



Salesforce.com: Summer '13

# Public Knowledge Base AppExchange App Guide



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# Public Knowledge Base Introduction

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

## User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

A public knowledge base is one of the channels where you can provide knowledge articles to users or customers. Salesforce.com provides a package on the AppExchange so you can use Salesforce.com Sites to provide a simple public knowledge base using your organization’s existing knowledge base. This unmanaged package includes custom objects, tabs, and Visualforce pages that you can customize based on the needs of your organization.

To install, configure, and customize your public knowledge base with this package:

1. [Install the Public Knowledge Base App.](#)
2. [Create Your Force.com Site for Your Public Knowledge Base](#)
3. [Configure Your Public Access Settings](#)
4. [Configure Your Public Knowledge Base Settings](#)
5. [Enable Your Public Knowledge Base on Facebook \(Optional\)](#)
6. [Enable Your Public Knowledge Base For Mobile Devices \(Optional\)](#)
7. [Enable Featured Articles \(Optional\)](#)
8. [Enter Article Deflection Information \(Optional\)](#)
9. [Enable a Site Map for Search Engine Optimization \(Optional\)](#)
10. [Customize Your Branding \(Optional\)](#)
11. [Test Your Public Knowledge Base](#)

# Install the Public Knowledge Base App

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

## User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

Before installing and configuring Public Knowledge Base, make sure:

- Salesforce Knowledge is set up in your organization. Refer to the [Salesforce Knowledge Implementation Guide](#) for detailed information.
- The Translation Workbench is set up in your organization. See “Setting Up the Translation Workbench” in the Salesforce Help.



**Note:** Public Knowledge Base is not supported nor managed by the provider. This means any customizations you make must be repeated each time a new version is installed.

To install the Public Knowledge Base package:

1. Go to <https://login.salesforce.com/packaging/installPackage.apexp?p0=04tE00000008qar> on the AppExchange and click **Get It Now**.
2. Review the package items and click **Continue**.
3. Review the API access that package components have been granted to ensure they are acceptable.
4. When prompted that the package is ready to be installed, make sure the `Ignore Apex test failures` checkbox is not selected, and click **Install**.

# Create Your Force.com Site for Your Public Knowledge Base

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

## User Permissions Needed

To create a Force.com site: "Customize Application"

Once you install the Public Knowledge Base package, you need to create your Force.com site for Salesforce Knowledge.


To create a Force.com site:


1. Create your site domain, see "The Force.com Domain" in the Salesforce Help.
2. From Setup, click **Develop** > **Sites**.
3. Click **New**.
4. Enter information about your site.
  - Do not name your Site Name "knowledge."
  - Ensure the Active box is checked.
  - For Active Site Home Page, enter `pkb_Home`. If you cloned `pkb_home` and modified the cloned version, enter the name of the cloned Visualforce page.
  - For Site Template, enter `pkb_Template`. If you specify your own custom site template, the template needs to include a body section (see the `pkb_Template` page for reference). This ensures that the article type template (selected when setting up Salesforce Knowledge) displays properly in the public knowledge base.
  - Optionally, for Site Robots.txt, use `pkb_robottxt` to include a site map for search engine optimization.



**Note:** Site Label, Site Name, Site Contact, and Active Site Home Page are required fields.

Field	Description
Site Label	The name of the site as it appears in the user interface.
Site Name	The name used when referencing the site in the SOAP API. This name can contain only underscores and alphanumeric characters, and must be unique in your organization. It must begin with a letter, not include spaces, not end with an underscore, and not contain two consecutive underscores.
Site Description	An optional description of the site.
Site Contact	The user who will receive site-related communications from the site's visitors and salesforce.com.
Default Web Address	The unique Force.com URL for this site. Force.com provides the first part of the URL based on the domain name that you registered; you must add a unique site name to the end. Unless you configure a custom Web address through a

Field	Description
	domain name registrar, this is the URL that the public will use to access your site.
Secure Web Address	The unique Force.com URL for this site when using SSL. The secure Web address is used for SSL even if you defined a custom Web address.
Custom Web Address	<p>The optional branded custom Web address that you registered with a third-party domain name registrar. The custom Web address acts as an alias to your Force.com address.</p> <p>To enable a custom Web address, create a CNAME record to your Force.com domain with that registrar. If you have not registered this address, you encounter an error. Custom Web addresses aren't supported for sandbox or Developer Edition organizations.</p> <p> <b>Note:</b> If you choose to create a branded top-level domain or subdomain through a domain name registrar, the CNAME record that you provide to that registrar must be your Force.com domain name and not the site URL. For example, if you entered <code>www.mycompany.com</code> when registering your domain, the CNAME must be <code>www.mycompany.com.live.siteforce.com</code>.</p>
Active	The option that activates your site when you are ready to make it available to the public. You can also activate your site from the Sites and Site Details pages. When the site is inactive, users will see the page specified in the Inactive Site Home Page field.
Active Site Home Page	<p>The landing page that users are directed to when this site is active. Use the lookup field to find and select the Visualforce page that you developed for your site's home page. Choose the UnderConstruction page if you just want to test your site.</p> <p>For ideas sites, you must use the IdeasHome page and for answers sites you must use the AnswersHome page. The "look and feel" for your Ideas site or Answers site will be inherited from its associated portal unless you select a site template.</p> <p>If you deployed a site before the Summer '10 release, you can set AnswersHome as your default landing page if you create a Visualforce page using <code>&lt;apex:page action="{!URLFOR('/answers/answersHome.apexp')}"/&gt;</code></p>
Inactive Site Home Page	The landing page that users are directed to when this site is inactive. Use the lookup field to find and select the page that you want to use. You can, for example, select a page to indicate that the site is under construction or down for maintenance.
Site Template	The template that provides the page layout and stylesheet for your site. The site template overrides any formatting inherited from the associated portal. Use the lookup field to find and select a template that you've developed, or use the out-of-box template provided.

Field	Description
	 <p><b>Note:</b> The site template specified here is used only for Visualforce pages using the <code>\$\$Site.Template</code> expression.</p>
Site Robots.txt	<p>A file that determines which parts of your public site Web spiders and other Web robots can access. Web robots are often used by search engines to categorize and archive websites. HTML tags are not allowed, as they are not compatible with <code>robots.txt</code> spiders. For Visualforce pages, add <code>contentType="text/plain"</code> to the <code>&lt;apex:page&gt;</code> tag.</p> <p>Example disallowing all robots from indexing all pages:</p> <pre data-bbox="646 646 1380 745">&lt;apex:page contentType="text/plain"&gt;   User-agent: * # Applies to all robots   Disallow: / # Disallow indexing of all pages &lt;/apex:page&gt;</pre> <p>Example allowing all robots to index all pages:</p> <pre data-bbox="646 850 1453 949">&lt;apex:page contentType="text/plain"&gt;   User-agent: * # Applies to all robots   Disallow: # Allow indexing of all pages &lt;/apex:page&gt;</pre>
Site Favorite Icon	<p>The icon that appears in the browser's address field when visiting the site. Use this field to set the favorite icon for your entire site instead of for each page. Changes will be reflected on your site one day after you make them, due to caching.</p>
Analytics Tracking Code	<p>The tracking code associated with your site. This code can be used by services like Google Analytics to track page request data for your site.</p>
URL Rewriter Class	<p>An Apex class to use for rewriting URLs for your site, from Salesforce URLs to user-friendly URLs. With this class, you can make rules to rewrite site URL requests typed into the address bar, launched from bookmarks, or linked from external websites. You can also create rules to rewrite the URLs for links within site pages.</p>
Enable Feeds	<p>The option that displays the Syndication Feeds related list, where you can create and manage syndication feeds for users on your public sites. This field is visible only if you have the feature enabled for your organization.</p>

5. Click **Save**.

# Configure Your Public Access Settings

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

User Permissions Needed	
To edit a Force.com site:	“Customize Application”

Once you create your Force.com site for Salesforce Knowledge, you need to configure your public access settings for the site.

To configure your public access settings:

1. From Setup, click **Develop** > **Sites**.
2. Click the site label of your Force.com site for Salesforce Knowledge.
3. Click **Public Access Settings**.
4. Click **Edit**.
5. In the `Article Type Permissions` section, enable `Read` access on the article types you want to show in your public knowledge base.
6. Click **Save**.
7. Set field-level security for all fields on each of your article types. For each article type:
  - a. In the `Field-Level Security` section, click **View** next to the object that contains the fields to modify. Fields on article types are under the article type name in `Custom Field-Level Security`.
  - b. Click **Edit**.
  - c. Set the field-level security.
  - d. Click **Save**.
  - e. Click **Back to Profile**.
8. On the `Enabled Apex Class Access` related list, click **Edit**.
9. Add `pkb_Controller` to the `Enabled Apex Classes` list and click **Save**.
10. On the `Enabled Visualforce Page Access` related list, click **Edit**.
11. Add `pkb_Home`, `pkb_RSS`, and `pkb_Template` to the `Enabled Visualforce Pages` list and click **Save**.



**Important:** Do not add `pkb_Settings` to the `Enabled Visualforce Pages` list.

12. On the `Data Category Group Visibility Settings` related list, set the visibility value to **All Categories** for each of the category groups you want to show in your public knowledge base. For each category group:
  - a. Click **Edit**.
  - b. In the `Article Category Group Visibility` related list, select **All Categories**.
  - c. Click **Save**.

# Configure Your Public Knowledge Base Settings

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

## User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

Once you configure your public access settings, you need to configure public knowledge base settings, especially your data categories and your supported languages.

Your data categories are your search filters, which help your users find their information efficiently. To update the data category group custom labels:

1. From Setup, click **Create > Custom Labels**.
2. Click **Edit** next to `PKB2_Category_Group_Label_1` enter a value to appear on your public knowledge base.
3. Enter a value to appear as a filter on the left side of your public knowledge base.
4. Click **Save**.
5. Repeat for `PKB2_Category_Group_Label_2` and `PKB2_Category_Group_Label_3`.

To configure your public knowledge base settings:


1. Select the **PKB 2** app from the app menu at the top-right-hand corner of your Salesforce interface.



**Note:** If **PKB 2** is already selected you will not see it in the drop down.

2. Click the **PKB 2 Settings** tab.
3. Click **Create New PKB Settings**. If you’ve already configured your site, select it from the drop down.
4. On the Common set up tab, edit settings for your public knowledge base.

Field	Description
Name	Required. This value must match the API name of the site you are configuring. See the Site Name you chose when <a href="#">creating your site</a> on page 3.
Create Contact and Account	Optional. When checked, a contact and an account are created each time a user submits a question. If the email address is found on another contact, that contact and account are used. When unchecked, all of the submitted data is recorded in the case.
Popular Articles Size	Required. Enter the number of articles you want to display in the Popular Articles section. The recommended maximum value is five to maintain the page structure.
Related Articles Size	Required. Enter the number of recommended articles you want to display when a user is viewing an article. The recommended maximum value is five to maintain the page structure.

Field	Description
Facebook Application ID	Optional. Your Facebook ID for your public knowledge base site.
Multi-Language Enabled?	<p>Optional. Check if you have multiple languages enabled in your knowledge base and want your public knowledge base to support multiple languages as well. Select the languages you want to support. Use the <code>control</code> key on your keyboard to select multiple languages.</p> <p> <b>Note:</b> Enabling multiple languages affects how the article URLs are constructed in your public knowledge base.</p>

5. On the PKB Web set up tab, edit settings for your public knowledge base.

Field	Description
Display Article Summary?	Optional. When checked, the article summary appears with the article in lists, such as a search results and most popular.
Results Page Size	Required. Enter the number of articles you want to display per page of search results. The recommended maximum value is 15 to maintain a visually manageable search results page.
Category Group 1	Optional. Enter a data category group's unique name. The data category group's name is displayed under <code>Narrow Search</code> on your public knowledge base home page.
Root Category 1	Required if <code>Category Group 1</code> is specified. This field specifies which data categories are included in the drop down under <code>Category Group 1</code> in the <code>Narrow Search</code> section of your public knowledge base home page. Enter <code>All</code> if you want every category in the category group to appear. Enter a specific category name to include it and all its subcategories.
Category Group 2	Optional. Enter a data category group's unique name. The data category group's name is displayed under <code>Narrow Search</code> on your public knowledge base home page.
Root Category 2	Required if <code>Category Group 2</code> is specified. This field specifies which data categories are included in the drop down under <code>Category Group 2</code> in the <code>Narrow Search</code> section of your public knowledge base home page. Enter <code>All</code> if you want every category in the category group to appear. Enter a specific category name to include it and all its subcategories.
Category Group 3	Optional. Enter a data category group's unique name. The data category group's name is displayed under <code>Narrow Search</code> on your public knowledge base home page.
Root Category 3	Required if <code>Category Group 3</code> is specified. This field specifies which data categories are included in the drop down under <code>Category Group 3</code> in the

Field	Description
	Narrow Search section of your public knowledge base home page. Enter All if you want every category in the category group to appear. Enter a specific category name to include it and all its subcategories.



**Note:** The values entered in the `Category Group` fields must exactly match a data category group's unique name. To find a data category group's unique name:

- a. From Setup, click **Customize > Data Categories**.
- b. Double-click the category name.

6. Click **Save**.

# Enable Your Public Knowledge Base on Facebook (Optional)

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

## User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

You can deploy the Public Knowledge Base package on Facebook so that customers can access your public knowledge base from your Facebook page.

To enable your public knowledge base on Facebook, first create a new site in Salesforce.

1. Select the **PKB 2** app from the app menu at the top-right-hand corner of your Salesforce interface.



**Note:** If **PKB 2** is already selected you will not see it in the drop down.

2. Create a new site by following the steps in [Create Your Force.com Site for Your Public Knowledge Base](#) on page 3. Enter these values for your new site:
  - For `Active Site Home Page` enter `pkb_Home_fb`.
  - Ensure the `Active` box is checked.
  - For `Site Template` enter `pkb_Template_fb`.

Next, set up a page in Facebook to display your public knowledge base.

1. Log on to <https://developers.facebook.com/apps> with your Facebook credentials.
2. Click **Create new app** and follow the Facebook instructions.
3. Select **Page Tab** to open the Page Tab collapsible section.
4. Enter your new site’s URL for both `Page Tab URL` and `Secure Page Tab URL`. To find your new site’s URL go to your Salesforce account, from **Setup**, click **Develop > Sites**, and copy the URL in the `Site URL` column for your new site.
5. Select `Wide` for `Page Tab Width`.
6. Save your changes.
7. If needed, create a Facebook page. Go to **Settings > Advanced** and click **Create Facebook Page** at the bottom of the page. To publish the page, click **publish this page** in the `This page has not been published` warning.
8. Select the Facebook page you want to deploy your public knowledge base.
9. Use the following URL with your app id for `[YOUR_APP_ID]`.

`https://www.facebook.com/dialog/pagetab?app_id=[YOUR_APP_ID]&next=http://facebook.com`

10. Click **Add Page Tab**.

11. Select your application where you want to add your knowledge base page. Click your public knowledge base tab to see it embedded within Facebook.

Finally, set your Facebook ID for your site.

1. Go to your Salesforce account.
2. Select the **PKB 2** app from the app menu at the top-right-hand corner of your Salesforce interface.



**Note:** If **PKB 2** is already selected you will not see it in the drop down.

3. Click the **PKB 2 Settings** tab.
4. In the `Select Settings to Edit` drop-down select your new site.
5. On the `Common set up` tab, enter your `Facebook Application ID`.
6. Click `Save`.

## Enable Your Public Knowledge Base For Mobile Devices (Optional)

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

### User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

You can enable the Public Knowledge Base package so that customers can access your public knowledge base from their mobile devices.

First, add `pkb_mobile` to your site’s Visualforce Pages list.

1. From Setup, click **Develop** > **Sites**.
2. Click the site label of your Force.com site for Salesforce Knowledge.
3. In the Site Visualforce Pages section, click **Edit**
4. From the Available Visualforce Pages list select `pkb_mobile` and add it to the Enabled list.
5. Click **Save**.

Next, set user access as appropriate for your public knowledge base.

1. From Setup, click **Develop** > **Sites**.
2. Click the site label of your Force.com site for Salesforce Knowledge.
3. Click **Public Access Settings**.



**Note:** The steps to set access differ depending on how you’ve granted access (by roles, permissions, or profiles).

4. Enable `Read` and `Create` access to the `Accounts`, `Cases`, and `Contacts` objects.
5. Enable `Read`, `Create`, `Edit`, and `View All` access to `PKB Article Deflection`.
6. Enable any other access necessary for your public knowledge base.
7. Click **Save**.

Next, add the customer emoticon and customer geolocation fields to your case page layout.

1. From Setup go to **Customize** > **Cases** > **Page Layouts**
2. Select your case page layout.
3. Drag the desired fields into your page layout.
4. Click **Save**.

Finally, enable mobile access to your public knowledge base.

1. Select the **PKB 2** app from the app menu at the top-right-hand corner of your Salesforce interface.



**Note:** If **PKB 2** is already selected you will not see it in the drop down.

2. Click the **PKB 2 Settings** tab.
3. In the `Select Settings to Edit` drop-down select your site.
4. Select the **PKB Mobile set up** tab.
5. In **General Setup**, enter the amount of articles to display on the **Results** and **Contact Results** pages.
6. In **Data Categories**, enter your categories as you did on the **PKB Web** tab.
7. Optionally, in **Contact Us**, enable the contact us form and define how many attachments users can upload.
8. Optionally, in **Phone calls**:
  - Enable the call functionality.
  - Provide your support number.
  - If your support center is not available 24/7, enter your **BusinessHours** record name.
  - For **CTI** integration, enable **Add Case Number**.
9. Optionally, enable **Live Agent**.
  - a. Create a **Live Agent** deployment. Refer to the [Salesforce online help](#) for detailed information.
  - b. Check **Live Agent Chat Enabled**.
  - c. Enter your **Live Agent** chat button ID. You can find this in the address bar of the chat button's detail page. For example, a chat button's detail page with the URL: `https://mycompanyonsalesforce.com/: 573x00000004EPT` has an ID of: `: 573x00000004EPT`.
  - d. Enter your **Live Agent** deployment ID. You can find this in the address bar of the deployment's detail page. For example, a deployment's detail page with the URL: `https://mycompanyonsalesforce.com/572x00000004EPR` has an ID of: `572x00000004EPR`.
  - e. Enter your **Live Agent** deployment URL. You can find this in the **Deployment Code** section of the deployment's detail page. It is the URL found after `src='` in the code text.
  - f. Enter your **Live Agent** chat server URL. You can find this in the **Deployment Code** section of the deployment's detail page. It is the URL found after `liveagent.init('` in the code text.
10. Click **Save**.

## Enable Featured Articles (Optional)

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

### User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

The featured articles functionality prominently displays specific articles that you identify as featured in the search results. The articles can be displayed by default when the user first accesses your public knowledge base search page or after the user searches on specific keywords.


To enable featured articles:

1. Select the **PKB 2** app from the app menu at the top-right-hand corner of your Salesforce interface.



**Note:** If **PKB 2** is already selected you will not see it in the drop down.

2. Click the **PKB Featured** tab.
3. Click **New**.
4. Edit settings for a featured or recommended article in your public knowledge base.

Field	Description
Article Number	<p>Required. Enter the article number of the article that you want to appear as a featured article.</p> <p> <b>Note:</b> The article number can be found with the article on the Article Management or Article tabs. You may need to add the column to the list view.</p>
PKB Name	<p>Required. This value must match the API name of the site you are configuring. See the Site Name you chose when <a href="#">creating your site</a> on page 3.</p>
Order	<p>Optional. Specifies where this article appears in the list of featured or recommended articles.</p>
Owner	<p>Auto-populated. This field displays the owner of this featured article record, not the owner of the article.</p>
Keyword	<p>Optional. Enter the keywords that, if searched, include this article at the top of the search results. If no keywords are entered, then this article is displayed when the user first accesses your public knowledge base search page.</p>

Field	Description
Featured Expiration	Optional. Enter the date after which the article no longer appears as a featured articles. An empty value means the article has no expiration date. This field does not apply if the <code>Is Keyword Article?</code> field is checked.
Is Keyword Article?	Optional. When checked, this article appears as a recommended article whenever the keywords specified on this record are searched. It does not appear as a featured article.

5. Click **Save**.

## Enter Article Deflection Information (Optional)

Available in: **Enterprise, Developer, and Unlimited** Editions

### User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

Collecting feedback and case deflection information for article is a powerful metric for your public knowledge base. The PKB Article Deflection tab allows you to track how well an article is received by your users and how often it prevents the creation of a case. A new custom object with article feedback is logged on this tab each time a user clicks the feedback options on an article. This data can be reported on to track deflections and feedback from customers.

Field	Description
Article Title	The article title of the article for which feedback and case deflection information was recorded.
Article Number	The article number of the article for which feedback and case deflection information was recorded.
Contact	The person or organization providing the feedback. This is only available if support was contacted.
Comments	Any comments made on the article.
Deflection	If checked, favorable feedback was made on the article or the article allowed a user to close a case: the article deflected a case.
Keyword Searched	The keywords the user searched before entering feedback or deflecting a case.
Channel	How the feedback was submitted: web or mobile.
Feedback Source	How the feedback was collected: <ul style="list-style-type: none"> <li>• Contact Us</li> <li>• Search</li> <li>• Related Article</li> </ul>
Owner	This field displays the owner of this article deflection record, not the owner of the article. You can change the owner on the PKB Article Deflection detail page.
Article ID	The article identification so you can view the article as the user viewed the article.
Session ID	The session identification so you can view the user’s session prior to entering feedback or deflecting a case.

You can also manually enter feedback.

1. Select the **PKB 2** app from the app menu at the top-right-hand corner of your Salesforce interface.



**Note:** If **PKB 2** is already selected you will not see it in the drop down.

2. Click the **PKB Article Deflection** tab.
3. Click **New**.
4. Enter feedback and case deflection information for an article.
5. Click **Save**.

## Enable a Site Map for Search Engine Optimization (Optional)

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

### User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

You can add a site map on your public knowledge base for search engine optimization.

Add `pkb_robottxt`, `pkb_siteMapIndex`, and `pkb_sitemap` to your site’s Visualforce Pages list.

1. From Setup, click **Develop** > **Sites**.
2. Click the site label of your Force.com site for Salesforce Knowledge.
3. In the Site Visualforce Pages section, click **Edit**
4. From the Available Visualforce Pages list select `pkb_robottxt`, `pkb_siteMapIndex`, and `pkb_sitemap` and add them to the Enabled list.
5. Click **Save**.
6. Click **Edit** at the top of your site’s detail page.
7. In `Site Robots.txt`, enter `pkb_robottxt`.
8. Click **Save**.

## Customize Your Branding (Optional)

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

### User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

You can change your public knowledge base’s branding by customizing:

- [The static resources \(such as logos\)](#)
- [The cascading style sheet \(CSS\)](#)
- [The Visualforce pages.](#)



**Warning:** In the future, salesforce.com may release updated versions of the Public Knowledge Base package. The more you customize your public knowledge base, the harder it is to upgrade to new versions because you need to re-implement your modifications. As you decide how much of the public knowledge base to customize, consider the trade-offs between customizability and upgrade costs. The more customized your site is, the more work it is to upgrade the site to the latest version of the package.

## Customize the Static Resources (Optional)

Available in: **Enterprise**, **Developer**, and **Unlimited** Editions

### User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:



**Warning:** In the future, salesforce.com may release updated versions of the Public Knowledge Base package. The more you customize your public knowledge base, the harder it is to upgrade to new versions because you need to re-implement your modifications. As you decide how much of the public knowledge base to customize, consider the trade-offs between customizability and upgrade costs. The more customized your site is, the more work it is to upgrade the site to the latest version of the package.

To customize the static resources:

1. From Setup, click **Develop** > **Static Resources**.
2. Click **Edit** next to the static resource you want to change.
3. In the `File` field, click **Browse...**

4. Select a new file of the same file type and click **Open**.
5. Click **Save**.

**Tip:**

- `pkb_logo` is the salesforce.com logo. To replace it, upload a small .png image (about 100 pixels).
- `pkb_search_icon` is the blue search button.

## Customize the Cascading Style Sheet (Optional)

Available in: **Enterprise, Developer, and Unlimited** Editions

### User Permissions Needed

To clone and create Visualforce pages and components: “Customize Application”



**Warning:** In the future, salesforce.com may release updated versions of the Public Knowledge Base package. The more you customize your public knowledge base, the harder it is to upgrade to new versions because you need to re-implement your modifications. As you decide how much of the public knowledge base to customize, consider the trade-offs between customizability and upgrade costs. The more customized your site is, the more work it is to upgrade the site to the latest version of the package.

To customize the Cascading Style Sheet (CSS):

1. From Setup, click **Develop > Components**.
2. Click **pkb\_css**.
3. Click **Clone**.



**Note:** We recommend cloning **pkb\_css** and making your changes to the newly cloned file. This prevents your style sheet changes from being overwritten if you upgrade the Public Knowledge Base package in the future.

4. Change the `Label` and `Name` of the cloned style sheet.



**Note:** The `Label` and `Name` can be the same, but they must be different than other components.

5. Optionally, update the `Description` as well.
6. Make your changes to the cloned style sheet.



**Note:** Complex style sheet and Javascript changes that modify the spacing and layout of your site (such as adjusting the font size, page margins, and padding of objects) require you to re-test your site after you install any new version of the Public Knowledge Base package. Testing your site helps ensure that your complex styles heet and Javascript changes are compatible with the new features and changes available in the new package.

7. Click **Save**.
8. From Setup, click **Develop > Pages**.
9. Click **Edit** next to the **pkb\_Template** page.
10. Replace `pkb_CSS` with the name of your cloned style sheet. If you're deploying for [mobile devices](#), you can update `pkb_mobile_css`.
11. Click **Save**.

## Customize the Visualforce Pages (Optional)

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### User Permissions Needed

To clone and create Visualforce pages and Apex classes: "Customize Application"



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To customize your site beyond what is supported by the CSS and static resources, you can modify the Visualforce pages (`pkb_Home`, `pkb_RSS`, `pkb_Settings`, and `pkb_Template`) and Apex controller (`pkb_Controller`) that came with the Public Knowledge Base package. However, we recommend you make copies of these pages and the controller first and then modify the copies so your changes do not get overwritten when you install a new version of the package. Do not modify the Visualforce pages or controller directly.



**Note:** When you install a new version of the Public Knowledge Base package, you must have a migration strategy to re-implement your changes into the new pages and controller that come with the updated package.

To clone and modify the Visualforce pages and Apex controller:

1. From Setup, click **Develop > Pages**.
2. Click a Public Knowledge Base Visualforce page.
  - `pkb_Home`
  - `pkb_RSS`
  - `pkb_Settings`
  - `pkb_Template`
3. Click **Clone**.
4. Change the `Label` and `Name` of the Visualforce page.



**Note:** The `Label` and `Name` can be the same, but they must be different than other pages.

5. Optionally, update the `Description` as well.
6. Make your changes to the cloned Visualforce page.



**Note:** For information on modifying Visualforce pages, see the Visualforce Developer's Guide available in the Salesforce online help.

7. Click **Save**.
8. From Setup, click **Develop** > **Apex Classes**.
9. Click **Edit** next to the `pkb_controller` class.
10. Select and copy everything in the Apex Class tab.
11. Click **Cancel**.
12. From Setup, click **Develop** > **Apex Classes**.
13. Click **New**.
14. Paste the contents from `pkb_controller` class into this new class.
15. In the first line of the file, replace `pkb_controller` with a unique name for this new class.
16. Replace the name of any Visualforce pages you cloned (`pkb_Home`, `pkb_RSS`, `pkb_Settings`, and `pkb_Template`) with the names of the newly cloned versions.
17. Click **Save**.
18. Replace `pkb_controller` with the name of the new Apex class in all Visualforce pages you created (cloned from `pkb_Home`, `pkb_RSS`, `pkb_Settings`, and `pkb_Template`).
19. Enable your cloned Visualforce pages:
  - a. From Setup, click **Develop** > **Sites**.
  - b. Click the label of your Force.com site for Salesforce Knowledge.
  - c. In the Site Visualforce Pages section, click **Edit**.
  - d. Move your cloned Visualforce page to the Enabled column.
  - e. Click **Save**.
20. If you cloned and modified the `pkb_Home` page, specify the newly cloned page in the [Active Site Home Page field](#).
21. If needed, activate your Force.com site for Salesforce Knowledge, and click **Activate** next to your site.
  - a. From Setup, click **Develop** > **Sites**.
  - b. Click **Activate** next to your site.
22. Test to make sure you have successfully overwritten the standard pages. From your Force.com site, navigate to the new cloned pages and make sure they appear instead of the standard pages.

## Custom Template Example

Available in: **Enterprise, Developer, and Unlimited** Editions

### User Permissions Needed

To customize templates: "Customize Application"



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Below is example code for a custom template to display an article type differently on your public knowledge base. To use this code, you'll need to replace the following with objects in your organization.

- `How_To__kav`: An article type as referenced by the API.
- `!How_To__kav.Title`: The title of the article type.
- All values in the `style` tag
- `!How_To__kav.Procedures__c`: A field on the article type.
- `!How_To__kav.Additional_Information__c`: A field on the article type.

```
<apex:page standardController="How_To__kav" sidebar="false"
showHeader="false" cache="false" standardStylesheets="false">
<head>
<meta http-equiv="Content-Type" content="text/html; charset=UTF-8" />
<title> Public Knowledge Base - {!How_To__kav.Title}</title>
<style>
    .contentCenter h2 {
        margin: 30px 0 10px;
        font-size: 16px;
        color: #516C90;
        border-bottom: 1px dashed #CCCCCC;
    }
</style>
</head>

<apex:composition template="pkb_Template">
<apex:define name="body">
<div class="contentCenter">
<br />
<h1 class="title">{!How_To__kav.Title}</h1>

<h2>Procedure</h2>
<div>
<apex:outputfield value="{!How_To__kav.Procedures__c}"/>
</div>

<h2>Additional Information</h2>
<div>
    {!How_To__kav.Additional_Information__c}
</div>
</apex:define>
</apex:composition>
```

```
</div>  
<br />  
<br />  
</apex:define>  
</apex:composition>  
</apex:page>
```



# Test Your Public Knowledge Base

Available in: **Enterprise, Developer, and Unlimited** Editions

## User Permissions Needed

To install, customize, and review the Public Knowledge Base “Customize Application” package:

To ensure your customer experience is as you want it, be sure to test your site live. Here are some suggestions of easy manual tests.

Tests	Steps	Additional Verification and Comments
Access Site	<ol style="list-style-type: none"> <li>1. From Setup, click <b>Develop &gt; Sites</b>.</li> <li>2. Click on the Site URL link to access your public knowledge base site.</li> <li>3. Enter a popular keyword and click <b>Search</b>.</li> </ol>	If you have configured <a href="#">Featured Articles</a> , verify the articles appear in the Featured Articles section.
Select Filters	<ol style="list-style-type: none"> <li>1. Enter a popular keyword and click <b>Search</b>.</li> <li>2. Select filters to see your results narrow.</li> </ol>	This filters the search results by data category.  <b>Note:</b> The Popular Articles only appear after you have selected a filter.
View an Article	<ol style="list-style-type: none"> <li>1. Enter a popular keyword and click <b>Search</b>.</li> <li>2. Click on an article name.</li> </ol>	<ul style="list-style-type: none"> <li>• Verify the Related articles appear on the left based on keyword match.</li> <li>• Verify the options to email or print the article, or to push it to twitter, an RSS feed, facebook or Google Plus</li> </ul>
Give Article Feedback	<ol style="list-style-type: none"> <li>1. In the Feedback section, click <b>No</b> or <b>Yes</b>.</li> <li>2. If you selected No, enter some feedback text.</li> <li>3. Click the <b>Submit</b>.</li> </ol>	Feedback is logged in a Salesforce custom object. This data can be reported on to track deflections and feedback from customers. To view the feedback: <ol style="list-style-type: none"> <li>1. Login to your Salesforce organization.</li> <li>2. Select the <b>PKB 2</b> app from the app menu at the top-right-hand corner of your Salesforce interface.</li> </ol>  <b>Note:</b> If <b>PKB 2</b> is already selected you will not see it in the drop down. <ol style="list-style-type: none"> <li>3. Click the <b>PKB Article Deflection</b> tab.</li> </ol>

Tests	Steps	Additional Verification and Comments
Verify multiple languages	<ol style="list-style-type: none"><li data-bbox="425 247 945 321">1. From the language drop down in the upper left corner select a language.</li><li data-bbox="425 329 945 394">2. Verify the article list has refreshed to articles in the chosen language.</li></ol>	Verify that the list of languages in the drop down are accurate and complete for your public knowledge base.