



Knowledge Feedback

For Lightning Experience



@salesforcedocs

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ABOUT THIS GUIDE

The Lightning Knowledge Feedback app provides the ability to create feedback for Lightning Knowledge articles. The Feedback app is available in both Lightning Experience and Salesforce Classic. This guide gives insight into the latest updates to the app, what's been added, and how it works in the Lightning UI.

EDITIONS

Available in Lightning Experience and Salesforce Classic.

- Enterprise
- Developer
- Performance
- Unlimited

USER PERMISSIONS

To install and customize the Article Quality Index App:

- “Customize Application”

To view and edit object permissions:

- “View Setup and Configuration”
- “Customize Application”
- “Manage Profiles and Permission Sets”

Overview

The Lightning Knowledge Feedback app captures user feedback on Knowledge articles from both internal staff and/or external customers who view articles in a Community. With all of the user feedback collected in one place, Knowledge users can easily improve articles for greater customer success. Organizations responsible for Article content and quality are able to make sure that feedback is handled in a reasonable time by assigning the feedback to the right people, tracking the status of feedback assigned, monitoring backlogged feedback, and tracking how the feedback was handled. You can incorporate these trends into reports to track who is managing feedback when, and how efficiently this feedback is being handled.

The updated version of the package works with the Lightning Knowledge data model. This model has a consolidated single object (named Knowledge by default) and works on the concrete objects KA and KAV, rather than Abstract Entity used in Classic Knowledge.

Lightning Knowledge must be enabled to use this package. However, Feedback can be used in Lightning Experience or Salesforce Classic interface.

Feedback can be created in two ways with this package:

- You can add a Lightning component to the Lightning Knowledge record page and/or the Community Article Detail page. Then, your users can create feedback while viewing an article. With this method, the user doesn't see the written feedback after it has been submitted.

Additionally, this component can be made visible based on specific criteria by using the conditional visibility feature in each component in App Builder. For instance, you can make it so that others, or specific people, only see the article after it has been published.

- Article Feedback records can also be created from a post in the Article Feed on a Knowledge article in the desktop app or in the Community. The post must include a specific hashtag. The default tag is #articlefeedback but it can be configured in your org.

Limitations

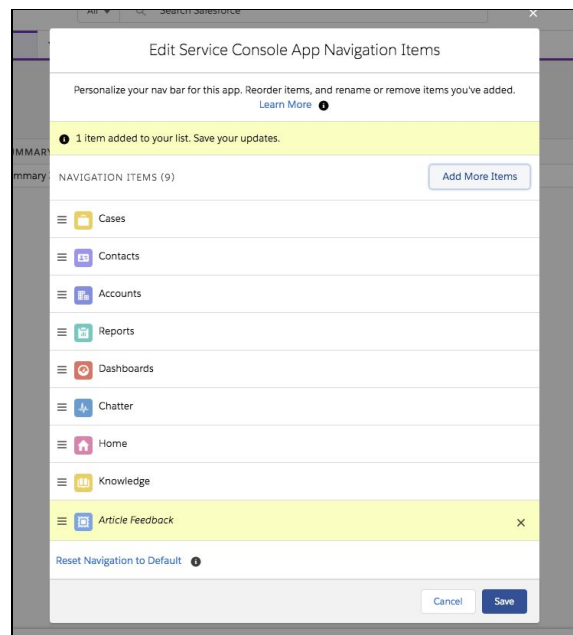
- Article Feedback records cannot be created directly from the Article Feedback record page.
- If the post or the Knowledge article that the post belongs to is deleted, the Article Feed Update field cannot be modified.
- Feed is registered when the type of the Feed Publisher is 'Record'. If the user selects 'Global,' the posts that are created are published directly in Chatter. The Parent ID of the posts ends up being the user's ID and not the Knowledge Article itself, so these type of posts are not processed in the trigger that creates Article Feedback records.
- When a Feedback record is created in the Article Feed on a translated version of the article, the master language version of the article will be displayed by default. This happens because the FeedItem (post) that is created with the hashtag lacks the necessary information to retrieve the translation language of the Knowledge Article.

- The Article Rating and Feedback component provided in the package works in the Knowledge Lightning Record Home page and in Communities.

Install and Configure

Before installing and configuring the Knowledge Feedback App, make sure:

- Salesforce Knowledge is enabled in your org. [Learn More](#).
- Lightning Knowledge is enabled. Once enabled, you can use feedback in both Lightning Experience and Salesforce Classic, but you can only use the Article Rating component in Lightning Experience.
- (Optional) Chatter feed is enabled on articles. Feeds must be enabled if you plan to use this method to capture feedback. [More Info](#).
- In the Salesforce Apps, add the Article Feedback Object in the place you will want to access it. Access additional help in the Salesforce [help center](#).

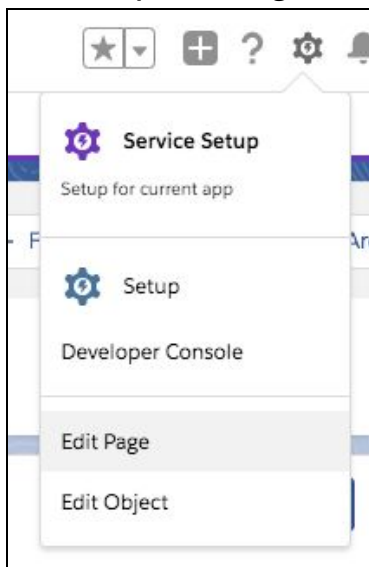


Setup Article Ratings and Feedback Component

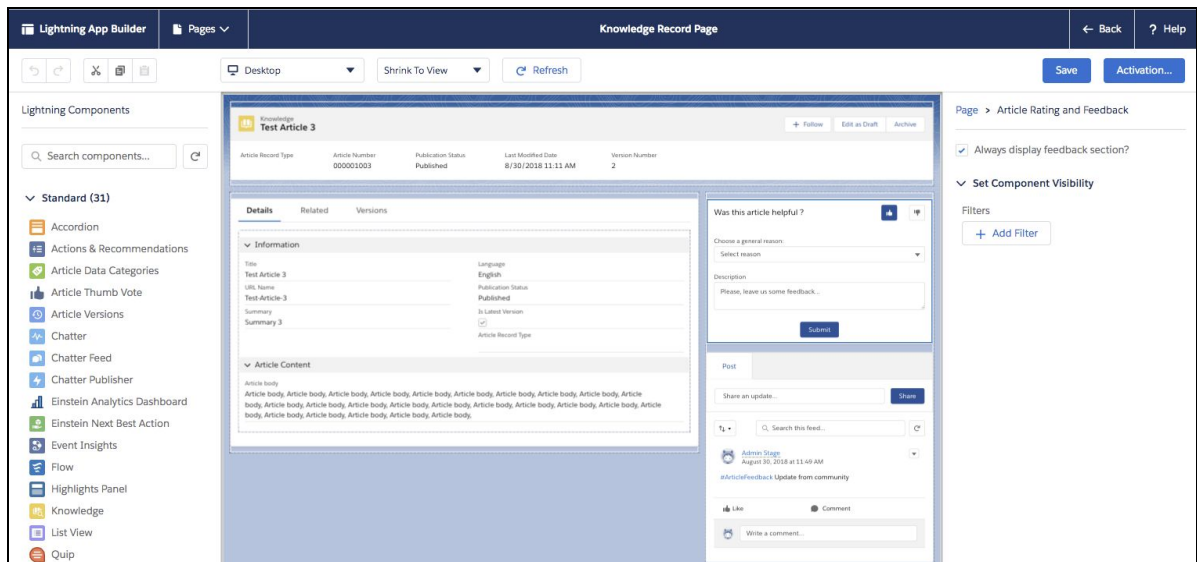
Users can submit ratings and/or written feedback for an article. For instance, if a user thinks an article was helpful, they can give it a thumbs up. If the admin opts for a feedback section, a text field can appear to provide additional written feedback.

After the package is installed, the admin needs to add the new component to the record page (or pages) where it will be used. Use the following instructions to set it all up:

1. Go to the record page.
2. Go to **Setup > Edit Page**



3. Add the Article Rating and Feedback tool to the page in place of the standard Article Thumb Vote tool. The Article Rating and Feedback can be added in any section, including a tabbed or accordion section. If the admin only wants this feature to be exposed to certain users in specific conditions, choose Set Component Visibility and add filters.

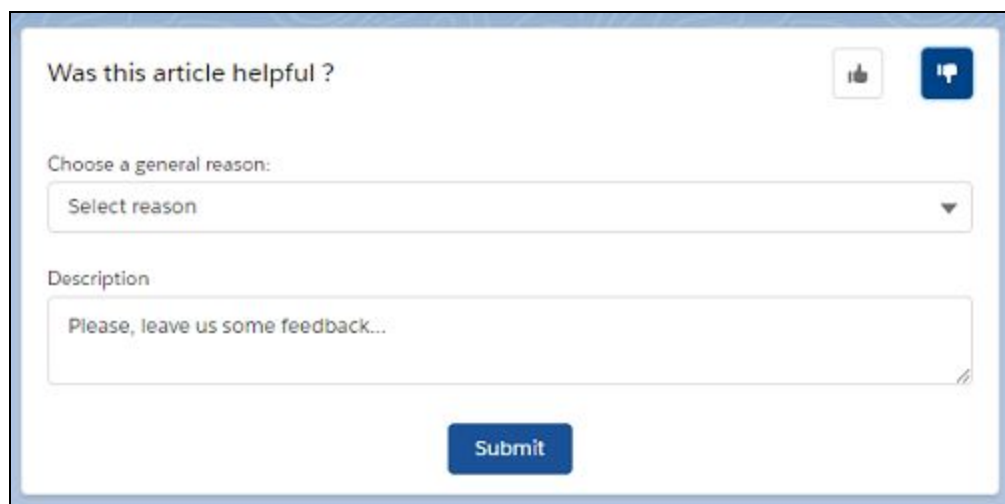


4. Next, the admin decides where the written feedback textbox will show.
 - a. If the pref “Always display feedback section?” is left unchecked, the user sees the thumbs up and thumbs down icons in the component and written feedback is not be an option for the user.



If no rating is selected, the user will not have the option to provide written feedback.

Let’s say the user clicks the thumbs down icon. A user can choose from a dropdown list and select why they believe the article is unhelpful and have the option to leave additional feedback.



- b. If the pref “Always display feedback section?” is checked, the user will always have the option to leave written feedback when choosing either the thumbs up and thumbs down icon.

If the thumbs up icon is clicked when “Make rating required?” appears, a rating is required every time written feedback is submitted.

The screenshot shows the Salesforce Knowledge Article Feedback interface. At the top, there's a navigation bar with 'Article Feedback' and 'Knowledge' tabs. A search bar is visible. Below the navigation bar, a green success message states 'Success Feedback saved successfully'. The main content area displays article details: 'Article Record Type', 'Article Number 000001030', 'Publication Status Published', 'Last Modified Date 12/21/2018 12:02 PM', and 'Version Number 1'. A 'Details' tab is active, showing a table with columns for 'Title' and 'URL Name'. The 'Title' row shows 'Test Article 25'. To the right, there's a 'Was this article helpful?' section with thumbs up and thumbs down icons. Below this is a 'Post' section with a text input field and a 'Share' button.

Article Record Type	Article Number	Publication Status	Last Modified Date	Version Number
	000001030	Published	12/21/2018 12:02 PM	1

Details	Related
Information Title Test Article 25 URL Name	

Was this article helpful ?

Post

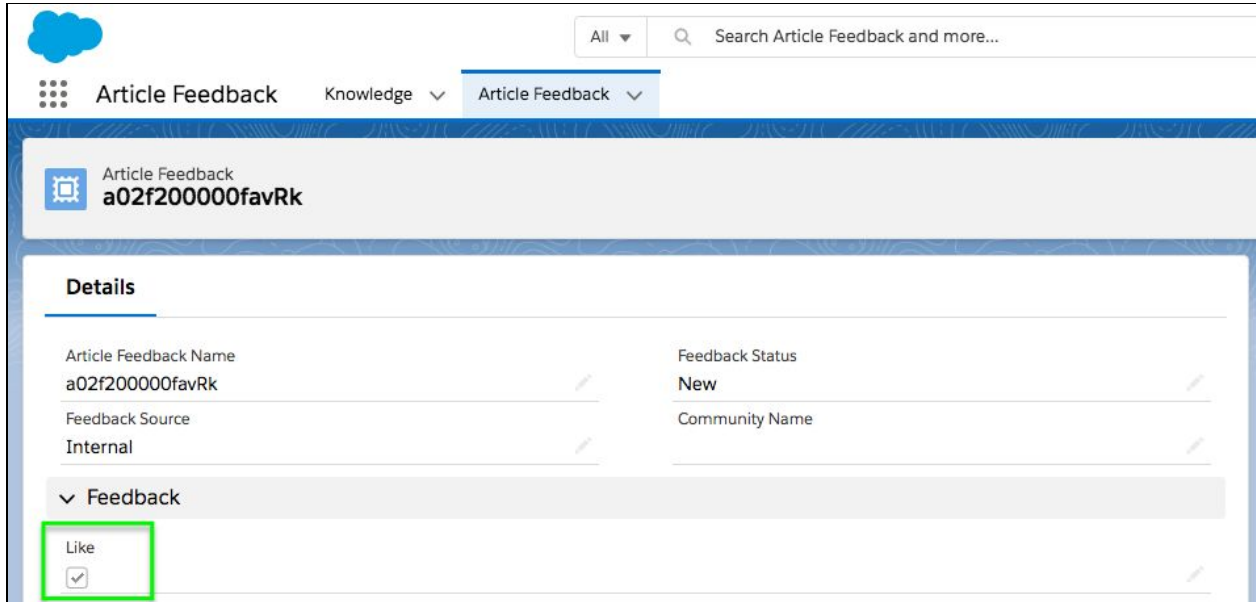
Share an update...

Share

Use Article Ratings and Feedback Component

Once a user rates an article, they can leave as many comments as they'd like. They will not be allowed to give a second rating, but they can change the reason selected in the list view. A new Article Feedback record is created every time an article is either rated or commented on.

- The Like checkbox in the Article Feedback record shows the thumbs up or thumbs down rating.



The screenshot displays the 'Article Feedback' interface. At the top, there is a search bar with the text 'Search Article Feedback and more...' and a dropdown menu set to 'All'. Below this, the 'Article Feedback' tab is selected, showing a record with the ID 'a02f200000favRk'. The 'Details' section includes fields for 'Article Feedback Name' (a02f200000favRk), 'Feedback Status' (New), 'Feedback Source' (Internal), and 'Community Name'. A 'Feedback' section is expanded, showing a 'Like' checkbox which is checked and highlighted with a green box.

- When a user selects a reason from the dropdown list, it will be tracked in the Feedback Reason field under the Article Feedback tab.



All ▾
Search Article Feedback and more...

Article Feedback
Knowledge ▾
Article Feedback ▾

Article Feedback
a02f20000favka

Details

Article Feedback Name	a02f20000favka	Feedback Status	New
Feedback Source	Internal	Community Name	

Feedback

Like
☐

Feedback Reason
Enhancement suggestion

- When the user leaves feedback in the text area, the written feedback is tracked in the Feedback from Rating field in the Article Feedback record.



All ▾
Search Article Feedback and more...

Article Feedback
Knowledge ▾
Article Feedback ▾

Article Feedback
a02f20000favkL

Details

Article Feedback Name	a02f20000favkL	Feedback Status	New
Feedback Source	Internal	Community Name	

Feedback

Like
☐

Feedback Reason
Enhancement suggestion

Feedback from Rating
Test

Use Feed Tracking

Want to track mentions and hashtags related to your articles? Use Feed Tracking to keep tabs every time someone uses a #ArticleFeedback or hashtag of your choice.

1. Download and install the Knowledge Feedback app from the AppExchange. Follow the installation wizard and your company's preferences.
2. Using App Builder or Community Builder, add the Article Rating and Feedback components to your Knowledge record pages and/or Communities Articles pages.
3. (Optional) Configure the hashtag used to capture feedback from an article feed.
 - a. From Setup, go to **Build > Develop > Installed Packages**.
 - b. Click **Configure** next to the Knowledge Feedback app.

Installed Packages										
Action	Package Name	Publisher	Version Number	Namespace Prefix	Install Date	Limits	Apps	Tabs	Objects	
Uninstall Configure	Knowledge Feedback Tracking Tool	Salesforce.com	1.0	aft	9/1/2015 12:53 PM	✓	0	1	2	

- c. Click **Edit**.
- d. The default hashtag for the package is “#ArticleFeedback”. If you would like to change that hashtag to something else, enter a hash (#) and the word you want to use to create an Article Feedback record and click **Save**. You can also change the hashtag through **Build > Develop > Custom Settings**. Click **Manage**, then click **Edit** to get to the following screen.

 Settings for Knowledge Feedback Tracking

* Hashtag

Edit

You're done! Any time a user enters the selected hashtag in an article's feed, internally or on a community, the comment is tracked on the Article Feedback tab.

4. Configure the feedback options to your liking, including whether to require ratings, require feedback, or require feedback only for thumbs down ratings.

For more details on configuring the feedback and ratings. See “Use Article Ratings and Feedback.”

Article Feedback Records

Knowledge managers can use the Article Feedback Record Home page to assign Knowledge users and track the feedback resolution progress.

[illegible]

The Details section contains the record details for all submitted Feedback.

The Related Article component makes it easy to view the related article and the feedback along with it. The component can be placed anywhere on the page.

If the Related Article is Archived, a warning will show in the Related Article tab on Article Feedback Record Home.

Table 1: Helpful Fields to Filter or Display (for both Lightning and Classic)

Field	Description
Action Date	Date action was taken. Complete this field when you are done handling the feedback.
Action Taken	Identifies if the article was archived or updated or if no action was needed. Complete this field when you are done handling the feedback
Article Created Date	The date the article was originally created
Article Feedback Name	A unique number assigned to the feedback
Article Feed Update	Public comments made on the article feed where the original feedback came from, visible

	to both internal and community users that have access to the article and Article feed
Article Link	The link to the published article
Article Number	A unique number assigned to the article
Article Record Type	The record type of the article
Article Title	The title of the published article
Article Version	The iteration number, one is the first publication
Assigned to	The Knowledge user assigned to resolve the feedback
Community Name	The community where the feedback originated (if it came from a Community)
Feedback	The description a user writes on the page after rating an article, including any hashtags
Feedback Reason	The choice a user selects from a listview of reasons for their feedback
Feedback Status	Identifies if the feedback is New, Assigned to a Knowledge user, In Progress, or Closed. When Closed is selected, make sure to also update the Action Date and Action Taken fields
Feedback Source	Identifies if the feedback came internally or from a community
Internal Notes	Article Feedback users can use this field to record information not shown to community users and not posted to the Article feed. This note is only visible in the Article feedback record.

Language	The language of the article
Last Published By	The type of user who last published the article, internal User, Partner User, or Customer Portal User, and the user's name
Last Published Date	The last date the article was published
Like	Rated thumbs up if checked and down if unchecked
Owner	The person that gave the feedback

List Views

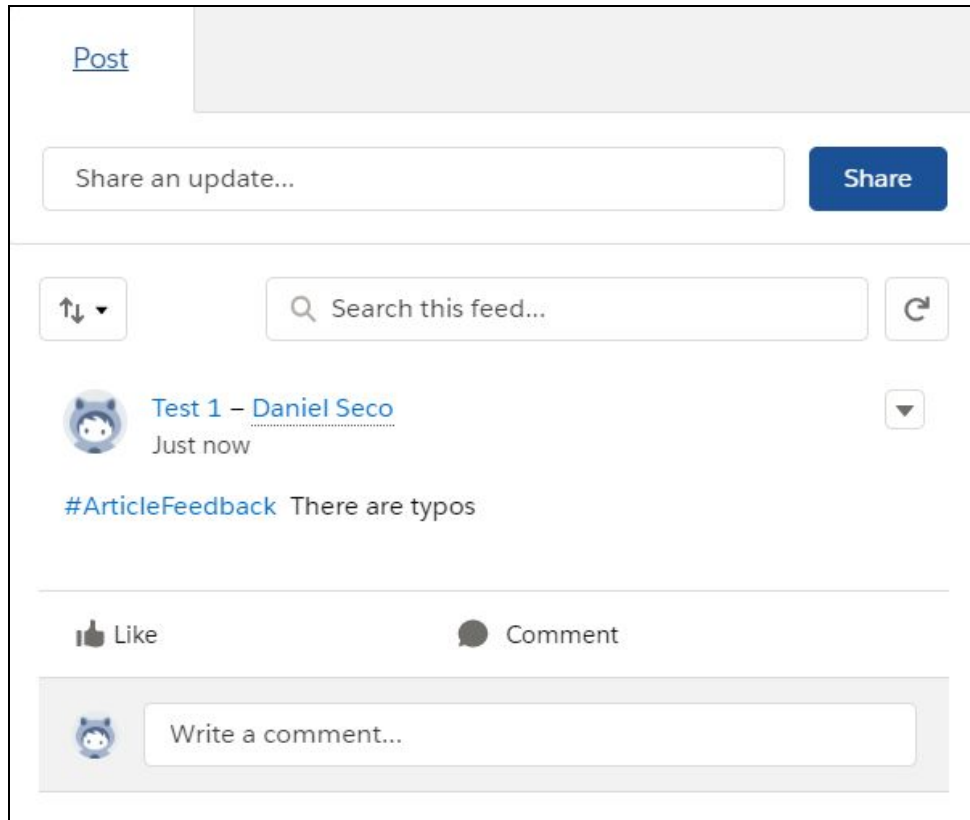
On the Article Feedback tab, you can create list views that filter what you want to see on your page to fit your current needs. For example, you can filter on feedback that is new, older that still needs attention, assigned to you, associated with a particular article, or from a Community.

The screenshot shows the Service Console interface for Article Feedback. A dropdown menu for 'LIST VIEWS' is open, showing options: All (selected), Backlogged Feedback, Feedback Queue, My Feedback - All, My Feedback - Open, New Feedback, and Recently Viewed (Pinned list). The main table displays a list of feedback items with columns: ASSIGNED TO, OWNER ALIAS, CREATED DATE, ACTION DU..., and ACTION TAKEN. The table contains 10 rows of data, including items assigned to 'astag' with various creation dates and 'New' status.

ASSIGNED TO	OWNER ALIAS	CREATED DATE	ACTION DU...	ACTION TAKEN
	astag	11/28/2018 4:27 PM		
	astag	11/28/2018 4:29 PM		
	astag	11/29/2018 11:18 AM		
	astag	11/29/2018 11:21 AM		
	astag	11/29/2018 11:23 AM		
	astag	11/29/2018 11:24 AM		
	astag	11/30/2018 2:35 PM		
	astag	11/30/2018 3:04 PM		
	astag	11/30/2018 3:04 PM		
	astag	11/30/2018 3:07 PM		
	astag	11/30/2018 3:05 PM		
	astag	12/18/2018 5:55 PM		
	astag	12/18/2018 5:58 PM		

Use Feedback in Salesforce Classic

When you install the Knowledge Feedback app in a Lightning Knowledge org, you can add and review feedback in Salesforce Classic.

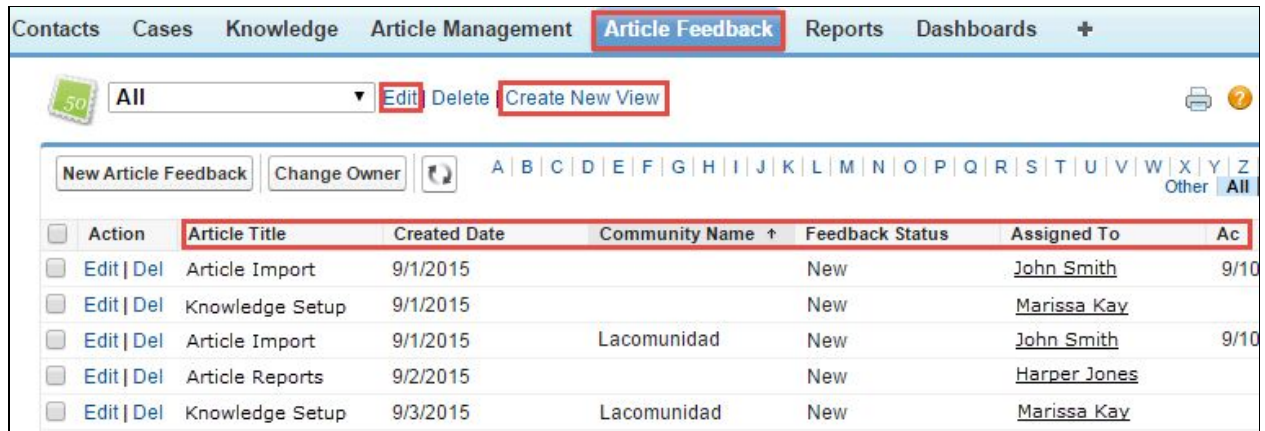


The Article Feedback Tab

You can access all feedback previously submitted from the Article Feedback tab.

List Views with Salesforce Classic

On the Article Feedback tab, you can create list views to filter your article feedback. For example, you can filter on feedback that is new, older feedback that still needs attention, feedback that is assigned to you or associated with a particular article, or from a Community.



Action	Article Title	Created Date	Community Name	Feedback Status	Assigned To	Ac
☐ Edit Del	Article Import	9/1/2015		New	John Smith	9/10
☐ Edit Del	Knowledge Setup	9/1/2015		New	Marissa Kay	
☐ Edit Del	Article Import	9/1/2015	Lacomunidad	New	John Smith	9/10
☐ Edit Del	Article Reports	9/2/2015		New	Harper Jones	
☐ Edit Del	Knowledge Setup	9/3/2015	Lacomunidad	New	Marissa Kay	

Feedback Record with Salesforce Classic

Knowledge managers can use the Article Feedback detail page to assign Knowledge users and track the feedback resolution progress.

Information	
Article Feedback Name	AF-000000
Feedback Source	Internal
Community Name	
Feedback Status	In Progress
Feedback	Old screen shots! #ArticleFeedback
Owner	John Smith
Assigned To	User Marissa Kay
Action Date	9/10/2015 [9/10/2015]
Action Taken	Article Updated
Internal Notes	← → B <i>I</i> <u>U</u> S We had the same feedback from a community member. Let's fix this!
Article Feed Update	Screen shot updates coming next week.

Application Changelog

[1.6.] - 2019-04-16

Added	• All visible labels can be translated in the 'Translation' workbench. The custom text values can be translated in the Custom Labels menu. • There is a new option on the Rating component to require written feedback when a negative vote is registered. The option is a checkbox in the component with the name • Require written feedback with negative rating and is available in the App Builder.
Changed	• First version with LWC. The existing Aura component was migrated to Lightning Web Component. The behaviour is the same, but if you had the component in a record page you will need to change it to the new one. • We removed the configuration of the Feedback Reason picklist values from the Settings page. Only the hashtag configuration remains in the aforementioned page. • Now the values of the Feedback Reason picklist are managed from the field 'Feedback Reason Picklist Values' located inside the Article Feedback object (Setup > Object Manager > Article Feedback > Fields & Relationships and select the field 'Feedback Reason Picklist Values'). • The way we manage picklist values displayed for Thumbs up or Down in the Article Rating component also changed. 'Feedback Reason picklist' has a field dependency with the controlling field 'Thumb Vote'. These values can be mapped in Setup > Object Manager > Article Feedback > Fields & Relationships. Here, select the button 'Field Dependencies'. • The fields Feedback Reason and Feedback Reason Picklist have been changed to Feedback Reason (Developer Value) and Feedback Reason Picklist Values respectively.
Removed	• Article Feedback Values object (afl__Article_Feedback_Values__c) has been deprecated

[1.5.] - 2019-12-03

Added	• Checks for knowledge permissions in several instances to prevent nullPointer error
Fixed	• Error displayed when profile without permissions over Knowledge object tries to post in Chatter

[1.4.] - 2019-10-18

Fixed	• The arrows to select available values are not visible
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[1.3.] - 2019-09-26

Added	• Let the user add values for Reason for Feedback picklist. • Hashtag config: Control that the hashtag is present and Added at the beginning of the text field • Insert picklist values by default • Rebuild settings page to display one single list instead of dual multi picklist • Added error message when 'Create AQI' tab is accessed from Lightning UI
Fixed	• Values in the Selected list are moved back to the Available list when a new value is added or deleted

[1.2.] - 2019-06-21

Added	• Permissions checks missing on methods
Changed	• Update structure to fit new SFDX project

[1.1.] - 2019-04-03

Fixed	• Check isCreateable permissions when the custom setting is created. • Security review issues: CRUD/FLS Enforcement Vulnerability. Added isAccessible check on SELECT • Removed the field "Article Type" from the Page Layout of the Article Feedback object
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[1.0.] - 2019-02-22

- First version of the package