classes. These are particularly important for the LLM integration feature, where multiple queueable jobs are used to prepare, upload, link, or delete articles from the LLM platform.

Below are the queueable jobs currently available in the system. Each scheduled job in the system has its own queue that records the history of its executions. Admin can review these records on this page to monitor or debug job activity.

If required, an administrator can manually trigger any of these jobs without waiting for the next scheduled run:

- *ArticleDeletionFromOpenAIQueueable*
Handles the deletion of uploaded articles from the LLM platform. Triggered by the ArticleDeleterFromLLM scheduled job for records marked as “Pending Deletion.”

- *CleanupOpenAIPlatformQueueable*
Executes cleanup routines on the LLM platform, including unlinking and clearing references to articles or vector storage entries.
- *CreateKnowledgeExportRecordsQueueable*
Responsible for creating Knowledge Export records based on newly published articles. Used in the LLM upload workflow initiated by the ArticleUploaderToLLM scheduled job.

Batch Tab

The Batch sub-tab in the Jobs Manager displays background jobs that are executed in batch mode. These jobs process records in bulk and are used to support various automation workflows across AC Knowledge Enterprise.

The tab provides visibility into available batch jobs and can be used to monitor or investigate their execution when triggered by system logic or platform events.

- *ClearKnowledgeExportBatch*
Processes Knowledge Export records and clears them based on system-defined conditions. Used in cleanup workflows.
- *KnowledgeExportReadyToDeleteBatch*
Identifies eligible Knowledge Export records for deletion. Updates their status to Pending Deletion when applicable. This batch is used in the deletion flow initiated by the ArticleDeleterFromLLM scheduler.
- *LLMLogsSendAndDeleteBatch*
Sends LLM request log records and marks them as processed. Triggered by the LLMLogsSendAndDeleteScheduler.
- *RepublishingArticlesBatch*
Executes republishing logic for articles that need to be reprocessed or reindexed. This may occur when correction or update operations are performed.
- *RetryKnowledgeExportBatch*
Attempts to reprocess Knowledge Export records that previously failed to upload to the LLM platform. Used in combination with the RetryUploadToLLMScheduler.

Set up Record Types and Field Sets

Create Knowledge Record Types to identify each article type and determine the page layout.

Setup Home Object Manager

SETUP > OBJECT MANAGER Knowledge

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

Record Types
3 Items, Sorted by Record Type Label

Quick Find New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
FAQ		✓	Lisa Jones, 19.12.2017 11:05
How To Articles		✓	Lisa Jones, 25.02.2020 11:47
Solution		✓	Lisa Jones, 25.02.2020 12:04

If you are planning to use our custom AC Knowledge Detail component, create a Field Set for each Knowledge Record Type. This has to be done to define the fields shown on the community page for each knowledge record type. The Field Sets should have exactly the same name as the corresponding Record Types.

For example, if the Record Type has the name “FAQ”, then you should have a Field Set with the same name.

Setup Home Object Manager

SETUP > OBJECT MANAGER Knowledge

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets

Field Sets
3 Items, Sorted by Field Label

Quick Find New

FIELD LABEL	API NAME	CREATED BY	MODIFIED BY	DESCRIPTION
FAQ	FAQ	Lisa Jones, 19.12.2017 11:05	Lisa Jones, 25.02.2020 12:11	knowledge
How To Articles	How_To_Articles	Lisa Jones, 25.02.2020 12:09	Lisa Jones, 25.02.2020 12:11	knowledge
Solution	Solution	Lisa Jones, 25.02.2020 12:12	Lisa Jones, 25.02.2020 12:12	knowledge

We do not provide any custom fields for the article body in a package. You can use fields that you already have or create new ones of any field type and add them to the Field Set.

As an example, we are using a field of a Rich Text type called Article Body!

NOTE! The AC Knowledge Detail component will NOT work without having the record types configured. You should have at least one Record Type and one corresponding Field Set.

Set up Data Categories and Groups

To add a Data Categories filter to the page, go to the Setup – Data Category Setup.

To create a Group, click “New” in the Category Groups column, then enter a Name and a Description and click “Save”.

The screenshot shows the 'Data Category Setup' interface. At the top, there's a header with a gear icon and the text 'SETUP Data Category Setup'. Below this is a section titled 'Data Categories' with a descriptive sentence: 'Category groups are hierarchies of data categories. For example, a category group named Location might contain...'. The interface is divided into two main panels. The left panel, titled 'Category Groups', contains a 'New' button (highlighted with a green box), followed by input fields for 'Group Name', 'Group Unique Name', and 'Description', and 'Save' and 'Cancel' buttons at the bottom. The right panel, titled 'Categories', contains a toolbar with 'Save', 'Undo', 'Redo', 'Expand All', and 'Collapse All' buttons.

After that, you can add categories to this group. Click the “Add” or “Actions” button and add a sibling or child category. Click “Save”.



SETUP

Data Category Setup

Data Categories

Category groups are hierarchies of data categories. For example, a category group named Location might contain a geographical hierarchy of cont

Category Groups

New

Active Category Groups

- Community Cloud
- Community Cloud Best Practices

Inactive Category Groups

- AC Products
- Salesforce

Categories in AC Products

Save Undo Redo Expand All Collapse All

- All
- Troubleshooting
- Latest Updates
- FAQ

Actions

- Add Sibling Category
- Add Child Category
- Edit Category
- Order Child Categories Alphabetically
- Delete Category...

Once you have created all the necessary Groups and Categories, click the key button near the group name to activate them.

Data Categories

Category groups are hierarchies of data categories. For example, a category group named Location might cont

Category Groups

New

Active Category Groups

- Community Cloud
- Community Cloud Best Practices

Inactive Category Groups

- AC Products
- Salesforce

Categories in AC Products

Save Undo Redo Expand All Collapse All

- All
- Troubleshooting
- Latest Updates
- FAQ

Activate Category Group

You can choose to prefilter and show Knowledge Articles and Data Categories of a certain Data Category or a Data Category Group.

To filter articles by a specific group and/or category, add the API name of the appropriate group and category into the properties box of the following components: AC Knowledge, AC Knowledge Filters, and AC Knowledge Breadcrumbs.

AC Knowledge

Items Per Page: 5

☐ Hide component search

Filter By Group: Group_1

Filter By Category: Category_A1

☐ Hide Article Types

Data Categories Visibility

Modify the global data categories visibility in your organization in Setup - Default Data Category Visibility.

SETUP
Default Data Category Visibility

Default Data Category Visibility

If a user has a role, the data category visibility settings for that role determine the user's access to categories. Users without roles can access

Action	Category Group	Visibility	Visibility Details
Edit	AC Products	All	All categories are visible by default
Edit	Community Cloud Best Practices	None	No categories are visible by default
Edit	Salesforce	None	No categories are visible by default

There are three types of visibility:

- All Categories: All categories are visible
- None: No categories are visible

- Custom: Selected categories are visible

You can also configure the Data Categories Visibility via Roles, Profiles, or Permission Sets.

- For roles: enter Roles in the Quick Find box, then select **Roles**.
- For a role on the customer portal or partner portal: enter Users in the Quick Find box, then select **Users**.
- For permission sets: enter Permission Sets in the Quick Find box, then select **Permission Sets**.
- For profiles: enter Profiles in the Quick Find box, then select **Profiles**.

Open a data category group for edit.

- For roles, in the Category Group Visibility Settings related list, click Edit next to the category group you want to modify.

SETUP
Roles

Role

Edge Communications Customer User

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: [asd](#) » [CEO](#) » [Edge Communications Customer Executive](#) » [Edge Communications Customer Manager](#) » Edge Communications Customer User

[Users in Edge Communications Customer User Role \(2\)](#) | [Category Group Visibility Settings \(3\)](#)

Role Detail

Label	Edge Communications Customer User	Role Name	EdgeCommunicationsCustomerUser
This role reports to	Edge Communications Customer Manager	Role Name as displayed on reports	Edge Communications Customer User
Modified By	Lisa Jones 26.11.2018 15:16	Sharing Groups	Role , Role Internal and Portal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Partner Role	☐		
Customer Role	☒		

Users in Edge Communications Customer User Role

[Users in Edge Communications Customer User Role Help](#)

Action	Full Name	Alias	Username	Last Login	Active
Edit	Rose Gonzalez	rgonz	rose@edge.com	28.10.2019 14:08	☒
Edit	Sean Forbes	sforb	sean@edge.com	03.10.2019 16:27	☒

Category Group Visibility Settings

[Category Group Visibility Settings Help](#)

Action	Category Group	Visibility	Visibility Details
Edit	AC Products	None	No categories are visible to this role and subordinates
Edit	Community Cloud Best Practices	Inherited from CEO	All categories are visible to this role and subordinates
Edit	Salesforce	Inherited from CEO	All categories are visible to this role and subordinates

- For permission sets and profiles:
 1. Click a permission set or profile name.
 2. Click **Data Category Visibility**.
 3. Click "Edit" next to the data category group you want to assign.

Category Group
AC Products: Visibility Settings for Customer Community Plus Login 2
[Help for this Page](#)

Category Group Settings

Save

Cancel

Profile

Customer Community Plus Login 2

Name

AC Products

Active

☒

Description

Category Group Visibility

Select the visibility of this category group for this profile. [What is this?](#)

Visibility

☐ All Categories
☐ None
☒ Custom

Available Categories:

All

AC Knowledge Enterprise

Troubleshooting

Latest Updates

Add >

< Remove

Selected Categories:

All > AC Knowledge Enterprise

Save.

Knowledge Settings

Configure Knowledge settings in the Knowledge Settings tab.

General	Reputation Points
Default Knowledge Base Language English	Enable Reputation Points for Article Contributions ☐
Enable Multiple Languages Support ☐	Experience Cloud Site Select an Option
Knowledge Object API Name Knowledge	Number of Points Given for Article Contributions 3
Enable Article Following ☒	
Organization-Wide Email Address for Notifications Select an Option	
Article List	Article Detail
Enable Ordering by Custom Date Field ☐	Enable Enhanced View of Articles ☒
Field API Name for Custom Ordering (Date Fields Only) Last Modified Date	Article Body Field API Name Select an Option
LLM Settings	Logger Settings
LLM Named Credential ⓘ acknowledg__OpenAI_API_NC	Notify Admin About LLM Integration Issues ☒
LLM Default Vector Store ID ⓘ TEST vector storage for all	Email for Integration Issue Alerts ⓘ serhii.honcharenko+sandbox_know
Enable LLM Mapping ⓘ ☐	Log Retention Period (Days) ⓘ 1
LLM Last Processed Date ⓘ 2025-06-22T23:21:14.000Z	
LLM Export Field Set ⓘ LLM Field Set	
Validate LLM Settings Save Changes	

General

- Default Knowledge Base Language

If you use another language, you can change the language in the Knowledge Settings by choosing the necessary language from the drop-down list.

Note! It is only possible to choose one language.

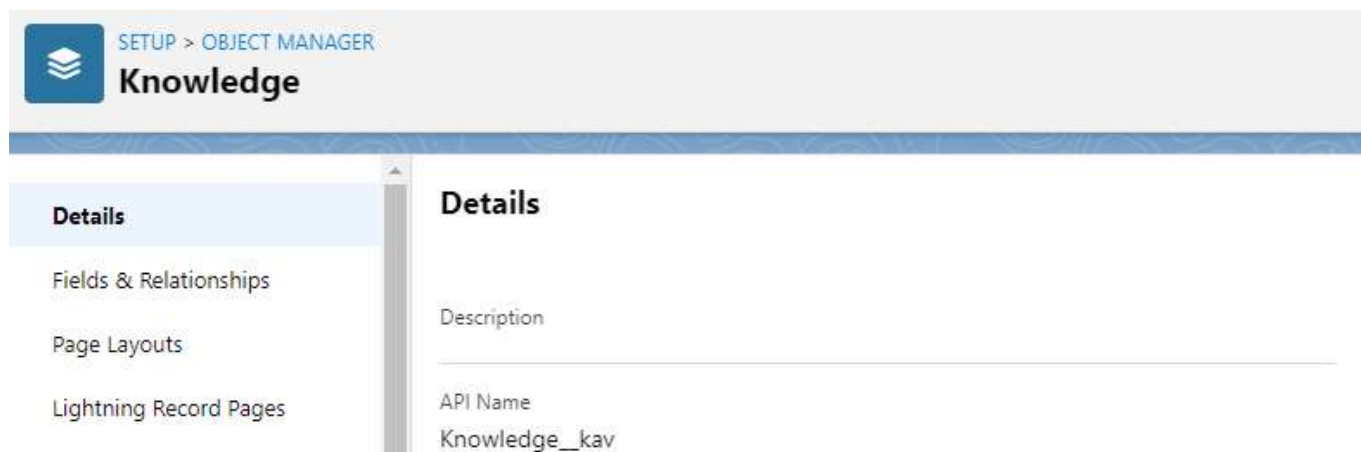
- Enable Multiple Languages Support

Enable the checkbox to offer your knowledge base articles in multiple languages. Users will see articles translated to the language defined in their user locale settings.

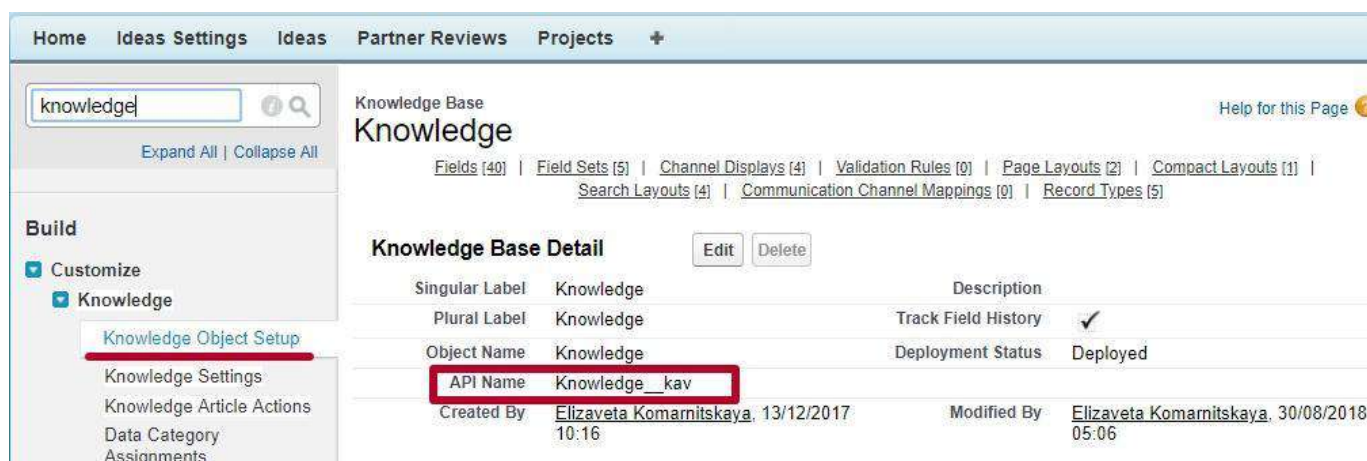
- Knowledge object API name

Make sure a correct API name is specified in this field, otherwise your knowledge base will not be displayed.

In Salesforce Lightning: Go to Setup – Object Manager – Knowledge. Copy the knowledge object API name and paste it to the field.



In Salesforce Classic: Setup – Knowledge Object Setup. Copy the knowledge object API name and paste it to the Knowledge Settings.



- Enable Article Following

Enable the following article option to let community members follow the specific article and to be notified via email about the new published article versions.

- Organization-Wide Email Address for Notifications

Choose from which org-wide email address notifications for Reputation Points and Article Updates must be sent.

Note If no specific address is selected, notifications will not be sent.

Reputation Points

- Enable Reputation Points for Article Contributions

Encourage community members to contribute to the Knowledge Base by enabling reputation support and awarding them reputation points for creating articles from the community.

Make sure you check the "Enable setup and display of reputation levels" setting for the community in Experience Workspaces - Administration - Preferences.

- Experience Cloud Site

Select the Site to specify the one where the reputation points for creating articles will be awarded.

If the ID is not specified, Knowledge Reputation Support will be used for all available communities.

To calculate and update reputation points automatically, see [Create Scheduled Jobs!](#)

- Number of Points Given for Article Contributions

Set the number of points to be awarded for publishing articles on the community.

Article List

- Enable Ordering by Custom Date Field

Enable knowledge articles' ordering by custom date field to create a better structure of your knowledge base.

- Field API Name for Custom Ordering (Date Fields Only)

The field is filled in with a default value. Use the existing Date field on the Knowledge object, or create a new one, and specify its API name in order to use the ordering by custom Date field.

Article Detail

- Enable Enhanced View of Articles

The setting activates a new flexible article detail view with collapsible/expandable sections and a table of contents.

Product Types

Last updated 4 days ago

Contents

Cameras
Laptops

Expand all

Collapse all

Cameras

Come in to try out our expanded selection of cameras, lenses and accessories. Plus, get photography advice from our experts and sign up for our photography classes.

We have a huge selection of cameras and lenses to make sure you'll be able to find the perfect match for you and your needs. We're also taking the guesswork out of choosing the right photography equipment by giving you a hands-on experience. Point, shoot and try different lenses on each camera to see the results. Or, just tell our trained associates about the kinds of shots you'll be taking and they'll help you with the perfect selection.

Laptops

Additional Information

If you installed AC Knowledge Management before summer 2020, we recommend you enable Enhanced Article Detail view by following the steps:

- Delete the Article Body field from the Field Set
 - Enable Enhanced Article Detail view checkbox
 - Copy and paste the Article Body API name into the next field.
- Article Body Field API Name

Create an Article Body (the name can be different) field for the Knowledge object (see [Create Knowledge Articles](#)) and specify Article Body field API name in order to use the Enhanced Article Detail view.

Please note that by "Article Body" field we mean the field(s) which would be used to store contents of the article. In your case it could be a completely different field or fields.

LLM Settings

The LLM Settings section contains critical configuration options for the AI-powered LLM (OpenAI) integration within AC Knowledge Management. These settings ensure that the AI

assistant functions optimally by specifying which external credentials, vector store, and field set are used in the integration.

- LLM Named Credential

Specify the Named Credential used for authenticating API requests to the LLM platform. The value entered here will authenticate the connection between Salesforce and the LLM provider (e.g., OpenAI). Make sure there is the prefix in the value: "acknowltnng__".

Example: *acknowltnng__OpenAI_API_NC*

Use this value unless you prefer another custom solution.

- LLM Default Vector Store ID

Select the vector storage where knowledge articles are stored for LLM responses. This setting ensures that articles are linked with the correct vector store for processing by the LLM platform.

A picklist displays available vector storage options retrieved directly from the LLM platform via API.

- Enable LLM Mapping

Enable linking a single article to multiple mapped Vector Storages based on the mapping. If set to true, this allows a more flexible data storage configuration by linking articles to multiple vector storages.

- LLM Last Processed Date

Displays the last time knowledge articles were synced with the LLM platform. Automatically updated after every successful sync of knowledge articles.

- LLM Export Field Set

The LLM Export Field Set allows you to select the Field Set that contains the specific fields you want to export to the LLM platform. Only the fields included in the selected Field Set will be processed and uploaded to the LLM vector storage.

The Field Set should contain relevant fields such as Title, Summary, and Article Body. You can choose to include additional fields as needed. These fields are extracted from the Knowledge object and used to generate a specially formatted JSON that will be sent to the external system (LLM platform).

Important Note:

If you do not include the appropriate fields in the selected Field Set, no data will be sent to the external system.

The field set is selected from the available Field Sets that are created on the Knowledge object level. You can either use an existing Field Set or create a new one, depending on your needs.

Make sure that only the necessary and relevant fields are included in this Field Set to ensure proper data export and processing.

- Validate LLM Settings Button

Click the button to verify the connection between the Named Credential and the specified Vector Store ID.

Success toast: *LLM Connection Successful. Named Credential and Vector Store ID are valid.*

Failure toast: *LLM Connection Failed. Please check your Named Credential and/or Vector Store ID settings.*

Note: Learn more about LLM integration [here](#).

Logger Settings

The Logger Settings Tab allows administrators to configure how system logs are handled during the LLM (Large Language Model) integration. This section is essential for managing integration issues and keeping track of the system's behavior.

- LLM Notify Admin About LLM Integration Issues

When enabled, administrators are notified about any issues related to the LLM integration. Ensures admins receive alerts when there are any problems with LLM processes, helping them take necessary actions to resolve issues quickly.

- Email for Integration Issue Alerts

Enter the email address where alerts related to LLM integration issues should be sent. This field allows admins to specify the recipient email for receiving critical integration issue alerts, ensuring that the right person is informed immediately.

- Log Retention Period (Days)

Defines how long the LLM integration logs are retained. Specify the number of days to keep log data for troubleshooting and analysis. This ensures that logs are not stored indefinitely, and old logs are purged after the specified period.

Create Knowledge Articles

To start creating articles, go to the AC Knowledge app, and open the Knowledge tab.

If you can't see the Knowledge tab, edit AC Knowledge app Navigation Items and add a Knowledge tab.

Create the following custom fields on the Knowledge object:

- Article Body (rich text area)
- Section Anchors (long text area)
- Enable Collapsible Sections (checkbox)

Please, note! Section Anchors and Collapsible/Expandable sections are only available with Enhanced Article Detail view enabled in the Knowledge Settings tab!

To use Knowledge Advanced Navigation, create also:

- Navigation Title (text) with a mandatory API Name - **Nav_Title**

Note! If this field does not exist or has an incorrect API Name, the articles won't be displayed in the Advanced Navigation component.

- Visible in Navigation (checkbox)
- Sort Order in Category (number)

We also recommend checking the Knowledge layout and adding all custom fields mentioned above and the following standard fields to the layout:

- Visible in Internal App (optionally) - enabled by default
- Visible to Customer
- Visible to Partner
- Visible in Public Knowledge Base

Save Quick Save Cancel Undo Redo Layout Properties

Fields
Related Lists
Mobile & Lightning Actions

Quick Find Field Name

Section	Article Archived ...	Article Created Date	Article Total Vie...	Assignment Date	Crea
Archived By	Article Body	Article Master La...	Article Type	Assignment Due Date	Crea
Archived Date	Article Case Asso...	Article Number	Assigned By	Assignment Note	Enab
Article Archived By	Article Created By	Article Record Type	Assigned To	Created By	First

Salesforce Mobile and Lightning Experience Actions

Publish Article Edit as Draft

Knowledge Detail

Information

- Title Sample Text
- Nav Title Sample Text
- URL Name Sample Text
- Summary Sample Text
- Article Body Sample Text
- Section Anchors Sample Text
- Sort Order in Category 77
- Visible In Public Knowledge Base ☒
- Visible in Navigation ☒
- Enable Collapsible Sections ☒

To create knowledge articles, go to the Knowledge tab, click the “New” button, and choose an appropriate Article Type.

Fill in the appropriate fields and define channels to make an article visible for partners, customers, and guests.

Enter an article navigation title (Nav Title) and enable the “Visible in Navigation” checkbox to make it visible within the AC Knowledge Advanced Navigation (not available with the Knowledge Filters component).

Information

*Title

Adding comments to tickets

Nav Title ⓘ

How to add comments to the ticket?

*URL Name

Adding-comments-to-tickets

Summary

Once a ticket has been created and is assigned to an agent, it's the agent's job to resolve the support request. To do that, you may need to gather more information from the requester. To communicate with the requester, you add public comments to the ticket. Public comments can be read by anyone who has access to the ticket.

Article Body

 Source   **B** *I* U ~~S~~ *I_x*         

    Format Font Size A A 

Adding inline images to a ticket comments

You can add inline images to a ticket comment. Rich text formatting must be enabled (see [Enabling formatting options for agents](#)).

To add inline images

- Drag and drop an image from your computer into the comment window, or paste a copied image into the window by right-clicking and selecting **Paste** or by pressing **Ctrl** or **⌘ + V**.
- Enabling attachments in tickets). Instead, you need to add images to tickets as attachments (see [Adding attachments to ticket comments](#)).

Section Anchors ⓘ

Commenting basics:commenting_basic;Adding comment to a ticket:add_comment_ticket;Adding comments:add_comment

Sort Order In Category ⓘ

1

Visible In Public Knowledge Base



Visible In Navigation



Enable Collapsible Sections



Cancel

Save & New

Save

If the Knowledge article is rather long, you can divide it into section anchors by adding section title and ID into the Section Anchors field. See [Use Section Anchors](#) and Enable Collapsible Sections.

Define the article sort order in the category (available for Advanced Navigation only).

Each new article is automatically saved in a draft mode and is not visible on the community until you publish it.

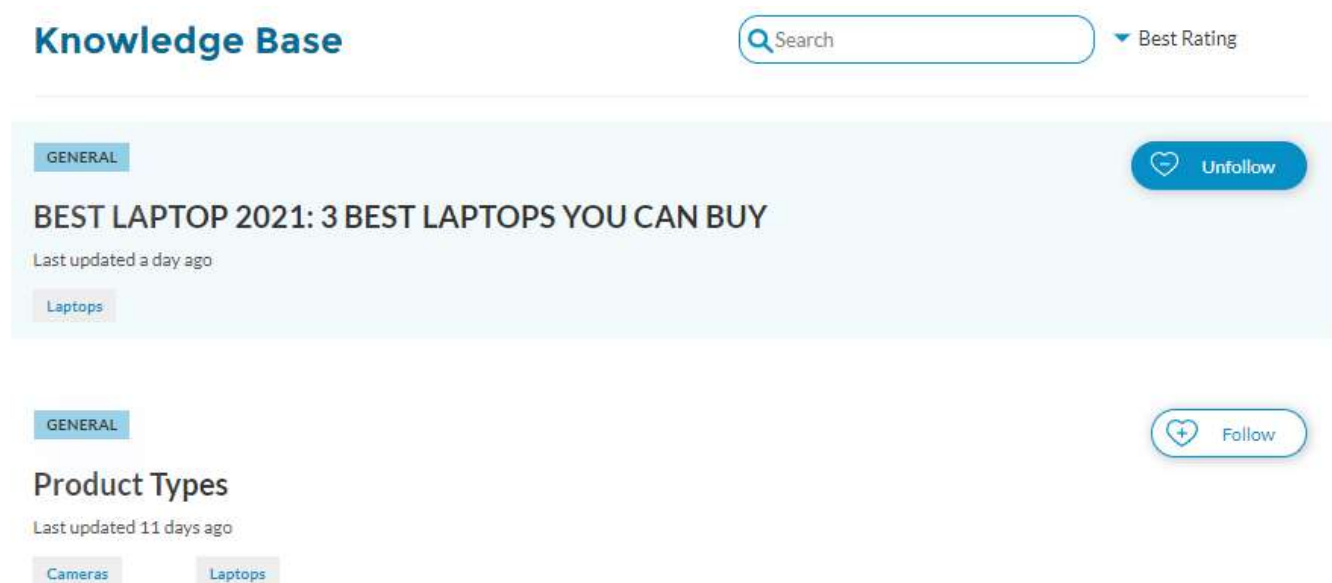
Article Following/Subscription

This feature lets your site members subscribe to their favorite articles, and helps to inform your members about changes or version updates of the articles they are following by sending email notifications.

To use Article Subscription feature do the following:

- 1) Enable the “Enable article following” checkbox in the Knowledge Settings tab - Default On
- 2) On the AC Knowledge Article Subscription object create a lookup field to Knowledge object with a mandatory name Article.

To follow an article, go to the knowledge base, choose an article and click the Follow button.



You will get an email notification about changes or article version updates.

Click Unfollow to stop getting the article notifications.

New version of "Product Types" was published. Inbox x



Damara via rhqap3wzrsij.09-7upi5eak.eu40.bnc.salesforce.com
to me ▾

27 Oct 2021, 00:00

Dear Dagmara Khasueva

The article "Product Types" that you have subscribed to have been updated on 26.10.2021, 17:37.

Please see the updated version on the community <https://accec-developer-edition.eu40.force.com/achelp/s/article/Product-Types>.

↩ Reply

➡ Forward

Change email subject for the article email notifications in Setup – Classic Email Templates.

Email Template Send Test and Verify Merge Fields

Subject | Changed Subject "{!Title}" was published.

HTML Preview

Dear {!UserName}

The article "{!Title}" that you have subscribed to have been updated on {!LastPublishedDate}.

Please see the updated version on the community {!UrlName}.

See also [Article Subscriptions page](#) to set up a page on community.

Use Section Anchors

To divide an article into sections, do the following:

- insert the following piece of code into the Article Body Source

```
<div class="article__item article__item--shape" id="section-one">
<h2>Section One</h2>
<div class="article__item-content">
<p>Section Text</p>
</div>
</div>

<div class="article__item article__item--shape" id="section-two">
<h2>Section Two</h2>
<div class="article__item-content">
<p>Section Text</p>
</div>
```

</div>

- provide the section ID and Title

We recommend having the section ID similar to the section title, because it will be displayed in the address bar.

e.g. if the section title is *"Using tags to manage workflow"* than the section Id could be *"manage-workflow"*

- copy the title and Id and paste them into the Section Anchors field using the following format: *Section Title:Section-ID;*
 - if the article title contains a colon, the format would be: *Section Title\ SectionTitle:Section-ID;* (for example, if title name is "Tags: Overview", the format would be *"Tags\Overview:Section-ID"*).

Section Title and section ID should be separated with colons and different sections separated with semi-colons.

The screenshot shows a rich text editor interface. The top toolbar includes a 'Source' button, which is highlighted with a red box. Below the toolbar, the HTML code for two sections is displayed. The first section has an ID of 'section-one' and a title 'Section One'. The second section has an ID of 'section-two' and a title 'Section Two'. Red arrows point from the 'Section One' title and 'section-one' ID in the code to the 'Section One:section-one' text in the 'Section Anchors' field. Another red arrow points from the 'Section Two' title and 'section-two' ID in the code to the 'Section Two:section-two' text in the 'Section Anchors' field. The 'Section Anchors' field is also highlighted with a red box and contains the text 'Section One:section-one; Section Two:section-two'.

Enable Collapsible Sections

Collapsible sections feature lets users collapse or expand sections of the articles by using the "plus" icon next to the section heading, or by clicking the Expand all/Collapse all buttons.

Expand all
Collapse all

Cameras
+

Laptops
-

We offer an extensive range of desktop computers, laptops, servers and devices that can be tailored to suit any situation and requirements.

Whether you need portable and robust, yet high performing notebooks for the classroom, a sleek and powerful All-in-One desktop for a clutter-free work space, or a comprehensive network of productivity driving devices for a professional setting, we can find the right product for you.

Additional Information
+

Please, note! Collapsible Sections feature is only available with Enhanced Article Detail view enabled in the Knowledge Settings tab.

1. To set up the feature, follow these steps:

- Create a custom field on the Knowledge object: "Enable Collapsible Sections" – checkbox field.
- Check the Knowledge object layout and add the custom field mentioned above to the layout. Click Save.

2. To enable the article collapsible sections, do the following:

- Create a new knowledge article

- Fill in the appropriate fields including the article body field

Information

*Title
BEST LAPTOP 2021: 3 BEST LAPTOPS YOU CAN BUY

Article Body

MACBOOK AIR (LATE 2020)

The late-2020 MacBook Air, powered by Apple's M1 processor, is the best laptop you can buy. The base model, which includes 8GB of RAM and 256 GB of storage, starts at \$999.

Appearance-wise, this laptop has a lot in common with the Intel-powered MacBook Air that Apple released earlier this year, including the same 2560 x 1600 screen, Touch ID, 720p webcam, fingerprint sensor, and scissor-switch keyboard.

- Create **Section Anchors** to divide the article into sections
- Now, check the “Enable Collapsible Sections” checkbox and Save

Properties

Navigation Title

Article Created Date

Last Published Date

Sort Order in Category

Enable Collapsible Sections
☒

Visible in Navigation
☐

Visible In Internal App
☒

Visible to Customer
☒

Visible to Partner
☒

Visible In Public Knowledge Base
☒

- Assign your article to a data category and publish it.

Add Knowledge Categories

Assign a category to an article on the Article Detail page. Categories can be added or removed only when the article is in draft mode.

Edit Article Categories

Use the list on the left to select the categories you'd like applied to current article.

CATEGORIES

Expand All

Search Categories

☐ < Salesforce

☐ Licences

☐ Limitations

☒ Security Updates

☐ Tips and Tricks

☐ > Community Cloud Best Practices

☐ > AC Products

SELECTED CATEGORIES

▼ Salesforce (1)

... Security Updates

Cancel

Save

We provide custom functionality to improve the usage of standard data categories.

Standard Salesforce Data Categories are limited with only 40 symbols length. You can organize your Knowledge Base structure with the help of the custom Knowledge Categories object provided in the package.

It allows you to create custom category labels of any length and to add a category landing page.

* Knowledge Category Name

Using Support

Owner

Dmitry Omelchenko

Landing Content

Salesforce Sans 12

B *I* U 





Agent guide for Support

- [Adding comments to tickets](#)
- [Editing and managing your ticket fields](#)
- [Working with tickets](#)

Helpdesk basics

Show Landing Page



Group With Category Item

Helpdesk__c: Using_Support__c

Custom Label In Navigation

Custom Landing Title

- Knowledge Category Name - enter the name of the new knowledge category record. This name is used in the URL when the category is checked and in the Category Landing page title
- Landing Content (1) - add an image, description, or other information about the category you want to be visible in the category landing page
- Show Landing Page - enable to show the Category Landing page on the community
- Group with Category Item - enter unique names of the data category Group and Category separated with a colon

Important! Enter the data only using this format: **Group__c: Category__c**

Ex. Helpdesk_c:Using_Support_c

Data Categories

[Key](#)

Category groups are hierarchies of data categories. For example, a category group named Location might contain a geographical hierarchy and states. Use this page to manage category groups and the categories they contain.

The screenshot displays two side-by-side panels. The left panel, titled 'Category Groups', has a 'New' button and a section for 'Active Category Groups'. It contains form fields for 'Group Name' (filled with 'Helpdesk Products'), 'Group Unique Name' (filled with 'Helpdesk'), and a 'Description' text area. Below these are 'Save' and 'Cancel' buttons. At the bottom, under 'Inactive Category Groups', is a 'Test Group'. The right panel, titled 'Categories in Helpdesk Products', has buttons for 'Save', 'Undo', 'Redo', 'Expand All', and 'Collapse All'. It shows a tree view of categories: 'All', 'Helpdesk Support', and 'Using Support' (which is selected and highlighted in blue). A tooltip for 'Using Support' is visible, showing 'Category Name Using Support' and 'Category Unique Name Using_Support'. Below the tree are several categories: 'Agent guide for Support', 'Helpdesk base', 'Security and user access', 'Users, groups, and organizations', 'Tickets', 'Channels', 'Workflows', 'Email', 'Advice & Troubleshooting', 'Helpdesk Guide', 'Helpdesk Chat', and 'Helpdesk Talk'.

- Custom Label in Navigation (2) - optionally add a custom label displayed in the navigation sidebar
- Custom Landing Title (3) - optionally add a custom title for the category landing page

Browse by product

- [-] Helpdesk Support
 - Using Support **2. Nav Label**
 - + Agent guide for Support
 - + Helpdesk basics
 - + Security and user access
 - + Users, groups, and organizations
 - + Tickets
 - + Channels
 - + Workflows
 - + Email
- + Advice & Troubleshooting
- + Helpdesk Guide
- + Helpdesk Chat
- + Helpdesk Talk
- + Helpdesk Sell
- + Helpdesk Explore

Using Support **3. Landing Title**



Agent guide for Support **1. Landing Content**

- Adding comments to tickets
- Editing and managing your ticket fields
- Working with tickets

Helpdesk basics

- Helpdesk Support plan types
- Service Incidents at Helpdesk
- Notice for end-users who accidentally reach Helpdesk
- Streamlining your support workflow
- Testing changes in your sandbox (Enterprise)

Add Files to Knowledge articles

Knowledge articles may contain attached files. We provide a custom AC Knowledge Files component to expose them to community members on the Knowledge Detail page! All you need to do is to add files to an article using the Article record chatter feed.

To add a file, do the following:

- Enable Chatter in Setup - Chatter.
- Enable Feed Tracking in Setup Feed Tracking - Knowledge - Enable Feed Tracking
- Choose an article that you want to attach some files to.
- Attach up to ten files to the chatter feed and choose "All with access"

- Click “Share”.

The files you attached to the article will be visible on the community article detail page within the **AC Knowledge Files** component.

Configure Creating Articles on Community

You can also let your community champions create their own articles on the community using the AC Create Article Form component.

To configure adding articles on the community, create a separate knowledge Field Set with the name **“Create Article”** and add appropriate fields to be filled by community members when creating articles.

Knowledge Field Set
New Field Set

Field Set Edit Save Cancel

Enter Field Set information

Field Set Label

Field Set Name

Namespace Prefix

Where is this used?

Save Cancel

Articles created on the community are saved as drafts until they are checked and published by knowledge managers.

ARTICLE TYPE > CATEGORIES > ARTICLE CONTENT

Helpdesk Products

Available

- Helpdesk Support
- Helpdesk Guide
 - Getting Started
 - Using Guide
 - Advice & Troubleshooting
- Helpdesk Chat
- Helpdesk Talk
- Helpdesk Sell
- Helpdesk Explore

Selected

Select >>

<< Remove

Back Next

Configure Knowledge Voting

The voting feature helps you to figure out which Knowledge articles are helping your users most.

There is an option to assign articles a thumbs up or thumbs down vote, but we provide our custom knowledge voting system – a star rating.

To use a custom star rating system, go to Setup – Knowledge Settings and uncheck the “Enable thumbs up or down voting for article” checkbox (for Salesforce Classic).

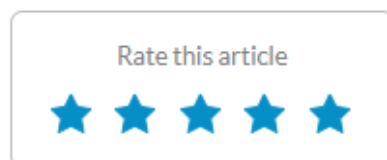


There are two options for knowledge articles voting:

1) Thumbs up/down



2) Stars Rating



You can choose the voting system or hide voting on the AC Knowledge Detail component.

It is possible to change between these options without losing votes. All votes an article gets will be converted back and forth as follows:

Stars to Thumbs:

- < 3 stars -> dislike
- > 2 stars -> like

Thumbs to Stars:

like -> 5 stars
dislike -> 1 star

Site users can leave their votes for articles, but guest users do not have permission to vote.

When using the thumbs up/down voting system, let site users add a comment when voting down.

Article Feedback

* Reasons

Other ▼

* Enter Your Reason

Please enter your reason

Cancel Save

In Setup – Object Manager – User Feedback create a lookup field on Knowledge object with the mandatory name "Article".

Configure Article Sort Order

You can organise and arrange how articles are displayed in your navigation.

The article ordering can be set up internally by assigning each article an appropriate number.

▼ Properties

Navigation Title	Visible In Internal App
Article Created Date	Visible to Customer
25.10.2021, 18:42	Visible to Partner
Last Published Date	Visible In Public Knowledge Base
05.11.2021, 16:05	
Sort Order in Category	
2	
Enable Collapsible Sections	
☒	

Article numbers should be assigned as in an elevator model:

1 - first article in navigation

0 - second article in navigation

1 - third article in navigation



Whether you're an Olympus camera owner or are considering making the switch, discover tips, events, and more to help guide your photographic journey.

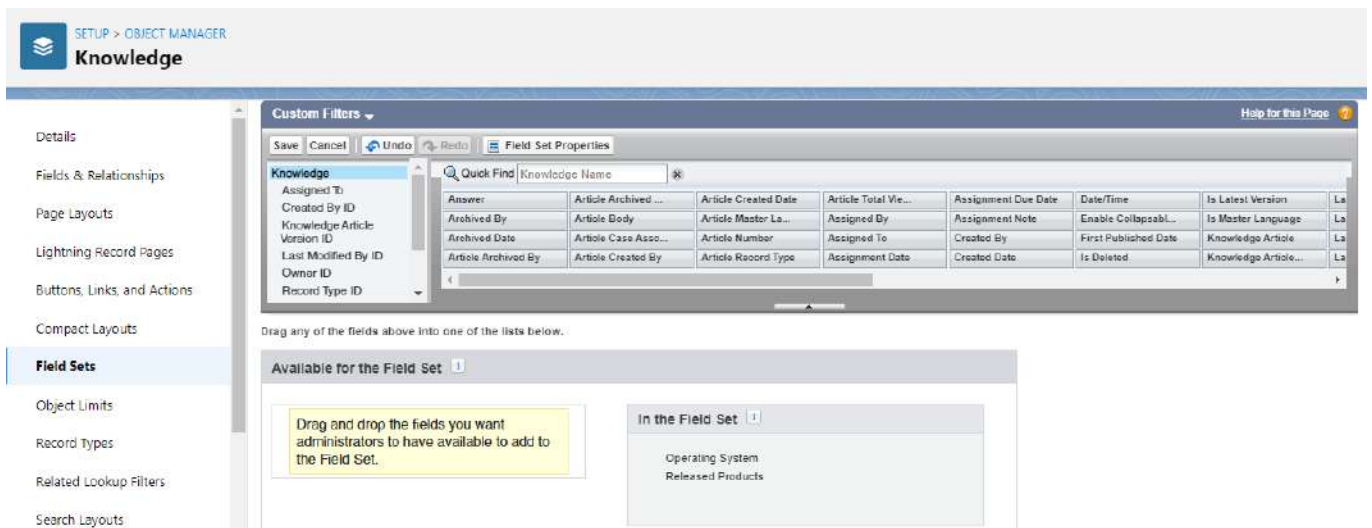


Note Unsorted articles are display below sorted articles

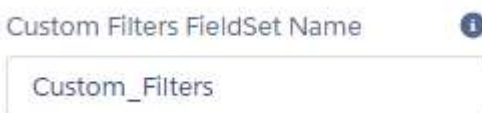
Create Custom Filters

Expand existing filters by creating a custom fieldset and adding custom fields to the fieldset.

In Setup – Object Manager – Knowledge create new fields and add them to the new fieldset. Supported fields: checkbox, picklist, multipicklist.



In Experience builder, go to the AC Knowledge List or AC Knowledge Filters component and type in the API name of the custom fieldset to the “Custom Filters FieldSet Name” property.



Publish your site and see the new filters added to the component.

▼ CUSTOM FILTERS

Released Products ^

☒ All

☐ Yes

☐ No

Operating System ^

☒ IOS

☒ Android

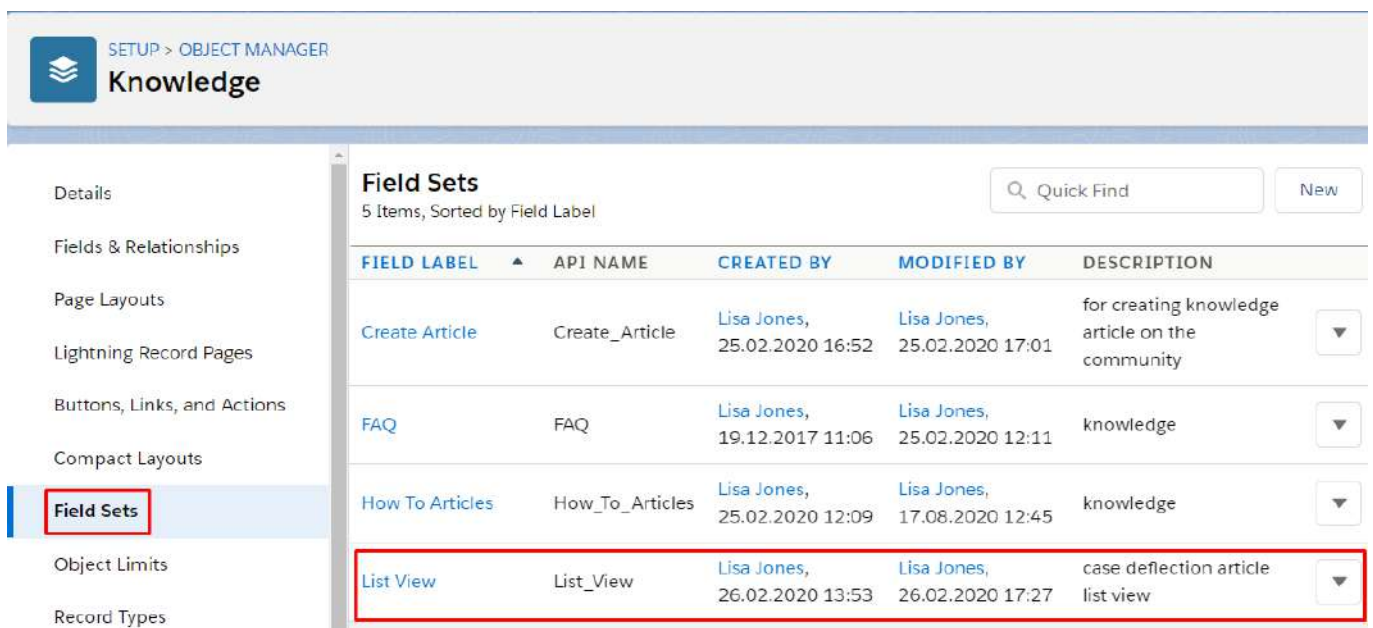
Case Deflection

Case Deflection (CD) is a powerful solution that helps you improve customer self-service and significantly decrease the number of cases.

The main idea is to let customers go through the most common problems and questions and find relevant knowledge articles for these problems before submitting a case.

AC Knowledge Management Enterprise package is supplied with an advanced Case Deflection functionality. Create a clear and structured hierarchy of the most common issues or frequently asked questions and provide community members with solutions from your Knowledge base.

To start configuring Case Deflection questions hierarchy, create a custom fieldset on the Knowledge object for displaying articles listed within the CD Questions on the community.



SETUP > OBJECT MANAGER
Knowledge

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types

Field Sets
5 Items, Sorted by Field Label

Quick Find New

FIELD LABEL	API NAME	CREATED BY	MODIFIED BY	DESCRIPTION
Create Article	Create_Article	Lisa Jones, 25.02.2020 16:52	Lisa Jones, 25.02.2020 17:01	for creating knowledge article on the community
FAQ	FAQ	Lisa Jones, 19.12.2017 11:06	Lisa Jones, 25.02.2020 12:11	knowledge
How To Articles	How_To_Articles	Lisa Jones, 25.02.2020 12:09	Lisa Jones, 17.08.2020 12:45	knowledge
List View	List_View	Lisa Jones, 26.02.2020 13:53	Lisa Jones, 26.02.2020 17:27	case deflection article list view

1. Go to Setup - Object Manager - Knowledge - Field Sets - New
2. Create a field set with the mandatory name **"List View"** that serves to display the list of articles for case deflection questions

Knowledge Field Set New Field Set

Field Set Edit Save Cancel

Enter Field Set information

Field Set Label

Field Set Name

Namespace Prefix

Where is this used?

List View

List_View

case deflection article list view

Save Cancel

3. Add appropriate fields. For example, Title, Summary, Last modified Date.

List View Help for this Page

Save Cancel Undo Redo Field Set Properties

Knowledge

Assigned To

Created By ID

Last Modified By ID

Owner

Record Type ID

User ID

User ID

Quick Find Knowledge Name

Last Modified Date	Owner	Sort Order in Cat...	Title	Visible in Naviga...
Last Published Date	Plan Availability	Source	URL Name	Visible In Public...
Mapping info betw...	Publication Status	Summary	Version Number	Visible to Customer
Nav Title	Section Anchors	System Modstamp	Visible In Intern...	Visible to Partner

Drag any of the fields above into the list below.

In the Field Set

Title

Summary

Last Modified Date

Create a field set with the mandatory name “**Detail View**” that serves to display the detail view of articles for case deflection questions.

Knowledge Field Set New Field Set

Field Set Edit

SaveCancel

Enter Field Set information

Field Set Label

Detail View

Field Set Name

Detail_View

Namespace Prefix

Where is this used?

case deflection article detail view

i

Save

Cancel

Add an Article Body field, or leave it empty if you have “Enhanced Article Detail view” enabled in the Knowledge Settings.

Case Deflection Question

Create a hierarchy of the most frequent issues and questions that community members can search for within the relevant knowledge articles. This will help you decrease the number of created cases.

Add questions within the CD Questions tab.

New Case Deflection Question

* Question

How to create a new article?

Parent Question

Search Case Deflection Questions...

Sort Order

Message to show to the user

Salesforce Sans 12 B I U

Go to the Knowledge Base page.

Find the Create Article button on the right.

Click a button and fill in a form.

Enable Case Create Button

☐

Cancel

Save & New

Save

- Question - add a question or statement that users often search for.
- Parent Question - search the existing case deflection questions for a parent question and create an unlimited number of level hierarchy. Note, that the articles display only for the last question in a thread.
- Sort Order - put the questions in the preferred order and create a clear structure.
- Message to show to the user – insert an answer to the question.
- Enable Case Create Button - enable the checkbox to allow site members to create a case.

Relevant articles

-  Helpdesk Support
 -  Business rules
 -  How do I use Views to manage ticket workflow?

Working with tickets

As an agent, your primary responsibility is to solve your customers' support requests. To do that, you work with tickets, which can arrive in various ways such as via the Help Center request form, directly through email, by telephone and text chat, and from social media such as Twitter and Facebook. The options your customers have for requesting support are called channels. Your account owner or the administrator who set up your Helpdesk Support determines what channels are included.

11 Jun 2020

 More info

 Create a Case
 -  What are triggers and how do they work?
 -  What are the Support default triggers?
 -  What is the difference between automations and triggers?
 -  Accounts

Question Article Links

Connect CD Questions and Knowledge Articles with the help of Question Article Links object.

To create a question article link:

1. Add a lookup field on the Question Article Link object to the Knowledge object.

Go to Setup - Object Manager - Question Article Link object - Field & Relationships - create a new lookup field with a mandatory name - Article.

The screenshot shows the Salesforce Setup interface. The left sidebar has a menu with 'Fields & Relationships' highlighted. The main content area is titled 'Question Article Link' and 'New Relationship'. It shows 'Step 3 of 6: Enter the label and name for the lookup field'. The 'Field Label' is 'Article', 'Field Name' is 'Article', and 'Child Relationship Name' is 'Question Article Links'. The 'Required' checkbox is checked, and the 'What to do if the lookup record is deleted?' option is 'Clear the value of this field. You can't choose this option if you make this field required.' There is a 'Lookup Filter' section at the bottom with a link to 'Tell me more!' and a 'Show Filter Settings' button.

2. Create a custom “Publish Article” button to maintain articles links integrity.

This will update article links (lookup field) automatically when new knowledge article versions are created.

To create and add a custom “Publish Article” button:

- 1) Go to Setup - Object Manager - Knowledge - Buttons, Links, and Actions - New Action:

Action Type - *Lightning Component*

Lightning Component - *acknowltnng:PublishArticleAction*

Label - *Publish Article*

Setup Home Object Manager

SETUP > OBJECT MANAGER
Knowledge

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Knowledge Actions
New Action

Enter Action Information

Object Name: Knowledge

Action Type: Lightning Component

Lightning Component: acknowltnng:PublishArticleAction

Height: 250px

Standard Label Type: --None--

Label: Publish Article

Name: Publish_Article

Description:

Icon: [Change Icon](#)

Save Cancel

2) Add a "Publish Article" action to the Knowledge page layout.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Knowledge

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Knowledge Layout

Save Quick Save Cancel Undo Redo Layout Properties

Quick Find Mobile Action Name

New Case	New Event	New Opportunity	Post	Question	Snapins_Contact_P...
New Community Case	New Group	New Standard Posi...	Printable View	Restore	Submit for Approval
New Contact	New Lead	New Task	Publish	Snapins_Case_Off...	Thanks
New Contract	New Note	Poll	Publish Article	Snapins_Case_Prec...	

Knowledge Sample

Salesforce Mobile and Lightning Experience

Actions

Post Question File Poll Delete Article Change Record Type Assign Archive Delete Draft

Edit Edit as Draft Publish Restore Publish Article

You should be using the custom “Publish Article” button instead of the standard one! It’s needed for Advanced Case Deflection functionality to keep links to the latest knowledge article version on case deflection wizard up to date.

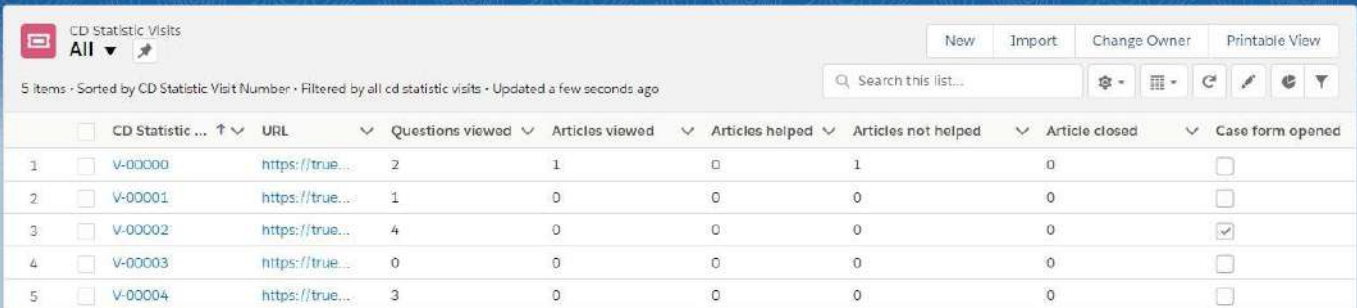
See [how to set up the components and functionality on the site](#) in the section dedicated to site setup.

Case Deflection Analytics

AC Knowledge Management Enterprise package also contains custom objects and tabs for providing CD analytical data.

CD Statistic Visits

CD Statistic Visits is a parent object in a master-detail relationship that serves to summarize collected information from its child objects with the help of Roll-Up Summary fields.



	CD Statistic ...	URL	Questions viewed	Articles viewed	Articles helped	Articles not helped	Article closed	Case form opened
1	☐ V-00000	https://true...	2	1	☐	1	0	☐
2	☐ V-00001	https://true...	1	0	0	0	0	☐
3	☒ V-00002	https://true...	4	0	0	0	0	☒
4	☐ V-00003	https://true...	0	0	0	0	0	☐
5	☐ V-00004	https://true...	3	0	0	0	0	☐

CD Statistic Visits performs records based on the community member page visit and displays the information on CD questions viewed and knowledge articles value.



CD Statistic Visit
V-00002

Related

Details

CD Statistic Visit Number

V-00002

Owner



Arthur Song

URL

<https://truelife-developer-edition.eu17.force.com/com1/s/support>

Questions viewed

4

Articles viewed

0

Case form opened



Articles helped

0

Articles not helped

0

Article closed

0

Case form opened on question

[CDQ-00000](#)

Created By



Arthur Song, 27.02.2020 17:37

Last Modified By



Arthur Song, 27.02.2020 17:38

You can track and analyze information from the CD page visit such as the:

- number of CD questions viewed by a member during a visit
- number of knowledge articles viewed by a member during a visit
- number of articles that helped/did not help
- number of closed articles by a member during a visit
- case form opened - a checkbox that shows if a member opened a "New Case" form during a visit
- case form opened on question - shows a link to the question for which a case form was opened

The information on the article's value is based on the member's votes for CD articles.

It is also possible to enforce voting for community members to collect information on CD articles. You can disable the ability to close the article pop-up window without voting.

AC Case Deflection Wizard ▼ ×

Title

Relevant articles

Top Question Id i

☒ Show knowledge articles field labels

Size of knowledge article popup window

Small ▼

☒ Enable closing of knowledge article popup window without voting

Support page name i

CD Statistic Questions Tracking

Track the progress of the viewed/searched CD Questions based on the community members' visits.

CD Statistic Questions Tracking is a child object for CD Statistic Visits that collects the information on questions viewed by a member during a visit. This information is summarized in the Questions Viewed field of the CD Statistic Visits object.

AC Knowledge

Home

Knowledge Settings

Knowledge

Chatter

Case Deflection Questions

CD

CD Statistic Question Tracking

QT-00073

Related

Details

CD Statistic Question Tracking Number

QT-00073

Question

CDQ-00000

Visit

V-00052

Created By

Lisa Jones, 13.03.2020 15:21

Last Modified By

Lisa Jones, 13.03.2020 15:21

CD Statistic Articles Tracking

Track CD articles' outcome based on the community members' visits.

CD Statistic Article Tracking

AT-00000

Related

Details

CD Statistic Article Tracking Number

AT-00000

Visit

V-00000

Outcome

Article not helped

Article Title

Require Customize Application permission for direct read access to custom settings

Knowledge Article Id

kA01v000000IkS5CAK

Created By

Lisa Jones, 26.02.2020 17:30

Last Modified By

Lisa Jones, 26.02.2020 17:31

CD Statistic Articles Tracking is also a child object for CD Statistic Visits that collects the information on an article's outcome, based on actions (voting and closing articles) performed by a member during a visit. This data is represented on the CD Statistic Articles Tracking by an "Outcome" picklist field with the following values:

- article helped
- article not helped
- article closed

CD Statistic Articles Tracking						
All						
19 items - Sorted by CD Statistic Article Tracking Number - Filtered by all cd statistic articles tracking - Updated a few seconds ago						
Search this list...						
☐	CD Statistic Article ...	Article Title	Outcome	Visit	Created By	Created Date
☐	AT-00000	Require Customize Applicatio...	Article not helped	V-00000	Lisa Jones	26.02.2020 17:30
☐	AT-00001	Article Type Templates	Article helped	V-00006	Sean Forbes	28.02.2020 10:12
☐	AT-00002	Article Type Page Layouts	Article helped	V-00006	Sean Forbes	28.02.2020 10:12
☐	AT-00003	Knowledge Article Types	Article helped	V-00006	Sean Forbes	28.02.2020 10:12
☐	AT-00004	Set up Knowledge Data Categ...	Article helped	V-00006	Sean Forbes	28.02.2020 10:12
☐	AT-00005	Knowledge Feature License	Article helped	V-00011	Rose Gonzalez	28.02.2020 10:51
☐	AT-00006	Article Type Page Layout	Article not helped	V-00011	Rose Gonzalez	28.02.2020 10:51
☐	AT-00007	Knowledge Feature License	Article helped	V-00017	Rose Gonzalez	28.02.2020 11:07
☐	AT-00008	Enable Knowledge	Article helped	V-00017	Rose Gonzalez	28.02.2020 11:07
☐	AT-00009	Knowledge Article Types	Article not helped	V-00017	Rose Gonzalez	28.02.2020 11:07
☐	AT-00010	Guest User Access	Article helped	V-00017	Rose Gonzalez	28.02.2020 11:07
☐	AT-00011	Article Type Page Layout	Article closed	V-00019	Customer Service 1 Site Guest ...	28.02.2020 11:26

The collected information is further summarized in the CD Statistic Visits object records according to the criteria provided in the corresponding Roll-Up Summary fields.

LLM Integration

The AC Knowledge Management Enterprise app integrates with a Large Language Model (LLM) to enhance search, support, and engagement through AI-powered chat. This integration allows users to ask natural-language questions and get accurate, article-linked responses based on your Salesforce Knowledge Base.

Key Capabilities

- Conversational Q&A powered by your Knowledge Base
- Article Suggestions with Direct Links
- Feedback & Rating Options
- Create Case from Chat
- Support for Data Categories and Vector Storage Filters
- Customizable Chat Behavior via Conversation Settings
- Structured Article Upload to Vector Stores (with Mapping)
- Automated Admin Email Alerts for Error Tracking

Integration Setup

To enable LLM-powered responses in AC Knowledge Enterprise, follow the steps below. The LLM used in this integration is OpenAI's ChatGPT. These steps ensure that knowledge articles can be uploaded to the LLM vector database and that the chat component functions as expected.

Step 1: Object Permissions and Field-level Security

Make sure the required permissions are assigned as described [here](#).

Step 2: Enable Article Uploading

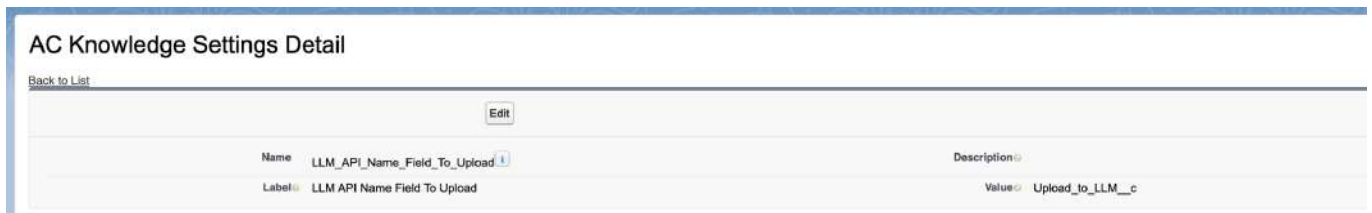
Create an "Upload to LLM" checkbox field on the Knowledge object (or another selected object), and ensure its API name (Upload_to_LLM__c) is specified in the "LLM API Name Field to Upload" custom setting:

Setup → Search for "Custom Settings" in Quick Find

Select AC Knowledge Settings

Click Manage

Edit the LLM_API_Name_Field_To_Upload, and specify: Value: Upload_to_LLM__c



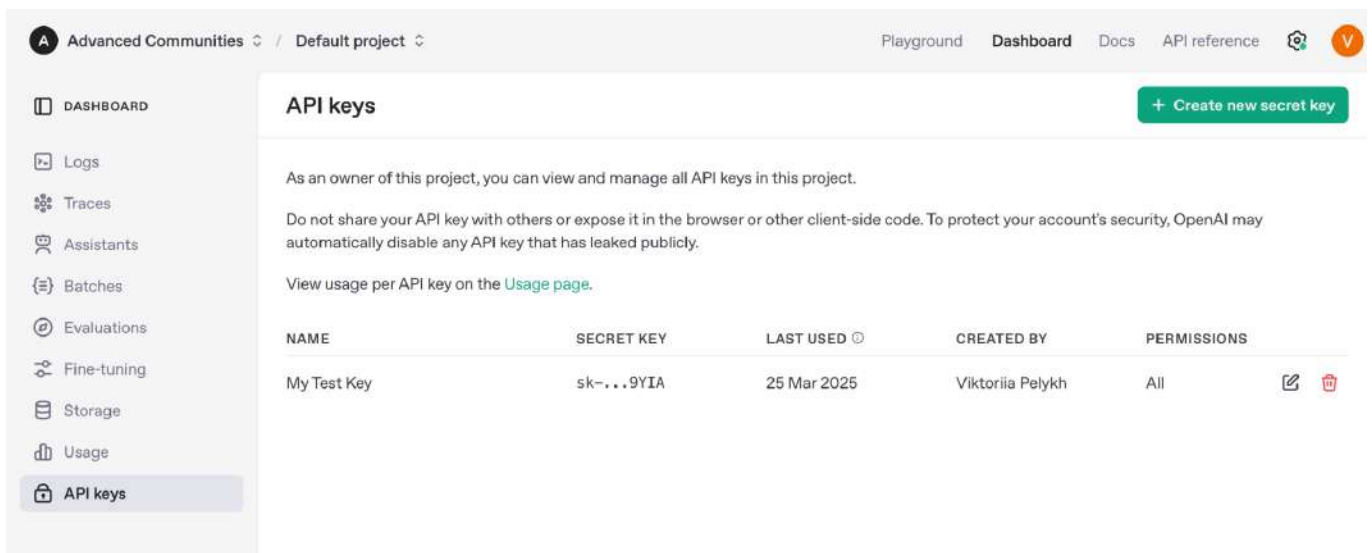
Please ensure that the LLM Articles Export Limit value is set to 10 in Setup → Custom Settings → AC Knowledge Settings → Manage.

This setting controls how many articles are processed at a time during LLM export. A lower value helps avoid platform limits and ensures stable batch performance — especially after enabling the file upload feature in recent versions. Default value may be 1000 in older orgs, which can lead to processing failures.

Grant field-level permissions to admin users as described in the [table](#).

Step 3: Get Your OpenAI API Key

- Sign up or log in at [OpenAI API](#).
- Navigate to Dashboard → API Keys.
- Click “Create new secret key” and copy the generated value.



Step 4: Set Up Named Credential

Go to Setup - Security - Named Credentials → OPEN API NC -> Allowed Namespaces for Callouts -> and add the following value - 'acknowltnng'

External Credential
OpenAI API EC

Client Certificate

oking for?

Callout Options

Generate Authorization Header ⓘ
☒

Allow Formulas in HTTP Header ⓘ
☒

Allow Formulas in HTTP Body ⓘ
☐

Outbound Network Connection ⓘ

Managed Package Access

Created By Namespace ⓘ

Allowed Namespaces for Callouts ⓘ
acknowltng

Next, go to Setup → Named Credentials → External Credentials.

Select the External Credential you'll use to connect to the OpenAI API.
The AC package provides a default credential named **"OpenAI API EC"**, which you can use as-is or replace with a custom one.

SETUP Named Credentials		
Named Credentials	External Credentials	External Auth Identity Providers
1 Items - Sorted by Label		
New		
Label	Authentication Protocol	Actions
OpenAI API EC	Custom	

Open **“OpenAI API EC”**, and under **Principals**, click **“API Principal”** to edit it.

SETUP > NAMED CREDENTIALS

OpenAI API EC Edit Delete

Label: OpenAI API EC Name: acknowltnng__OpenAI_API_EC

Authentication Protocol: Custom

Managed Package Access

Created By Namespace: ⓘ

Related Named Credentials

Label	Name	URL
OpenAI API NC	acknowltnng__OpenAI_API_NC	https://api.openai.com

Principals New

Sequence Number	Parameter Name	Authentication P...	Authentication Status
1	API Principal	1	Unknown

Edit Delete

Custom Headers New

Paste the **OpenAI API key** you obtained in Step 1 into the **Bearer Token** field:

- Click on the 'Add' Authentication Parameters
- Type 'OpenAIAPIKey' in 'Name' field (this value can't be changed)
- Type your bearer token in 'Value' field

Ensure that this External Principal is included in your **permission set**.

Edit Principal

* Parameter Name: * Sequence Number:

* Identity Type:

Authentication Parameters Add

Parameter 1 Delete

* Name:

* Value:

Principal Access

Name	Entity Type	ID
AC_Knowledge_Admins	PermissionSet	0PSAe000002rLZpOAM
AC_Knowledge_Guest_Users	PermissionSet	0PSAe000002rLZtOAM
AC_Knowledge_Community_Users	PermissionSet	0PSAe000002rLZrOAM

Without this step, users (including guest users) won't be authorized to send requests to OpenAI.

Step 5: Create a Vector Storage and set the LLM Default Vector Store ID

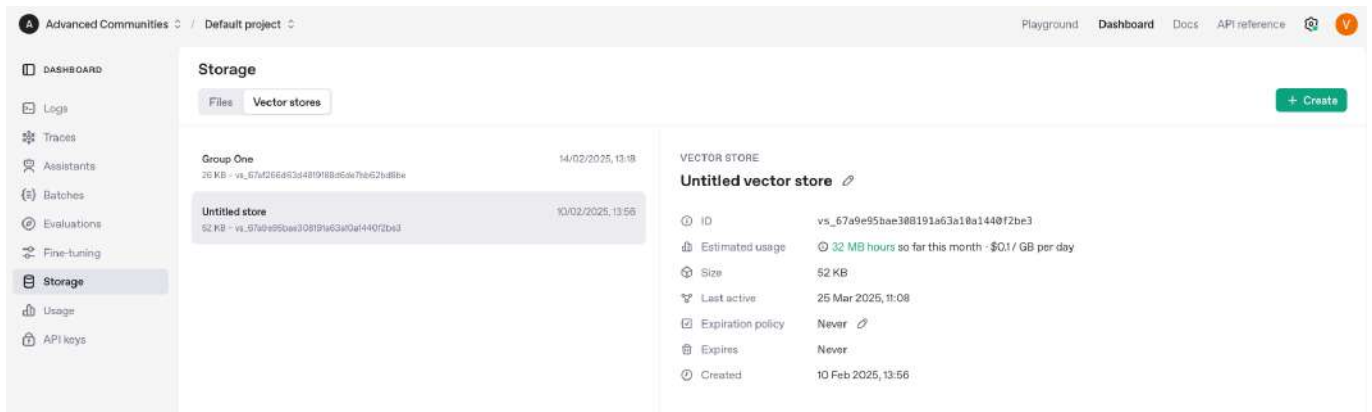
Create a Vector Storage

There must always be one default vector storage that contains the full pool of articles – this is a required step. Once the default storage is created, you can create additional storages if needed (described below).

You can create vector storages either directly on the OpenAI platform or from within the internal Salesforce environment. Both scenarios are described in this section.

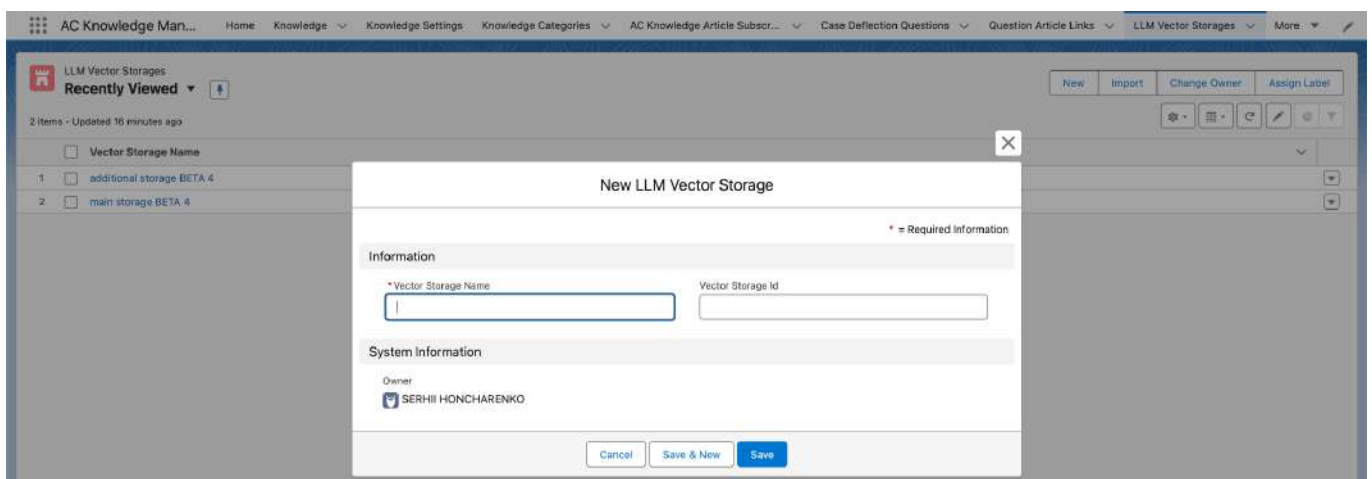
Tip If you don't have any existing vector storages on your OpenAI platform that you'd like to use for this integration, skip directly to Option 2.

Option 1: In the OpenAI Dashboard, navigate to Storage → Vector Stores. Create a new vector store or copy the ID of an existing one.



This ID tells the system where to store and retrieve knowledge embeddings for AI-powered responses.

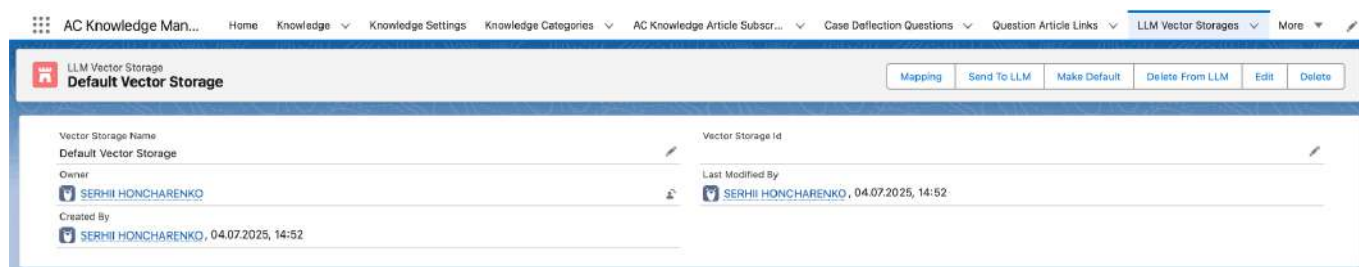
Next, go to the **LLM Vector Storage ID tab** and create a record with the defined ID. Fill in the following fields and save the record:



- **Vector Storage Name**
The internal name of the vector storage in Salesforce. Can be any name.
- **Vector Storage ID**
The external identifier of the vector storage retrieved from the LLM platform (e.g., OpenAI).

Option 2: Create your vector storage directly from the internal Salesforce environment without needing to access the OpenAI platform at all.

To do so, go to the LLM Vector Storages tab, click “New”, and fill in the “Vector Storage Name” with any value. Click “Save”. You’ll see the record created with a blank “Vector Storage ID” value.



Next, click the “Send to LLM” button. This will send the request to the OpenAI platform and fill in the “Vector Storage ID” field automatically.

Mark your Vector Storage as Default

Once the vector storage record is created, open the newly created record and mark the storage as default by clicking the “Make Default” button. This will fill in the [LLM Settings](#) – LLM Default Vector Store ID.

More Details

You’re not limited to a single vector storage – you can create multiple storages based on your use case. For example, you might configure several vector storages and set up mappings (as described in Step 6), allowing the chat component to return responses only for specific data categories by combining vector storage selection with category-based filtering.

Step 6: Configure a Mapping

LLM Mapping enables the categorization of articles based on data categories, allowing articles to be directed to different storage locations. This ensures that the articles are uploaded to the configured storages and that these storages are available for selection within the chat component. By setting up LLM Mapping, admins can ensure that only the relevant content is accessible via the chat component based on specific categories.

Key Fields:

- *Mapping Number (Auto Number)*
Automatically generated unique numbers for each mapping record. It is used to reference each mapping entry.
- *Combined Group & Category Name*
A formula field that combines the data category group name and the data category name to create a full path for the category. This helps identify where each article fits within the hierarchy.

- *Data Category Group Name*
The name of the data category group that classifies related data. This is part of the organizational structure that categorizes articles.
- *Data Category Name*
The specific data category under the selected group.
- *LLM Vector Storage*
The vector storage location where mapped knowledge data is stored. This field creates a relationship between the article and the appropriate storage location where it will be processed by the LLM platform.

Setup Instructions for LLM Mapping:

Enable LLM Mapping in Knowledge Settings

Go to the Knowledge Settings and check the option Enable LLM Mapping to allow categorization of articles based on data categories.

Create LLM Vector Storage

Navigate to the LLM Vector Storages tab and create a new LLM Vector Storage record. Ensure that the Vector Store Id field is populated. If this field is empty, the Vector Storage will not be available for use in the chat component. **Do not** use the default vector storage for that.

Go to Record Page of Created Vector Storage

After creating the LLM Vector Storage record, navigate to the record page. Click on the Mapping button to start the mapping process.

Select Data Categories to Link to Storage

From the Mapping page, select the data categories you want to link to the selected LLM Vector Storage. This ensures that the content is properly categorized and can be retrieved by the LLM component when needed.

Choose the LLM Vector Storage in the Chat Component

In the chat component property, select the configured LLM Vector Storage to make it available for categorizing responses. This links the specific vector storage with the articles that will be used for LLM responses.

Add Additional Data Categories (Optional)

If you need to add more data categories, go to Setup > Data Category Setup and create the new data categories as required. After adding new categories, they will be available for selection in the Mapping process.

Step 7: Select the Field Set for LLM Upload

Go to Knowledge Settings and locate the “LLM Export Field Set” field. Select the Field Set that contains the fields you want to upload to the LLM.

Only the fields included in this set will be processed and embedded into the vector storage. See more details in the Knowledge Settings – [LLM Settings](#) section.

Note The fields included in this Field Set are defined by each organization based on their specific needs. For example, some organizations may choose to include Title, Summary, Article Body, or any custom fields relevant to their use case. There is no required or default list of fields – only the fields included in the selected Field Set will be processed and embedded into the vector storage.

The screenshot displays the 'Knowledge Settings' interface. The top navigation bar includes links for Home, Knowledge Settings (active), Knowledge Categories, AC Knowledge Article Subscr..., Case Deflection Questions, Question Article Links, CD Statistic Visits, and More. Below the navigation bar, there is a banner for 'CD in the Cloud' with a message about community cloud customization. The main content area is divided into several sections: 'General' (Default Knowledge Base Language: English, Enable Multiple Languages Support: unchecked, Knowledge Object API Name: Knowledge, Enable Article Following: checked, Organization-Wide Email Address for Notifications: Select an Option), 'Article List' (Enable Ordering by Custom Date Field: unchecked, Field API Name for Custom Ordering (Date Fields Only): Last Modified Date), 'LLM Settings' (LLM Named Credential: OpenAI_API_NC, LLM Default Vector Store ID: vs_67a9e95bae308191a63a10a144, Enable LLM Mapping: checked, LLM Last Processed Date: "2025-03-18T15:26:57.000Z", LLM Export Field Set: Detail View), 'Reputation Points' (Enable Reputation Points for Article Contributions: unchecked, Experience Cloud Site: Select an Option, Number of Points Given for Article Contributions: 3), 'Article Detail' (Enable Enhanced View of Articles: unchecked, Article Body Field API Name: Select an Option), and 'Logger Settings' (Notify Admin About LLM Integration Issues: unchecked, Email for Integration Issue Alerts: empty, Log Retention Period (Days): 14). The 'LLM Export Field Set' dropdown is highlighted with a green box.

Step 8: Create the LLM Conversation Settings Record

Go to the LLM Conversation Settings tab and create a new record.

Edit Assistant gpt-4

* = Required Information

* Conversation Setting Name

Assistant gpt-4

Output Verbosity ⓘ

--None--

* Model ⓘ

gpt-4o

Reasoning Effort ⓘ

--None--

* Temperature ⓘ

0.10

Instruction

Instruction ⓘ

You are a professional and concise assistant that provides responses exclusively based on the content of uploaded files associated with the assigned vector store.

System Information

Enable Custom Parameters ⓘ

☐

Custom Parameters (JSON) ⓘ

Last Modified By

Admin User, 06/11/2025, 18:01

Created By

Admin User, 06/08/2025, 13:21

Owner

Admin User

Cancel

Save & New

Save

The LLM Conversation Settings tab allows administrators to configure how the AI assistant behaves during chat interactions. You can define tone, style, response formatting, and select the AI model to use. Note: *Turbo* model is recommended for file-based searches, such as searching through articles and attachments

Key configuration options include:

- **Conversation Setting Name:** A required name used to reference the conversation configuration.
- **Instruction:** Long text where you can define specific guidelines for the AI-assistant's responses, such as tone, formatting style, or any restrictions.

- Example Instruction for LLM Conversation:
 “You are a professional and concise assistant that provides responses exclusively based on the content of uploaded files associated with the assigned vector store.
 Restrictions:
 -Do not use external sources, browsing tools, or third-party plugins.
 -Do not speculate. If the requested information is not present in the files, clearly state this.
 -Do not return internal file names (e.g., ka0Qz000000HBS5IAO.json).
 Standards:
 -All responses must be accurate, clear, and aligned with the language of the user’s query.
 -If any of the user’s search terms appear in a document’s title, treat that document as the primary source.
 -When applicable, cite exact excerpts or phrases from the documents.
 -In every response, include a reference to the source link from which the information was taken.”
- *Model*: Select the LLM model that will generate responses. Current supported models include:
 - gpt-4o: The latest OpenAI flagship model with multimodal capabilities (text, image, audio). Offers fast, high-quality, human-like responses. Best for advanced conversational experiences.
 - gpt-4o-mini: A lightweight variant of gpt-4o designed for faster responses with lower compute requirements. Ideal for responsive chat with lower latency.
 - gpt-4-turbo: Optimized version of GPT-4. Offers high performance at lower cost with support for large context windows (up to 128,000 tokens). Recommended for file-based search and complex tasks.
 - gpt-4.5-preview: Experimental version with preview access to upcoming GPT-4.5 features. Useful for testing new capabilities but may be subject to change.
 - gpt-3.5-turbo: A cost-efficient model with good performance for everyday tasks. Ideal for general support interactions that don’t require deep reasoning.
 - gpt-4.1: A balanced and stable GPT-4 variant for production environments. Offers strong accuracy and reasoning at standard token limits.
 - gpt-4.1-mini: Lightweight version of gpt-4.1 that trades off depth for improved speed and responsiveness. Suitable for real-time chat.
 - gpt-4.1-nano: Ultra-light GPT-4.1 variant optimized for speed and minimal resource usage. Best for quick, simple responses in high-traffic use cases.
 - gpt-5: The next-generation flagship model offering state-of-the-art reasoning, generation, and language understanding. Designed for the most demanding AI use cases across enterprise and research.

- gpt-5-mini: A streamlined version of GPT-5 optimized for performance and lower compute cost. Suitable for interactive applications that require fast, smart responses.
- gpt-5-nano: Ultra-efficient GPT-5 variant built for minimal latency and high scalability. Best suited for lightweight, high-volume tasks with concise output requirements.
- gpt-5.1: Enhanced GPT-5 variant offering improved stability, accuracy, and performance for production deployments. Ideal for organizations seeking the latest advancements with predictable behavior (**add manually**).

Note: Turbo is recommended for file-based searches, such as searching through articles and attachments

- *Temperature*: Set the randomness level for responses. Lower values (e.g., 0.01) make replies more focused and deterministic, while higher values (e.g., 0.8) increase creativity. Note: This field is applicable only for GPT-4 and earlier models. For GPT-5 and higher, leave this field empty.
 - Lower values (from 0.01) make responses more factual and focused.
 - Higher values (e.g., 0.8) generate more diverse and creative answers.

To support more granular control when using **GPT-5** and higher models, several new fields have been introduced. These are optional and will only apply if a **GPT-5+** model is selected in the **Model** field.

- *Reasoning Effort*: Controls the reasoning depth used by the AI assistant. Controls the reasoning depth for GPT-5+ models. Applies only to GPT-5 and higher. Leave blank for earlier versions.
- *Output Verbosity*: Determines how concise or elaborate the model's responses should be. Sets output verbosity level for GPT-5+ models. Applies only to GPT-5 and higher. Leave blank for earlier versions.

Note: If either Reasoning Effort or Output Verbosity is populated, the system will ignore the value in the Temperature field.

Optional Fields for Future OpenAI Parameters

- *Enable Custom Parameters*: Enable this option to allow manual configuration of advanced OpenAI parameters (e.g., future features like reasoning depth). When unchecked, the Custom Parameters (JSON) field is disabled.

- *Custom Parameters (JSON)*: Enter a valid JSON object to pass additional OpenAI parameters. Use this only if OpenAI has released new supported fields and you've been instructed to apply them.

These fields are intended for forward compatibility and should only be configured by advanced users familiar with OpenAI API capabilities.

Each Conversation Setting record can later be selected in the [LLM Chat component](#) setup to define how the AI chat behaves for users.

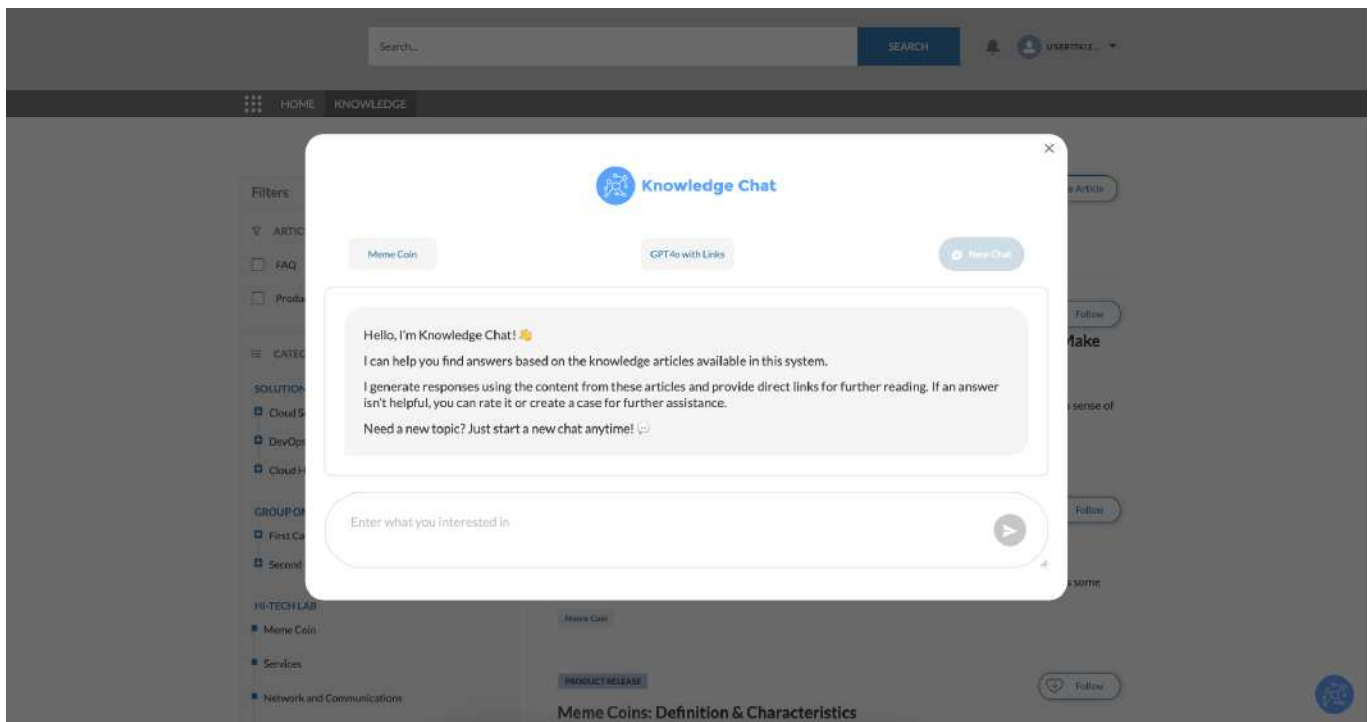
If you wish to allow guest users to access the chat, refer to the [following section](#) to learn how to grant them access.

Chat Component Setup and Behaviour

This “LLM Chat Container” component integrates with LLM to facilitate article-based queries, enabling users to send requests and receive responses. It supports retrieving answers with relevant article links, categorizing search results by topics and conversations, collecting feedback, and creating salesforce cases.

Chat Setup

The component can be placed on both internal and external environments.



The component has the following properties:

LLM Chat Container ⌵ ⬆ ✕

Flow API Name ?

* LLM Conversation Setting Name ?

* LLM Vector Storage Name ?

URL To Article On Site ?

Chat Button Position ?

Chat Button Margin ?

Chat Body Max Height ?

☐ Display Chat as Embedded Component ?

☐ Preserve Chat Session ?

- **Flow API Name:** Contains the API name of the Salesforce Flow used for case creation from the chat
 - Filled in with the default flow API name
 - The flow is evoked by the “Create a Case” button displayed in the chat (the button is hidden if the field is blank)
- **LLM Conversation Setting Name:** Select the LLM conversation to define the response behavior, including instructions, model, and temperature settings
 - Select one of the previously created conversations
 - Once selected, the value is displayed on the UI of the component



Knowledge Chat

All Articles

Assistant1

New Chat

- **LLM Vector Storage Name:** Select the vector storage where files are stored for retrieval and processing by the LLM
 - Select one of the previously created records

- If left blank, the chat searches across all available articles and displays the label “All Articles” in the chat component.



Knowledge Chat



- If a specific vector storage is selected, the chat only searches articles within that storage, and the component displays the name of the selected vector storage instead of “All Articles”.
- **URL To Article On Site:** Define the path to be used for article links redirection (e.g., '/s/article/{0}'). Please provide setup information about if the community uses multiple sites (in this case url link should be added).
- **Chat Button Position:** Select where the floating chat button appears on the screen
 - You can place it in one of the four corners: bottom right, top right, bottom left, or top left.
- **Chat Button Margin:** Defines the spacing around the floating chat button.
 - Use this setting to fine-tune the button’s position on the screen.
- **Chat Body Max Height:** Set max height for the chat body in px.
- **Display Chat as Embedded Component:** Choose how the chat is displayed—either directly on the page or as a floating button.
 - If checked, the chat appears as an embedded component directly on the page.
 - If unchecked, a floating button is shown instead, which opens the chat when clicked.
- **Preserve Chat Session:** If checked, chat history is preserved between sessions. If unchecked, the chat will reset every time a session is started.

Chat Behaviour

The AC Knowledge Chat component provides a conversational interface powered by LLM (OpenAI). Below is an overview of the key behavior and functionality.

Access and Permissions

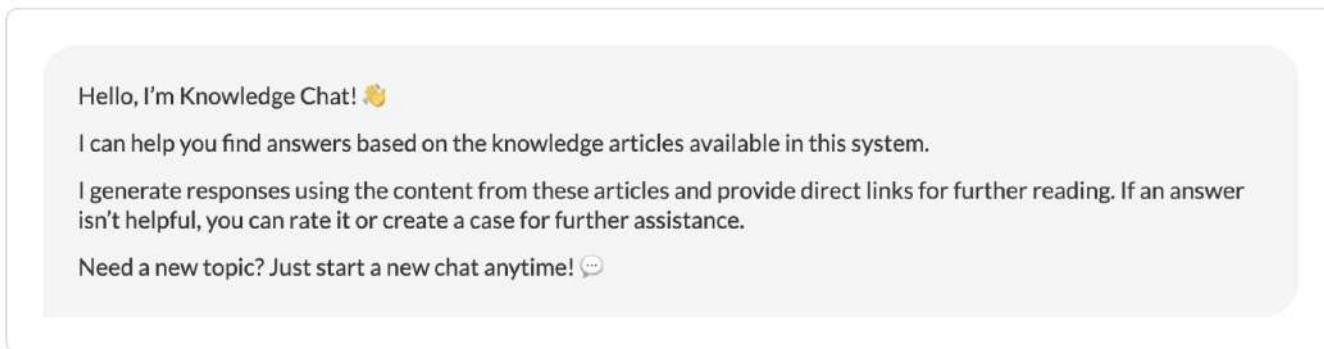
- Only administrators can manage vector storages and conversation settings via the component’s properties.
- End users (including site users and community members) do not have access to modify configuration settings.

- The component is fully supported in both internal Salesforce UI and Experience Cloud sites.

General Chat Functionality

- When the component is launched, it displays a default welcome message to the user:
*"Hello, I'm Knowledge Chat! 🙋
 I can help you find answers based on the knowledge articles available in this system.
 I generate responses using the content from these articles and provide direct links for further reading. If an answer isn't helpful, you can rate it or create a case for further assistance.
 Need a new topic? Just start a new chat anytime! 💬"*

This is a custom label that can be changed according to your needs.



- Clicking the “New Chat” button resets the conversation and clears previous messages.
 Note: Chat history is not saved for end users.



- The chat input field supports standard text input controls:
 Pressing Enter (or Return on Mac) submits the message.
 Pressing Shift + Enter (or Shift + Return on Mac) creates a new line within the same message.
- The chat replies based on instructions defined by the administrator and may include:
 - Direct article links for further reading (if configured via the conversation instruction settings).
 - Attachments related to the referenced articles (if applicable).

- A rating option for user feedback.

How helpful was this conversation?



- A feedback comment box that allows users to share additional context.

Thanks for your rating! Want to leave a comment?

Optional: Tell us more about your experience...

[Skip](#) [Submit Comment](#)

Feedback data is stored internally within the Salesforce org.

- When a new response is generated, the chat automatically scrolls to the beginning of the new message, ensuring users can read the response from the start.
- Case creation
 - Users can escalate a question by clicking the “Create Case” button shown within the chat window.
Admin and Community users can upload files if required (.pdf, .jpeg, .jpg, .png, .odt, .doc, .docx). All the uploaded files are attached to the Case record upon successful form submission.

New Case

* Subject

* Description

Attachments

[Upload Files](#) Or drop files

[Cancel](#) [Save](#)

- This triggers standard Salesforce case creation and links the case to the current user. When a case is created from the chat, it is automatically linked to the corresponding conversation.
See the junction object between Case and LLM Conversation – LLM Conversation Case tab.

Support for Attachment Search

The LLM Chat AI Assistant can search not only through the body of Knowledge Articles but also through their attachments (e.g., PDF, DOCX). This ensures that users receive more complete and accurate answers, even when relevant information is stored in files.

Key Capabilities:

- Semantic Search in Attachments

Attachments uploaded via either the Files related list or the Chatter feed are processed and indexed into the vector store. During a chat interaction, the AI assistant can now retrieve relevant data from both article text and file content. See how to upload attachments through the Chatter [here](#).

- Unified Results with Article Links

Even when an answer is found in a file, the AI assistant provides a link to the associated article using the improved label format:

Example: View: How to Set Up Two-Factor Authentication

- Support Across Environments

Attachment search works in both Experience Cloud sites and internal Salesforce UI.

How It Works (for Admins):

- Knowledge Export Enhancements

When a Knowledge Article is uploaded to the vector store, all its attachments are also exported. Attachments are tracked using the Knowledge_Export__c object as child records linked to the parent article record via Parent_Knowledge_Export__c.

Make sure the LLM_Articles_Export_Limit is set to 10 to ensure reliable export processing without hitting system limits.

- New Object Logic

Each attachment is marked with the type 'Attachment' and inherits the vector storage mapping from its parent article.

- Triggers and Sync

When a new file is attached, a trigger creates a corresponding Knowledge_Export__c record and links it to the article.

If a file is deleted, its export record is marked as Pending Deletion.

If an article is deleted, its attachments are also removed from the vector store.

- Size Limitations

When uploading attachments through the LLM integration, the following size limits apply:

Salesforce limit: Maximum 6 MB per file due to HttpRequest restrictions.

OpenAI platform limit: Maximum 20 MB per file.

Important: If you need to upload a larger file, it must be manually split into smaller parts (each not exceeding 6 MB) before uploading.

Internal View

Note In addition to adding the LLM-powered chat for external users via the Experience Cloud site, the chat also supports internal use directly within Salesforce.

Administrators can access and manage all LLM-related settings, mappings, logs, and conversation records using dedicated tabs inside the Salesforce org.

This section provides an overview of the available LLM administration capabilities, tab by tab.

LLM Conversation Settings Tab

Part of the [Integration Setup](#).

The screenshot shows the 'LLM Conversation Setting' page for 'Assistant gpt-4' in Salesforce. The page has a top navigation bar with tabs: Home, Knowledge, Knowledge Settings, Knowledge Categories, AC Knowledge Article Subscr..., Case Deflection Questions, LLM Conversation Settings (selected), and More. The main content area is divided into several sections:

- Conversation Setting Name:** Assistant gpt-4
- Model:** gpt-4o
- Temperature:** 0.10
- Output Verbosity:** (field with a pencil icon)
- Reasoning Effort:** (field with a pencil icon)
- Instruction:**
 - Instruction: You are a professional and concise assistant that provides responses exclusively based on the content of uploaded files associated with the assigned vector store.
 - Restrictions:
 - Do not use external sources, browsing tools, or third-party plugins.
 - Do not speculate. If the requested information is not present in the files, clearly state this.
 - Do not return internal file names (e.g., kAQZ000000H855IAQ.json).
 - Standards:
 - All responses must be accurate, clear, and aligned with the language of the user's query.
 - If any of the user's search terms appear in a document's title, treat that document as the primary source.
 - When applicable, cite exact excerpts or phrases from the documents.
 - In every response, include a reference to the source link from which the information was taken.
- System Information:**
 - Enable Custom Parameters: (checkbox)
 - Custom Parameters (JSON): (field)
 - Last Modified By: Admin User, 06/11/2025, 18:01
 - Created By: Admin User, 06/08/2025, 13:21
 - Owner: Admin User

The LLM Conversation Settings tab allows administrators to configure how the AI assistant behaves during chat interactions. You can define tone, style, response formatting, and select the AI model to use.

Key configuration options include:

- *Conversation Setting Name*: A required name used to reference the conversation configuration.
- *Instruction*: Long text where you can define specific guidelines for the AI assistant's responses, such as tone, formatting style, or any restrictions.
 - Example Instruction for LLM Conversation:
"You are a professional and concise assistant that provides responses exclusively based on the content of uploaded files associated with the assigned vector store.
Restrictions:
-Do not use external sources, browsing tools, or third-party plugins.
-Do not speculate. If the requested information is not present in the files, clearly state this.
-Do not return internal file names (e.g., ka0Qz000000HBS5IAO.json).
Standards:
-All responses must be accurate, clear, and aligned with the language of the user's query.
-If any of the user's search terms appear in a document's title, treat that document as the primary source.
-When applicable, cite exact excerpts or phrases from the documents.
-In every response, include a reference to the source link from which the information was taken."
- *Model*: Select the LLM model that will be used to generate responses. The following models are currently supported, each offering different capabilities:
 - **gpt-4o**: The latest OpenAI flagship model with multimodal capabilities (text, image, audio). Offers fast, high-quality, human-like responses. Best for advanced conversational experiences.
 - **gpt-4o-mini**: A lightweight variant of gpt-4o designed for faster responses with lower compute requirements. Ideal for responsive chat with lower latency.
 - **gpt-4-turbo**: Optimized version of GPT-4. Offers high performance at lower cost with support for large context windows (up to 128,000 tokens). Recommended for file-based search and complex tasks.
 - **gpt-4.5-preview**: Experimental version with preview access to upcoming GPT-4.5 features. Useful for testing new capabilities but may be subject to change.
 - **gpt-3.5-turbo**: A cost-efficient model with good performance for everyday tasks. Ideal for general support interactions that don't require deep reasoning.

- **gpt-4.1:** A balanced and stable GPT-4 variant for production environments. Offers strong accuracy and reasoning at standard token limits.
- **gpt-4.1-mini:** Lightweight version of gpt-4.1 that trades off depth for improved speed and responsiveness. Suitable for real-time chat.
- **gpt-4.1-nano:** Ultra-light GPT-4.1 variant optimized for speed and minimal resource usage. Best for quick, simple responses in high-traffic use cases.
- **gpt-5:** The next-generation flagship model offering state-of-the-art reasoning, generation, and language understanding. Designed for the most demanding AI use cases across enterprise and research.
- **gpt-5-mini:** A streamlined version of GPT-5 optimized for performance and lower compute cost. Suitable for interactive applications that require fast, smart responses.
- **gpt-5-nano:** Ultra-efficient GPT-5 variant built for minimal latency and high scalability. Best suited for lightweight, high-volume tasks with concise output requirements.
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Note: Turbo model is recommended for file-based searches, such as searching through articles and attachments.

- **Temperature:** Set the randomness level for responses. Lower values (e.g., 0.01) make replies more focused and deterministic, while higher values (e.g., 0.8) increase creativity. Note: This field is applicable only for GPT-4 and earlier models. For GPT-5 and higher, leave this field empty.
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To support more granular control when using **GPT-5** and higher models, several new fields have been introduced. These are optional and will only apply if a **GPT-5+** model is selected in the **Model** field.

- **Reasoning Effort:** Controls the reasoning depth used by the AI assistant. Controls the reasoning depth for GPT-5+ models. Applies only to GPT-5 and higher. Leave blank for earlier versions.
- **Output Verbosity:** Determines how concise or elaborate the model's responses should be. Sets output verbosity level for GPT-5+ models. Applies only to GPT-5 and higher. Leave blank for earlier versions.

Note: If either Reasoning Effort or Output Verbosity is populated, the system will ignore the value in the Temperature field.

Optional Fields for Future OpenAI Parameters

- *Enable Custom Parameters:* Enable this option to allow manual configuration of advanced OpenAI parameters (e.g., future features like reasoning depth). When unchecked, the Custom Parameters (JSON) field is disabled.
- *Custom Parameters (JSON):* Enter a valid JSON object to pass additional OpenAI parameters. Use this only if OpenAI has released new supported fields and you've been instructed to apply them.

These fields are intended for forward compatibility and should only be configured by advanced users familiar with OpenAI API capabilities.

Each Conversation Setting record can later be selected in the [LLM Chat component](#) setup to define how the AI chat behaves for users.

LLM Vector Storages Tab

Part of the [Integration Setup](#).

The LLM Vector Storages tab allows administrators to manage vector storage records that store embeddings of knowledge articles for LLM search and retrieval.

Each vector storage record links your Salesforce Knowledge Base with an external storage system (e.g., OpenAI platform) where article embeddings are maintained.

Key Fields:

- *Vector Storage Name*
The internal name of the vector storage in Salesforce.
- *Vector Storage ID*
The external identifier of the vector storage retrieved from the LLM platform (e.g., OpenAI).

Vector Storage Management Buttons

Use the following buttons on the Vector Storage record page to create, delete, or set a storage as default directly from the UI – no need to navigate to external settings or APIs. These actions simplify the management of your vector storages within Salesforce.

- “Create on LLM” Button

Admins can create a new vector storage directly from the Vector Storage record page.

Behavior: Sends a creation request to the LLM platform and auto-populates the Vector Storage ID field with the returned ID. Displays a success or error toast.

- “Delete from LLM” Button

Enables direct removal of the vector storage from the LLM platform.

Behavior: Sends a deletion request to the LLM platform and shows a success or error toast.

Enabled only if a Vector Storage ID exists.

- “Make Default” Button

Allows admins to set a particular storage as the default without navigating to Knowledge Settings. There must always be one default vector storage that contains the full pool of articles – this is a required step. Once the default storage is created, you can create additional storages if needed.

Behavior: Marks the current vector storage record as the default for uploads and chat behavior.

LLM Mappings Tab

Part of the [Integration Setup](#).

LLM Mapping is used to categorize articles by data categories, directing them to specific storage locations. Once articles are categorized, they can be used within the chat component for LLM responses, ensuring that only relevant knowledge articles are accessible to users.

Can be accessed through the LLM Vector Storages record – Related tab.

Key Fields:

- *Mapping Number*
Automatically generated unique numbers for each mapping record.
- *Combined Group & Category Name*
A formula that combines the data category group name and the data category name to create a full path for the category.
- *Data Category Group Name*
The data category group name that classifies related data.
- *Data Category Name*
The specific data category under the selected group.
- *LLM Vector Storage*
The vector storage where mapped knowledge data is stored. This field creates a relationship between the article and the appropriate storage location.

LLM Knowledge Exports Tab

The LLM Knowledge Exports tab displays the articles that have been uploaded or are scheduled for upload to the LLM platform for use in AI-driven responses.

Each record represents a single article export process, showing the current status, parent article details, and vector storage association.

Key Information:

- *Knowledge Export Number*: Auto-generated number for easy reference.
- *File ID*: The unique file identifier received from the LLM platform after successfully uploading the article.
- *Number of Links*: Displays the number of linked vector storages (child records).
- *Parent ID*: ID of the parent Knowledge record.
- *Parent Knowledge Article ID*: ID of the parent KnowledgeArticle record from Salesforce.
- *Parent Last Published Date*: Date and time the Knowledge article was last published.
- *Parent Title*: Title of the parent article.
- *Status*: Shows the current status of the export process. See Status Descriptions below for details.
- *Vector Store ID*: ID of the vector storage where the article has been stored, if applicable.

Status Descriptions

Each export record has a status that reflects its current stage of processing:

- **Pending Review**: The article existed before the export system was enabled and “Upload to LLM” was not checked. Manual admin review needed.
- **New**: The article is queued for upload during the next scheduled upload job.
- **Uploaded**: The article was successfully uploaded to the LLM platform and received a File ID.
- **Stored in Default Storage**: The article was successfully linked to the default vector storage.
- **Stored in All Mapped Storage**: The article was successfully linked to all configured mapped vector storages.
- **Upload Failed**: The upload process encountered an error. The export attempt was unsuccessful and will not proceed to linking.
- **Linking Failed**: The upload was successful, but the record failed to link to the vector storage(s).
- **File Size Exceeded**: The article or attachment file size exceeded the maximum value defined in the custom setting. It was not uploaded.
- **Max Retries Reached**: The system attempted to upload the file multiple times and failed. The retry limit was reached.
- **Pending Deletion**: The article is scheduled to be unlinked from storages and deleted from the LLM platform during the next deletion run.

- Deleted: The article was successfully deleted from the LLM platform.
- Deletion Failed: Deletion attempt failed, and manual intervention may be required.

LLM Knowledge Export Links Tab

The LLM Knowledge Export Links tab allows administrators to manage the connection between articles and their corresponding vector stores in the LLM platform. This tab provides essential information about the status and linkage of articles for AI-driven knowledge retrieval.

Key configuration options include:

- *Knowledge Export Link Number:*
An auto-generated field that uniquely identifies each knowledge export link. This is a system-generated field for tracking each exported article.
- *Combined Group & Category Name:*
A text field that stores the Data Category Group and Data Category Name associated with the uploaded article. This provides context for organizing and categorizing knowledge exports.
- *LLM Knowledge Export:*
This field links the export record to the parent LLM Knowledge Export record, providing a relationship between the knowledge article and the export process.
- *LLM Mapping:*
A lookup field that establishes a relationship to the LLM Mapping record. This field ensures the proper link between the article and its corresponding vector storage in the LLM system.
- *Status:*
A picklist field that tracks the current status of the integration process with LLM. The available statuses include:
 - New: Article is ready for export but hasn't been processed yet.
 - Linked: Article has been successfully linked to a vector storage on the LLM platform.
 - Deleted: Article was unlinked from LLM platform and is removed.
 - Failed: Article failed to be linked or unlinked from LLM platform.
- *Vector Store ID:*
A text field containing the ID of the vector store in the LLM platform where the article is stored. This field ensures that articles are correctly linked to the appropriate vector storage location in the LLM system.

LLM Conversations Tab

The LLM Conversations tab provides a detailed view of all interactions between users and the AI assistant, storing conversation records, feedback, ratings, and thread information.

Key fields:

- *Conversation Number*
Auto-generated unique number for each conversation, used for tracking purposes.
- *Conversation*
A list of all messages associated with the conversation, including both the user's queries and the AI assistant's responses. This field is used to retrieve past interactions when needed.
- *Conversation Id*
Unique identifier for the AI assistant that handled the conversation, received from the LLM platform. Helps to identify which assistant (or version of the assistant) was used for the conversation.
- *Feedback*
Feedback message provided by the user for the conversation, capturing any comments about the AI assistant's responses.
- *Rating*
Rating of the conversation, typically represented as stars (e.g., 1-5). Allows the user to rate the conversation (usually on a scale of 1-5), providing insights into the effectiveness of the chat.
- *Conversation Setting Id*
A unique identifier for the conversation thread, as provided by the LLM platform.

This tab helps admins manage and review the interaction data between users and the AI assistant, providing a clear history of conversations, user feedback, and ratings.

LLM Messages Tab

The LLM Messages tab stores every individual message sent or received during the AI-powered chat interaction, including user queries and the assistant's responses.

Key fields:

- *Message Number*
Auto-generated unique number for each message, used for tracking purposes.
- *LLM Conversation*
Links each message to its parent conversation record. It is a Master-Detail relationship that connects the message to the specific conversation it belongs to.
- *Message*
The text content of the message, whether it was sent by the user or generated by the AI assistant. This field stores the actual content of the conversation.

This tab helps admins track and manage individual messages from AI-powered interactions, providing insights into both user input and AI assistant responses.

LLM Logs Tab

The LLM Logs tab allows admins to view detailed records of any errors or issues related to the LLM integration. These logs capture information about failed processes, system errors, or other integration-related issues.

Key Features:

- View logs for various LLM processes, including file uploads, conversation creation, and message generation.
- Detailed information on the exceptions, request and response data, and the type of error encountered.

Fields:

- *Log Number:*
A unique identifier for each log record. This is an auto-generated field.
- *Exception Message:*
A field that contains the error message or exception details. This includes messages from the `exMessage` (custom exception).
- *Request Data:*
A field containing the serialized data of the request that caused the error (including HTTP request and body).
- *Response Data:*
A field containing the serialized response data from the system (provides detailed information about the system's response).
- *Type:*
A picklist field that describes the type of exception or error. The values could include options like "Upload Failed", "Conversation Creation Failed", "Run Creation Failed", etc. (see detailed list below).

Type Picklist Values:

- *Upload Failed:*
The system encountered an error while uploading files to LLM.
- *Linking Failed:*
The system failed to link the exported file to LLM storage.
- *Deletion Failed:*
The system was unable to delete a file from LLM storage.
- *Conversation Creation Failed:*
An error occurred while creating an LLM conversation.
- *Thread Creation Failed:*
The system failed to create a new conversation thread.
- *Message Creation Failed:*
An issue occurred while generating or storing a message in an LLM conversation.

- *DML Exception:*
An issue occurred while inserting, updating, or deleting a record during integration with LLM.
- *Unlinking Failed:*
The system failed to unlink the exported file from LLM storage.
- *Run Creation Failed:*
The system failed to create a new Run.
- *Run Status Retrieval Failed:*
The system failed to retrieve the status of a run.
- *AI Response Retrieval Failed:*
The system failed to retrieve the AI response.
- *Knowledge Export Creation Failed*
- *Instance Duplicate*

The LLM Logs are crucial for troubleshooting integration issues, identifying system failures, and ensuring that the system is functioning correctly. Admins can use the log data to track down specific errors and address any failures in the LLM system.

Job Manager Tab

The Job Manager tab offers administrators full control and visibility over all background processes powering LLM integration and other Knowledge-related automations.

It includes the following internal tabs:

- **Scheduler:** Displays and manages all recurring jobs. Each record shows the job name, schedule, and status. You can run, stop, or delete jobs with just a few clicks.
- **Queueable:** Lists all asynchronous queueable processes, including file and article upload queues. This view helps you monitor real-time processing and retry or delete jobs if needed.
- **Batch:** Displays all batch jobs with metrics like batch count, success status, and error rates. This is useful for long-running or high-volume processes like cleanups or exports.

Admins use this tab to ensure the health of article syncing, LLM export queues, and periodic jobs like log reporting and data clean-up — all in one centralized place.

Learn more about scheduled jobs [here](#).

Daily LLM Error Email Summary

To help administrators stay informed without being overwhelmed by frequent notifications, the app includes a daily error summary email for issues related to LLM integration.

- All LLM integration errors are logged in the LLM Logs tab as usual.
- A daily batch job collects errors that occurred within the past 24 hours.
- One email is sent to system administrators listing all new issues.

- After sending, logs are marked to avoid duplicate inclusion in future summaries.
- The feature should be enabled in Knowledge Settings – [Logger Settings](#)

Each error listed in the email includes the following:

- Timestamp – When the issue occurred.
- User Name – Who encountered the issue.
- Exception – The error message or problem encountered.
- Log Link – A direct link to the related log record for investigation.

The following LLM integration issues were detected in your system today:

1. Timestamp: 6/22/2025, 4:27 PM

User Name: SERHII HONCHARENKO

Exception: Failed Records: Try Delete record with empty Platform_OpenAI_File_Id__c.

[View Log](#)

This email is generated once per day to keep you informed about system-level issues affecting LLM functionality. Please investigate and resolve the errors as necessary.

Guest User Access for Chat

To allow guest users to access the LLM chat functionality, follow the steps below to ensure proper configuration.

Create Guest User Sharing Rules for Relevant Objects

To grant guest users access to the necessary LLM objects (such as LLM Conversation Settings, LLM Knowledge Export, and LLM Vector Storage), follow these steps:

- Go to Setup → Sharing Settings
- Scroll to the object's sharing rules section (LLM Conversation Settings, LLM Conversation, LLM Conversation Case, LLM Conversation Feedback, LLM Knowledge Export, LLM Log, LLM Message and LLM Vector Storage)
- Click "New" and create a new sharing rule with the following parameters:
 - Label: Share With Guest Users
 - Rule Name: Share_With_Guest_Users
 - Rule Type: Guest user access, based on criteria
 - Criteria: Owner ID not equal to "Null"
 - Share With: Site Guest User
 - Access Level: Read Only

This will allow guest users to read the data they need for the chat functionality.

Assign Guest User Permission Set with Access to Named Credentials

Ensure that the guest user has access to the Named Credential used for LLM. Here's how to check this:

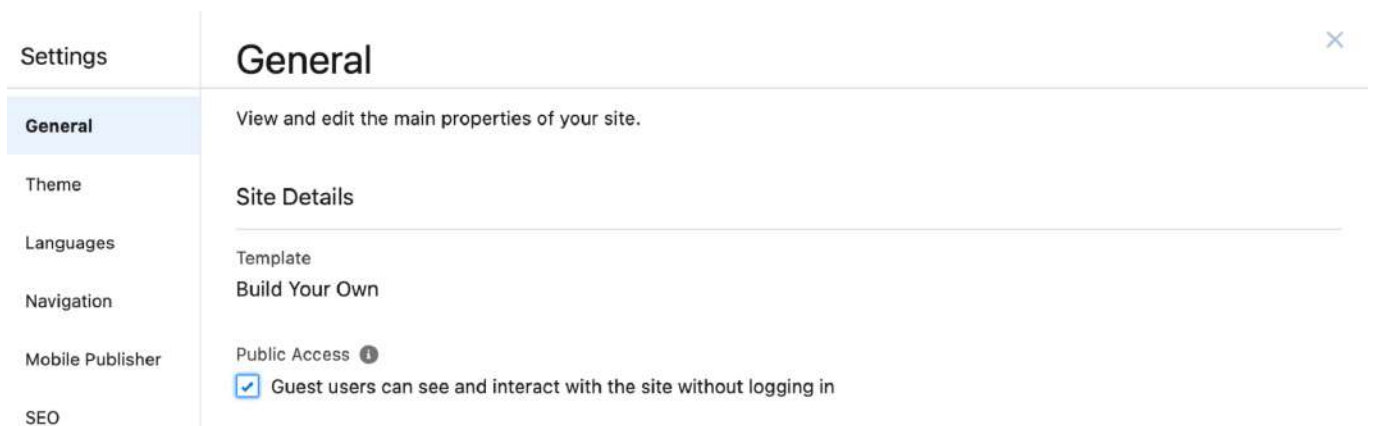
- Go to the Permission Set page.
- Navigate to External Credential Principal Access.
- Choose your credentials to ensure that the guest user has appropriate access to the required named credentials.



Ensure the Site is Public

Check that the site where the LLM chat is embedded is publicly accessible:

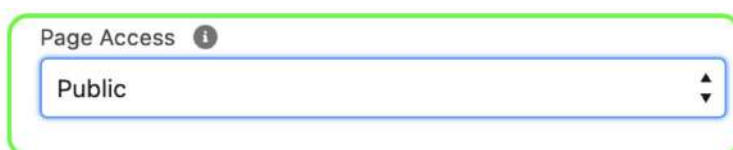
- Go to All Sites > Builder > Settings > General.
- Ensure that Public Access is enabled.



Configure Page-Level Access for Guest Users

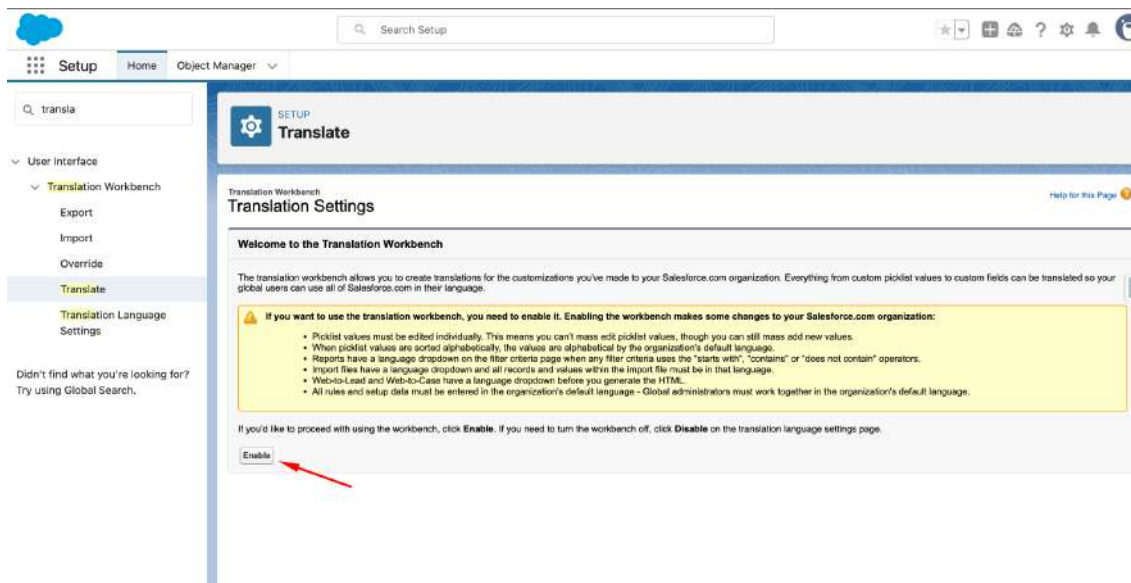
Some pages on the site may have different access levels than the general site. To ensure guest users can access all required pages:

- Go to Site Builder and review the page access settings.
- Ensure that all pages meant to be visible to guest users have “Public” access level.



Update Custom Label for Article Links

To ensure that links to articles in the chat component correctly lead to the site page:
Go to Setup -> Translate -> Enable



To ensure that links to articles in the chat component correctly lead to the site page:

- Go to All Sites > Builder and find the Article page.
- Copy the portion of the URL before :urlName or :recordId.
- Go to Custom Labels and find the value of labelURLToArticleOnCommunity.
- Click on the 'New Local Translations / Overrides button
- Type value from page URL

Search Setup

Setup Home Object Manager

custom la

User Interface

Custom Labels

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

Custom Label

labelURLToArticleOnCommunity (Managed)

This Custom Label is managed, meaning that you may only edit certain attributes. [Display More Information](#)

Local Translations / Overrides (0) Packaged Translations (0)

Custom Label Detail

Short Description It is a URL for redirection to article record

Language English

Namespace Prefix acknowledging

Installed Package AC Knowledge Management Enterprise

Categories LLM

Value /s/article

Created By SERHIL HONCHARENKO, 5/12/2025, 12:34 PM

Modified By SERHIL HONCHARENKO, 5/12/2025, 12:34 PM

Local Translations / Overrides

New Local Translations / Overrides

These translations were created by administrators in your company. Local translations override packaged ones.

No records to display

Packaged Translations

Search Setup

Setup Home Object Manager

custom la

User Interface

Custom Labels

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

SETUP

New Translation

Translation Edit

Save Cancel

Master Label Information

Master Label labelURLToArticleOnCommunity

Master Label Text /s/article

Master Label Language English

Translation Information

Language English

Translation Text /s/example

Save Cancel

Learn More About OpenAI

Please refer to the official documentation if you need to learn more about OpenAI itself

If you'd like to learn more about how OpenAI works – including its models, API usage, and integration capabilities – please refer to the official OpenAI documentation:

<https://platform.openai.com/docs/overview>

This resource provides comprehensive guidance on:

- Available models and their capabilities
- Authentication and API key setup
- Usage limits and pricing
- Request/response formatting
- Best practices for working with the API

We recommend reviewing it if you're managing or extending any part of your LLM integration.

Experience Cloud Site Setup

AC Knowledge Management Enterprise provides customizable lightning components for the community:

- AC Case Deflection Wizard - shows the list of the most searchable questions and relevant articles
- AC Create Article Form - a form to create articles within the community, the usage is optional
- AC Follow Article Button- shows the follow/unfollow button
- AC Follow Article List - displays the list of articles followed by a certain user and allows this user to follow/unfollow the article
- AC Knowledge List - displays the list of articles and a sidebar with groups and categories filtering
- AC Knowledge Advanced Navigation - displays the knowledge categories hierarchy, articles within a certain category in a defined order, and article sections
- AC Knowledge Breadcrumbs - an ordered list that displays the path of a page and helps the user to navigate back to the parent category
- AC Knowledge Category Landing - displays a category landing page that includes a landing content (e.g. image and description) and a list of sub-categories (if exist)
- AC Knowledge Detail - displays article detailed information showing the fields added in a knowledge field set
- AC Knowledge Files - displays a list of files attached through chatter
- AC Knowledge Filters - shows the navigation filters by article type (optional), data groups and categories
- LLM Chat Container - component integrates with LLM to facilitate article-based queries, enabling users to send requests and receive responses.
- AC Jump To Top Button - component designed to enhance user navigation on long pages.

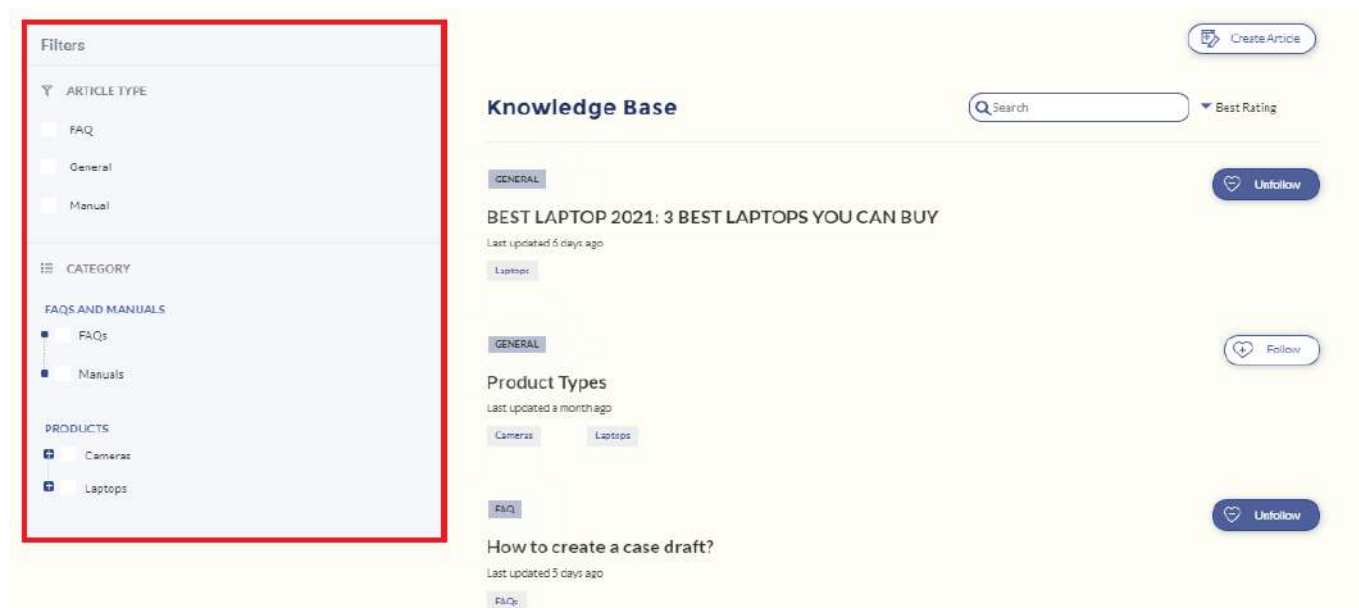
There are two ways that you can set up Knowledge Management in the community depending on your goals and kind of Knowledge Base – Standard Filtering and Advanced Navigation. The main difference is in the Navigation component. You can use the AC Knowledge Filter component to filter articles by groups and categories, but if your Knowledge Base requires strict order (like a guide or manual), we recommend using the AC Knowledge Advanced Navigation.

We suggest two scenarios of configuration. However, AC Knowledge Management Enterprise components and features are completely flexible and can be fully customized and combined according to your needs.

Set up Knowledge Management with standard filtering

The AC Knowledge Management with Standard Filtering allows you to filter articles by article types, groups, and categories. If your knowledge base is big enough and you need to let your site member search through the base and filter existing articles, we recommend using the AC

Knowledge List component with filters.



1. Article List page

Create a new standard community page and add it to the Navigation Menu.

Drag and drop the following components:

- **AC Knowledge List Component**

The component displays the list of articles and a sidebar with groups and categories filtering

AC Knowledge List

Title 

Items Per Page 

Custom Filters FieldSet Name 

☐ Hide component search 

☒ Show Create Article Button 

Filter By Group 

Filter By Category 

Filter By Article Type Ids 

☐ Hide Article Types Filters 

☒ Hide Article Types Labels 

☐ Hide Modify Date 

☐ Show categories checkboxes 

☐ Hide filters section 

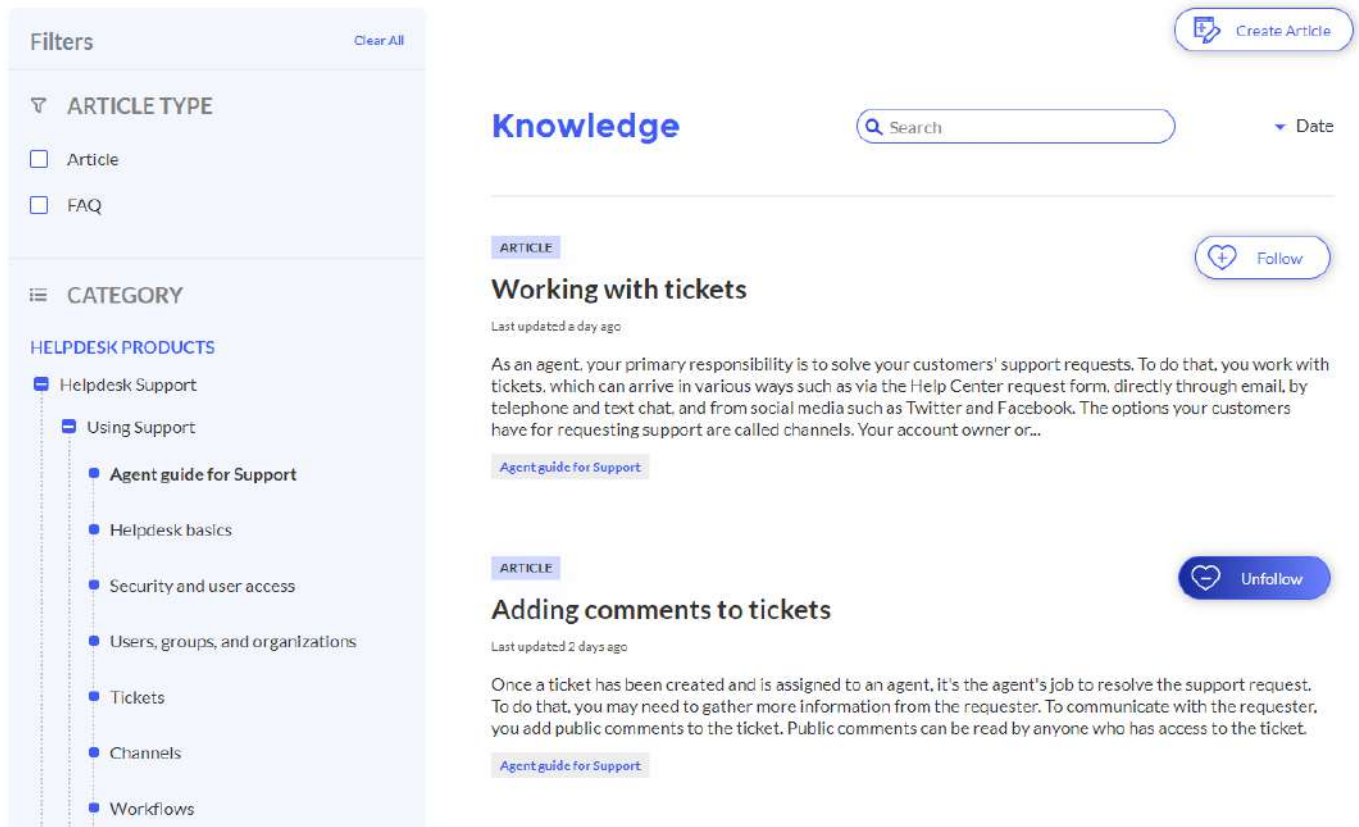
Configure:

- Title - a title for your knowledge base
- Items Per Page - number of items per page
- Custom Filters FieldSet Name - display custom filters by adding a fieldset name
- Hide component search - hide/show the search on the component
- Show Create Article Button - enable/disable Creating Article
- Filter by Group/Category/Article type - copy and insert the knowledge group/category/article type ID to sort articles only by this group/category/article type
- Hide Article Types Filters - enable the checkbox to remove the article type section from filters
- Hide Article Types Labels - article type labels are hidden when the checkbox is ticked
- Hide Modify Date - modify date is hidden when the checkbox is ticked
- Show categories checkboxes on navigation - enable the checkbox to show checkboxes next to the categories
- Hide filters section - enable to display a list of articles with no filters

The categories selection logic is the following:

- the number of categories to check is unlimited

- the logic within one data category group is set to **OR**; this means that articles which belong to at least one of the selected categories will be shown
- if all child categories are selected, the parent one will be selected by default
- for the different data category groups, the logic **AND** works; this means that only articles which belong to each of the selected categories will be shown



2. Article Detail page

You can use the existing Article Detail page with standard community components provided by Salesforce. In this case, you may not provide Field Sets for knowledge as mentioned above and no further steps are needed on this page.

We recommend using an Article Detail page with our custom components provided in the package. This way you will be able to use all the advantages we provide in our custom components, such as breadcrumbs, flexible voting system, enhanced filtering, file attachments, etc.

Add the following components to the page:

- **AC Knowledge Breadcrumbs**

This is an ordered list that displays the path of a page and helps you to navigate back to the parent category (for standard filtering only).

AC Knowledge [dropdown] [X]

Breadcrumbs

Main Knowledge Page [i]

Filter By Group [i]

Filter By Category [i]

Main Knowledge Page – type in a name of the main knowledge site page.

Filter By Group – copy and paste the knowledge data category group name to display breadcrumbs for this group only.

Filter By Category – copy and paste the knowledge category name to display breadcrumbs for this category only

Add the Knowledge page URL to the component properties box.

Knowledge [gear] [refresh]

Pages [X]

Find a page...

MY PAGES

- AC Resource Booking
- Chatter
- Events
- Group 2
- group detail 2
- Knowledge** [dots]
- Members

PROPERTIES | PAGE VARIATIONS [left arrow]

Name [i]

URL [i]

API Name [i]

Page Access [i]

- **AC Knowledge Detail**

The component displays article detailed information showing the fields you added in a knowledge field set.

Configure:

AC Knowledge Detail   

Article Id 

☐ Hide Field Set Labels 

☐ Hide Article Type Label 

☐ Hide Modify Date 

☐ Hide Attachments 

☐ Hide Voting 

☐ Use Thumbs Up/Down Voting 

☐ Show Print Button 

☐ Expand All Collapsed Sections by Default 

Article Id - Leave the default value

Hide Field Set Labels - choose whether to display or not the fields' labels

Hide Article Type Label - choose whether to display or not the article type label

Hide Modify Date - a date when an article was last updated is hidden when the checkbox is ticked

Hide Attachments - attachments are hidden when the checkbox is ticked

Hide Voting - check the checkbox to disable voting for articles.

Use Thumbs Up/Down Voting - star rating is used by default, you can change it to thumbs ups and downs by enabling this feature

Show Print Button - enable the checkbox to let site members save or print out the articles.

Expand All Collapsed Sections by Default - enable to automatically expand all collapsed sections in Knowledge Articles when the page is loaded.

- **AC Knowledge Filters**

Not mandatory. The component shows the navigation filters.

Configure properties:

AC Knowledge Filters ▼ ×

Main Knowledge Page i

knowledge

Custom Filters FieldSet Name i

Filter By Group i

Filter By Category i

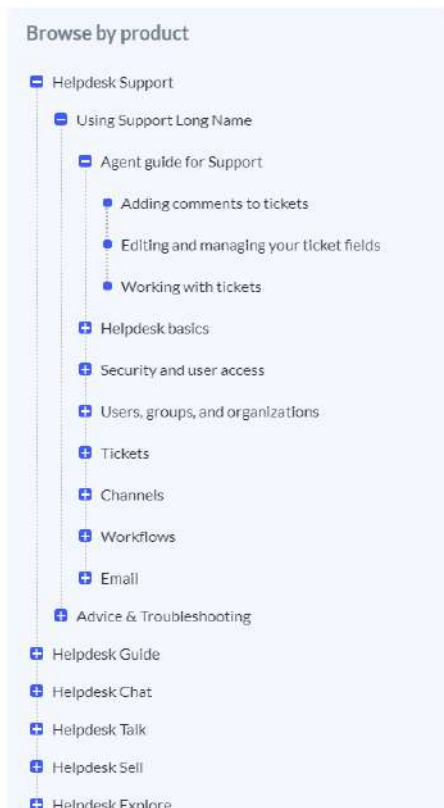
☐ Hide Article Types i

☒ Show categories checkboxes on navigation i

- Main Knowledge Page - add Knowledge page URL
- Custom Filters FieldSet Name - display custom filters by adding a fieldset name
- Filter By Group - paste the knowledge data category group name to sort articles by this group
- Filter By Category - paste the knowledge category name to sort articles by this category
- Hide Article Types - enable the checkbox to remove the article type section from filters
- Show categories checkboxes on navigation - enable the checkbox to show checkboxes next to the categories

Set up Knowledge Management with Advanced Navigation

Knowledge Management with Advanced Navigation allows you to have an ordered navigation through articles and to build up your Knowledge Base in a well-organized and structured way.



Using Support Custom Title



Agent guide for Support

- Adding comments to tickets
- Editing and managing your ticket fields
- Working with tickets

Helpdesk basics

- Helpdesk Support plan types
- Service Incidents at Helpdesk
- Notice for end-users who accidentally reach Helpdesk
- Streamlining your support workflow
- Testing changes in your sandbox (Enterprise)

This type of configuration requires no Article List page.

1. Article Detail page

Add the following components to the page:

- **AC Knowledge Detail**

The component displays detailed article information showing the fields you defined in a knowledge field set.

Configure:

AC Knowledge Detail   

Article Id 

☐ Hide Field Set Labels 

☐ Hide Article Type Label 

☐ Hide Modify Date 

☐ Hide Attachments 

☐ Hide Voting 

☐ Use Thumbs Up/Down Voting 

☐ Show Print Button 

☐ Expand All Collapsed Sections by Default 

Article Id - Leave the default value

Hide Field Set Labels - choose whether to display or not the fields' labels

Hide Article Type Label - choose whether to display or not the article type label

Hide Modify Date - a date when an article was last updated is hidden when the checkbox is ticked

Hide Attachments - attachments are hidden when the checkbox is ticked

Hide Voting - check the checkbox to disable voting for articles.

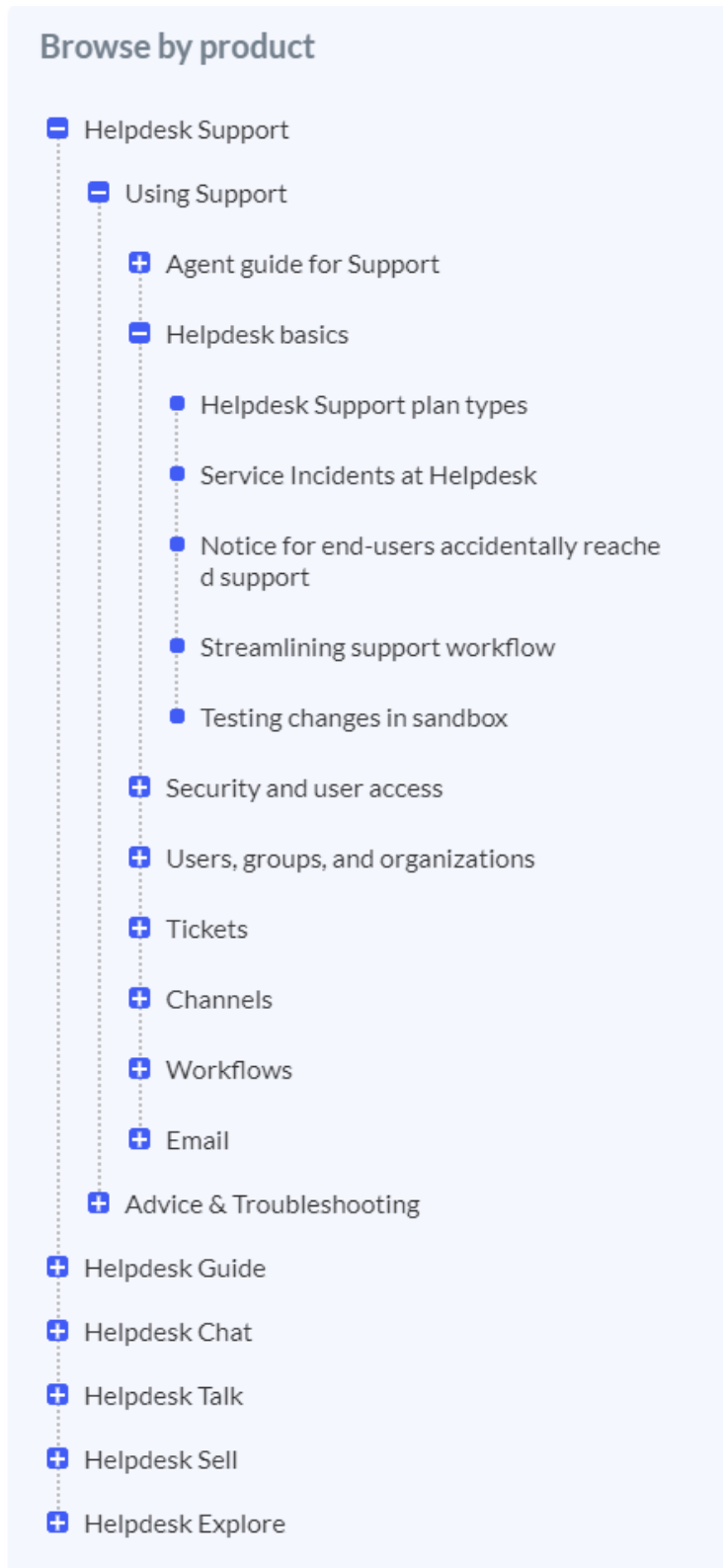
Use Thumbs Up/Down Voting - star rating is used by default, you can change it to thumbs ups and downs by enabling this feature

Show Print Button - enable the checkbox to let site members save or print out the articles.

Expand All Collapsed Sections by Default - enable to automatically expand all collapsed sections in Knowledge Articles when the page is loaded.

- **AC Knowledge Advanced Navigation**

The component displays the knowledge categories hierarchy, articles within a certain category in a defined order, and article sections (if applicable).



Configure:

AC Knowledge Advanced Navigation

Title

Test Title

Article Id

Knowledge Category Id

Category Group Unique Name

Category Unique Name

☒ Support Multibase



Page Name

Article

- Title - type in a title for your product knowledge base to display on the navigation

- Article ID - leave the field blank on article detail page to avoid errors

- Knowledge Category ID

- Category Group Unique Name - enter the name of the group to define what categories to display in your knowledge base

- Category Unique Name - enter the name of the category to define what categories to display in your knowledge base

- Support Multibase - enable the checkbox to support displaying the correct navigation if one article is assigned to different products.

- Page Name - define the name of the page where the component is used at the moment: Article Detail or Knowledge Category page. Choose an appropriate value for each page

Note If you have only one category displayed on your knowledge base, it will automatically expand and show its subcategories.

- **AC Create Article Form**

Allow your site members to contribute to the knowledge base and provide valuable content directly within the site using the AC Create Article Form component.

Home > Laptops



Configure:

AC Create Article Form



Button float

Left

☐ Visible to Partner

☒ Visible to Customer

☐ Visible In Public Knowledge Base

- Button float - choose a position for the "Create Article" button

- Visible to Partner - enable the checkbox to make a button visible for partners and allow partners create articles

- Visible to Customer - enable the checkbox to make a button visible for customers and let customers create articles

- Visible to Public Knowledge Base - enable the checkbox to make a button visible in public knowledge base

2. Knowledge Category page

If you would like to have a Knowledge Category Landing Page, where you can give a brief description of the category information and add an image, create an object page for Knowledge Category.



Add the following components to the Knowledge Category Detail page:

- AC Knowledge Advanced Navigation

To set up the component on this page, set a page type to "Knowledge Category"

Page Name

Knowledge Category

- **AC Knowledge Category Landing**

The component displays a category landing page that includes a landing content (e.g. image and description) and a list of sub-categories (if exist).



In the Properties box, you can specify the Knowledge Category ID.

Optionally, you may also add the AC Create Article Form component to this page.

3. Article Subscriptions page

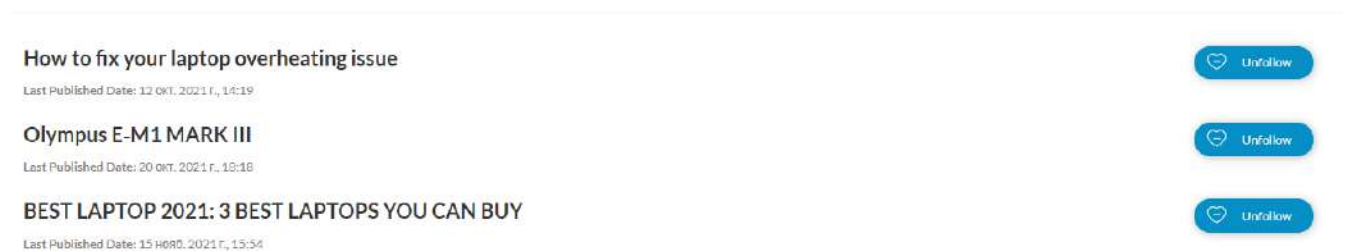
To let community members quickly find and review knowledge articles that they have followed, create a standard community page, and add an [AC Follow Article List](#) component.

This page is used for both types of Knowledge component configuration.

- **AC Follow Article List**

The component displays the list of articles followed by a certain user and allows this user to follow/unfollow the article

Articles subscription



The component has one property:



Title – text field, default value - Articles subscription

See how to set up the [Article Following/Subscription](#) feature.

Use Multibases Feature

Provide your site members separate knowledge bases for your multiple products when using advanced navigation, including the ability to search through each base separately.

Create standard pages for your knowledge bases and add the AC Knowledge Advanced Navigation component.

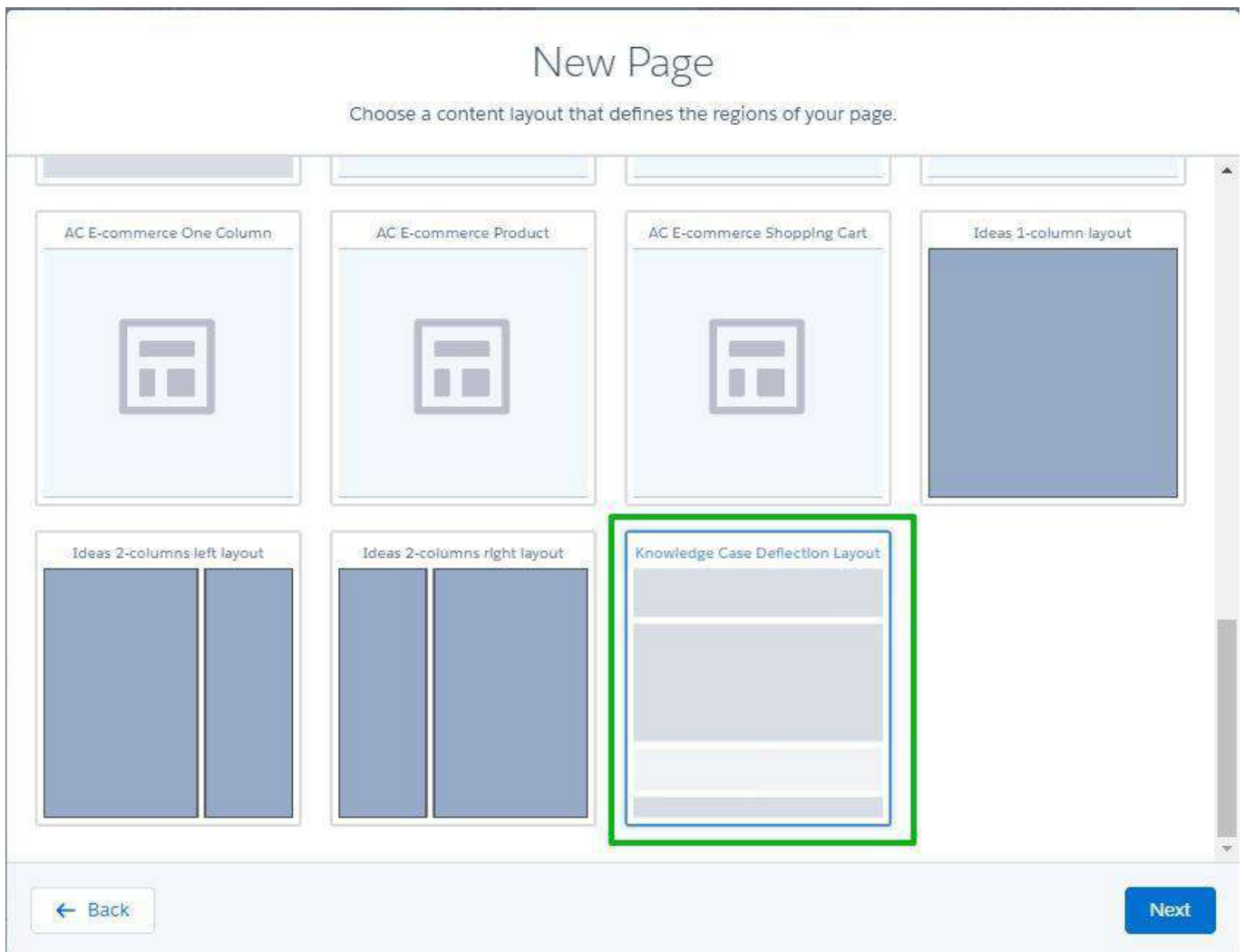
Configure the component's properties and enable the "Support Multibase" checkbox for all bases.



The feature is helpful when you have one article assigned to different data categories which are separate knowledge bases, and you need the article to be displayed in both knowledge bases with the correct navigation tree on the article detail page.

Set up Case Deflection Page

To configure the Knowledge CD feature, create a new standard page using the ready-made "Knowledge Case Deflection Layout" page layout.



Add the following components:

AC Case Deflection Wizard Component

Make sure to add the component to the designated section where its name is displayed.

AC_CaseDeflection
ContactSupportForm

Configure component properties:

AC Case Deflection Wizard ▼ ✕

Title

Relevant articles

Top Question Id ?

☒ Show knowledge articles field labels

Size of knowledge article popup window

Small

☒ Enable closing of knowledge article popup window without voting

Support page name ?

- Title: Label shown at the top of the component
- Top Question ID: Enter the ID of a parent question to display only its related sub-questions
- Show Knowledge Articles Field Labels: Check this box to display field labels (e.g., Title, Summary) in the article view. Leave unchecked for a cleaner layout
- Size of Knowledge Article Popup Window: Choose the size of the article pop-up window (Small, Medium, or Large) based on your typical article length and layout needs
- Enable Closing of Knowledge Article Popup Window Without Voting: Allows users to close the article pop-up without submitting a vote. To enforce voting before closing, uncheck this option
- Support Page Name (Optional): Enter the API name of a custom site page to redirect users when they click Create Case. Leave blank to use the default case creation pop-up

There are two ways to configure case creation for community users on the Knowledge Case Deflection page:

- Redirect to an existing support page
If your community already has a dedicated support page, enter its API name in the Support Page Name property of the AC Case Deflection component. This will redirect users to that page when they choose to create a case.
- Use the built-in case creation pop-up
Alternatively, you can add the standard Contact Support Form component directly inside the pop-up window triggered by the Create a Case button.

Contact Support Form Component

Make sure to add the component to the designated section where its name is displayed.

AC_CaseDeflection

ContactSupportForm

Configure component properties:

Contact Support Form

Let community users create cases using global actions.

> General Settings

Authenticated Users

* Global Action

Snapins_Case_OfflineCaseQuickAct...

Configure global actions for authenticated users

☒ Attach files

File Upload Button Label

Upload File

Guest Users

Global Action

GuestCommunityCase

Configure global actions for guest users

> Style

> Confirmation Text

Case Deflection Page Redirection from Case

To reduce the number of created cases and provide customers with the necessary information, we suggest adding a custom button on the Case List page that will redirect users to the Case Deflection page.

To configure custom “New” case button, do the following:

1. Hide the standard “New” case button by adding the following piece of code to the Theme - Edit CSS:

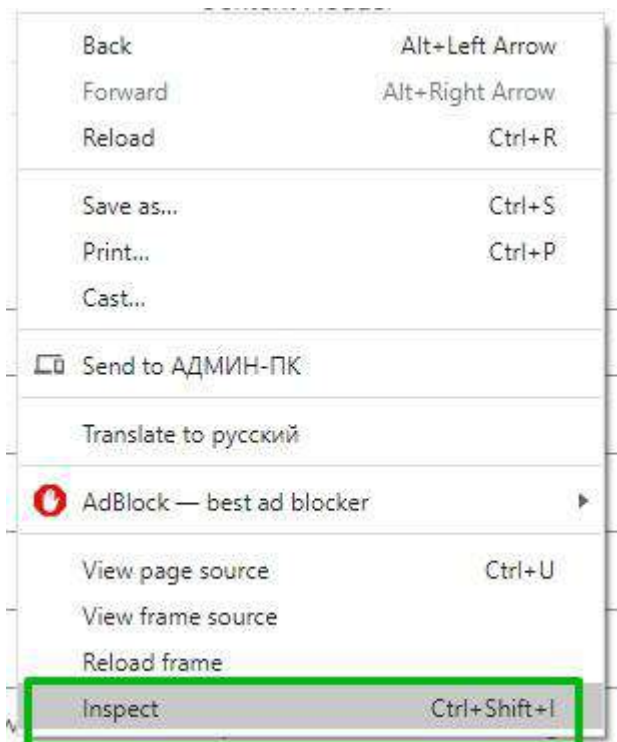
```
.comm-page-list-500 .forceListViewManagerHeader .forceActionsContainer  
a.forceActionLink[title="New"]  
{  
    display: none !important;  
}
```

This works for standard Case object community pages.

Note! If you are using any other page to display the Case List, check the page name within the inspector and change the first part of code to the correct page name.

```
.pageNameFromInspector .forceListViewManagerHeader .forceActionsContainer  
a.forceActionLink[title="New"]  
{  
    display: none !important;  
}
```

Go to the Case List page, right-click and choose Inspect.



Copy the name of the page in the Body tag and class attribute, excluding null in the class and paste into the code.

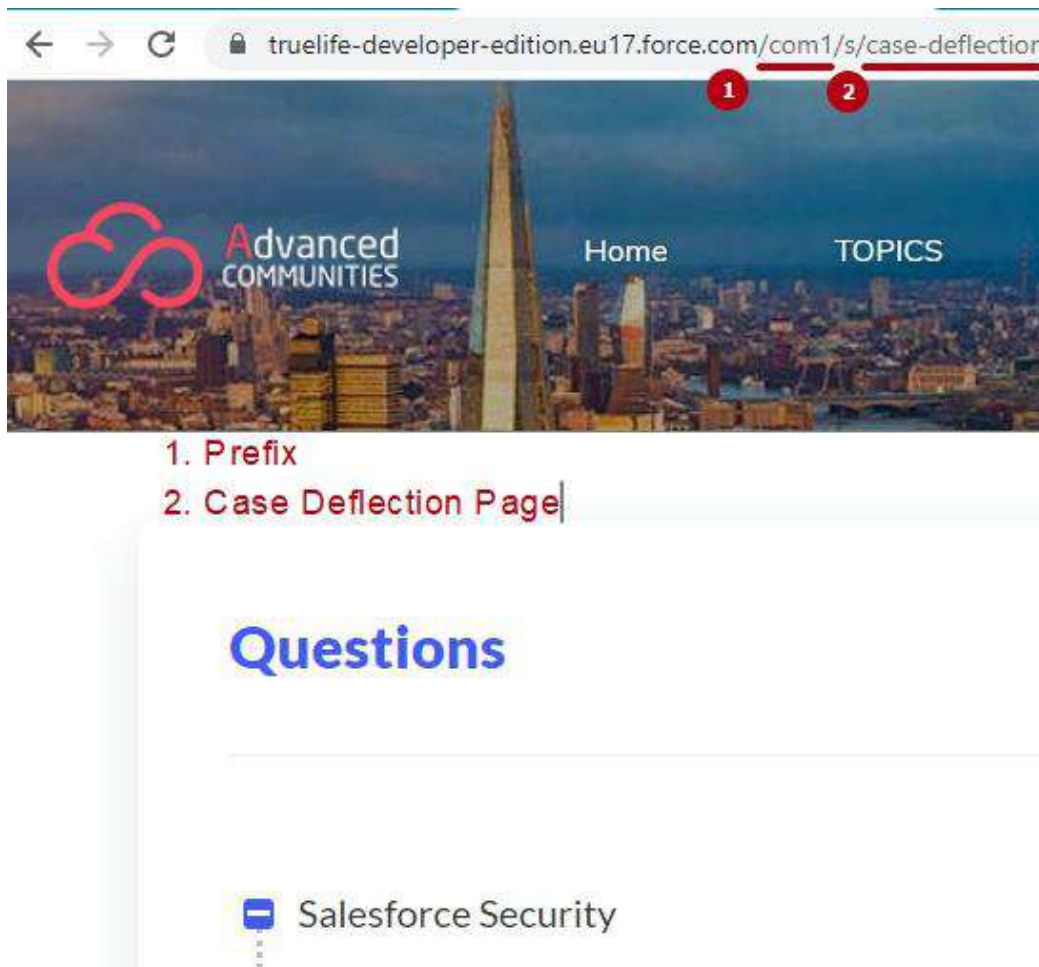


2. Add a custom case button.

Add an HTML Editor standard community component to the Case List page and insert the following piece of code, with YOUR prefix (if exists) and Case Deflection community page URL:

```
<div class="slds-grid slds-grid-align-end">
  <a class="slds-button slds-button--neutral slds-truncate"
    href="/prefix/s/casedeflectionPage">New</a>
</div>
```

Copy the prefix and case deflection community page name in the address bar of this page (not in the community builder) and paste them into the code.



1. Prefix
2. Case Deflection Page

Other Components

Below are the descriptions of components that can be added to any page.

AC Jump To Top Button

This is a floating button component designed to enhance user navigation on long pages. When users scroll down past a certain point, this button appears and allows them to instantly return to the top of the page with a single click.

Configure properties:

AC Jump To Top Butt...   

Button Position 

top 

Button Margin 

medium 

Button Position: Determines where the floating button appears on the screen. Available options: *Top, Bottom, Bottom-Right, Bottom-Left, Top-Right, Top-Left*. Default value: *Top*.

Button Margin: Sets the spacing between the button and the page edge. Options include: *Small, Medium, Large*. Default value: *Medium*.

The button's arrow color is automatically pulled from the builder theme colors to ensure consistent styling. It is round, semi-transparent, and designed to remain unobtrusive while reading. On hover, the button darkens slightly to indicate interactivity.

Softwood Veneer

Species: Most common is Douglas Fir; Pines are available; other softwoods in limited supply. Most softwood veneer is Rotary sliced. Plain sliced softwood veneer and "vertical grain" (quarter sliced) softwood veneer are limited in availability with long lead times and higher prices associated with special orders.

Rotary sliced softwood sheets are typically manufactured in various grades referring to the appearance of the face, back, and interior plies of the sheet and are intended for exterior (with a fully waterproof glue line) or interior (with a moisture resistant, but not waterproof, glue line). Clear faces, free of patches, are not typically available.

Veneer Grain

Grain might not match the grain of solid stock, and it might not accept transparent finishes in the same manner; additional finishing steps might achieve similar aesthetic value.

Figure

It is not a function of a species grade, and special desires must be so specified.

Special Characteristics

Items such as sapwood, heartwood, ribbon stripe, birdseye and comb grain, must be so specified.

Natural

A type of wood species selection. It allows an unlimited amount of heartwood and/or sapwood within a face and is the default selection, unless specified otherwise.

Select Red or White

Means all heartwood or all sapwood, respectively, and must be so specified.

Reconstituted Veneers

Logs that are first sliced into veneer leaves, the leaves may be dyed, then glued under pressure in a mold to produce a large laminated block. The laminated block is then sliced across the glue line to create a faux grain with a designed appearance that is highly repeatable. Not all pre-dyed veneers are colorfast, consult with manufacturer.

- The Jump to Top button becomes visible only after the user has scrolled more than 50% down the page.
- Clicking the button smoothly scrolls the page back to the top.
- The component is responsive and works seamlessly on both internal Salesforce pages and Experience Cloud sites.
- The button does not obscure content.
- On hover, the button visually darkens to signal it is clickable.

This component is useful for enhancing usability on pages with long-form content or extensive scrolling.

Get in Touch

AC Knowledge Management Enterprise is created and maintained by advancedcommunities.com - Experience Cloud experts.

We specialize in Experience Cloud customization, development and consulting.
Feel free to contact us regarding anything related to Experience Cloud.

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