

# ProProfs Knowledge Base

## User Manual



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# ProProfs Knowledgebase FAQs

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# Getting Started

# How to Create a Knowledge Base

Create and manage multiple help webpages on your website with ProProfs Knowledge Base.

Each help site can have its color theme, CSS, domain name, and other features.

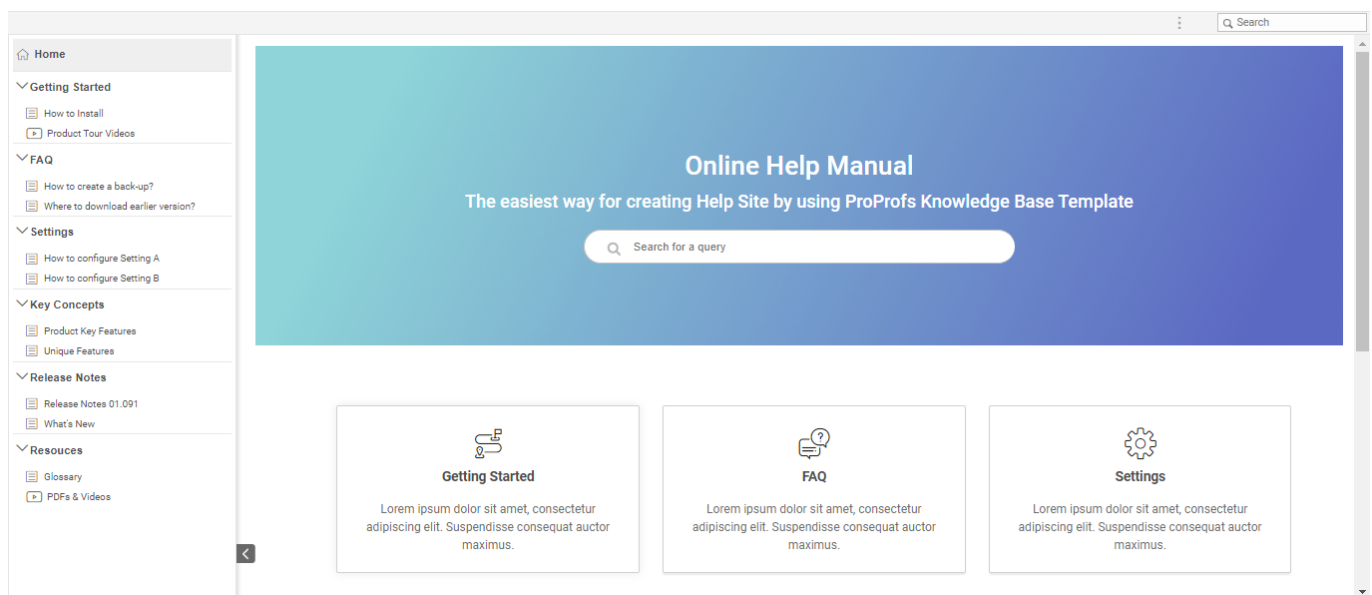
Watch this [quick video](#) to learn how to create a knowledge base.

Or [continue reading](#) to understand it step-by-step.

## Benefits of creating a knowledge base:

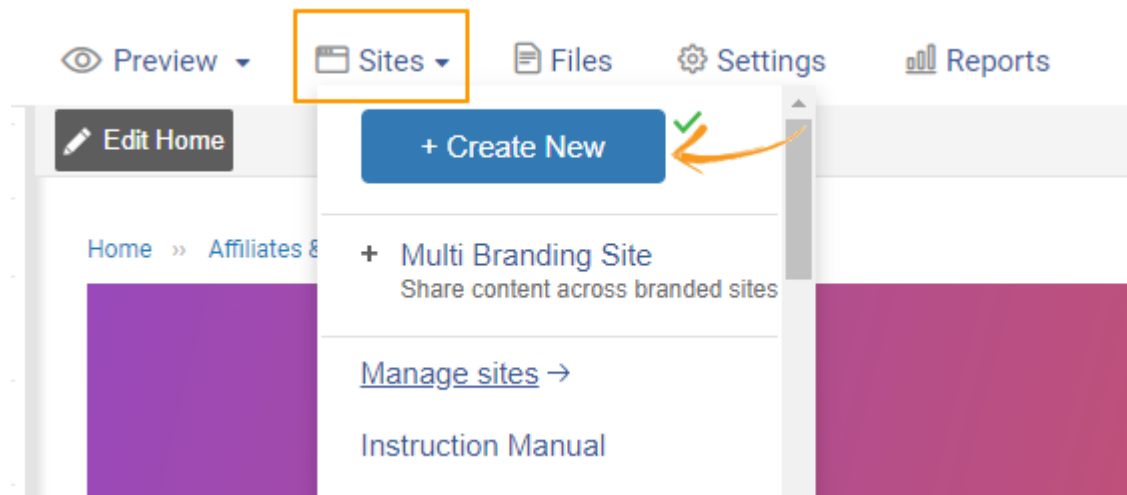
- **Customers who prefer self-service** can find answers to their questions on their own
- **Fewer tickets for common questions** will allow the customer support team to focus on more pressing issues

Here's a preview of how the site will appear in a web browser:



To create a knowledge base:

**Step 1:** From your ProProfs Knowledge Base dashboard, go to **Sites >> '+ Create New.'**

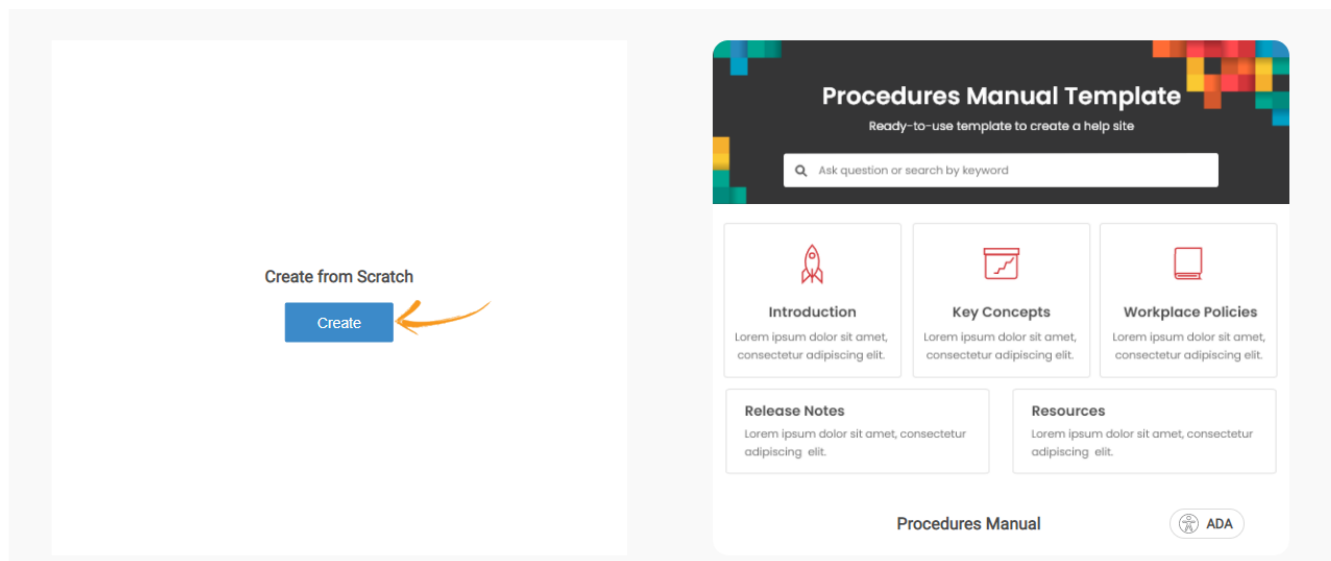
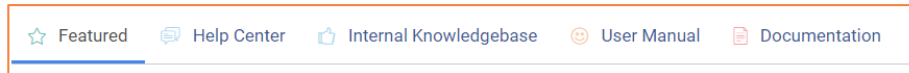


**Step 2:** You can select a ready-made knowledge base design or create one from scratch. To build from scratch, click '**Create.**'

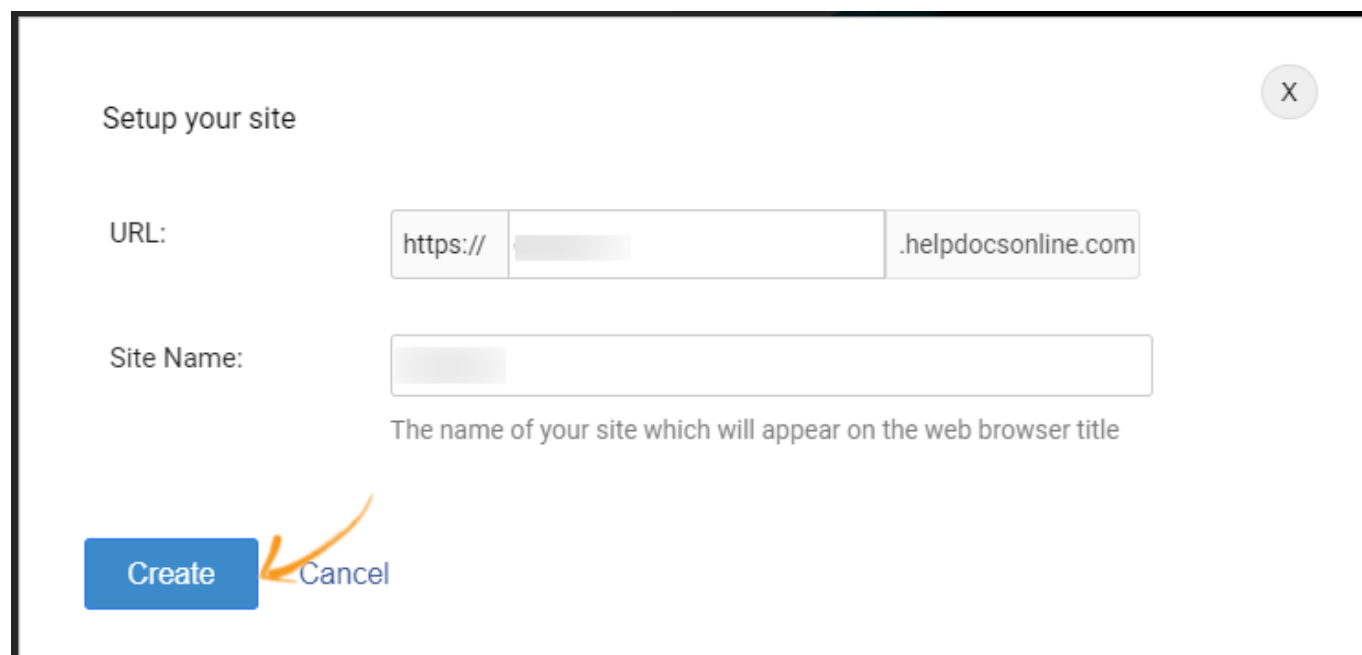
[← Go Back](#)

## Choose Your Template

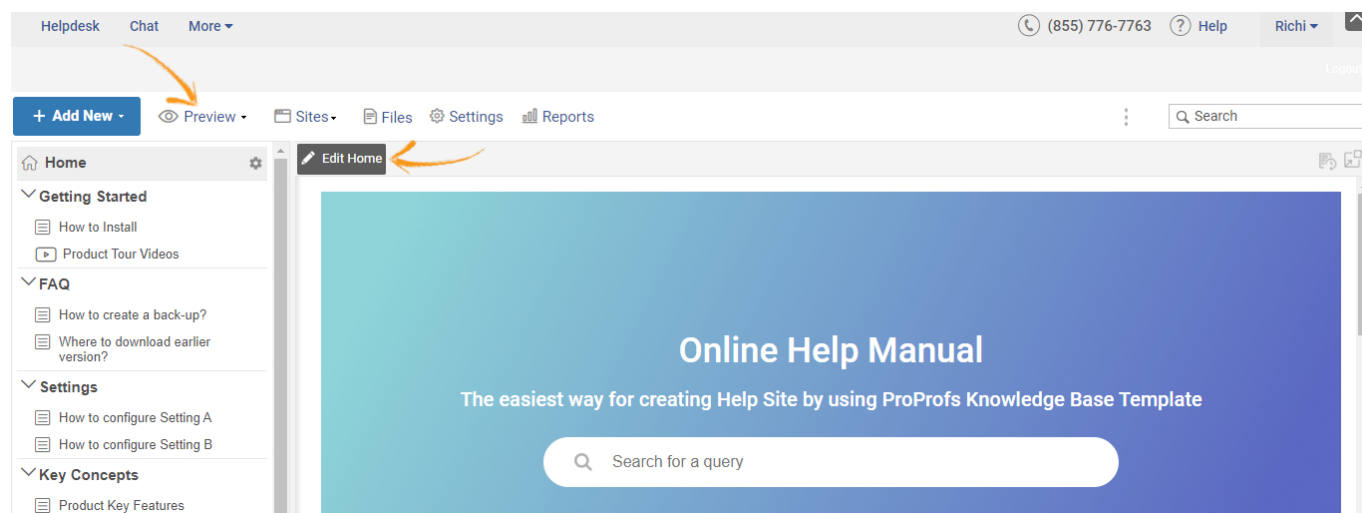
Create Manuals, Documents, Knowledge Base or Help Center. See our customers [examples gallery](#)



**Step 3:** Enter the **site URL name**, and click **Create**.



**Step 4:** Start customizing your site by clicking [Edit Home](#). When you're done, you can **preview** your site to see how it is going to look.



*That is all about creating a self-service knowledge base for your website.*

### Related Articles:

- [How to Add, Edit, and Delete a User?](#)
- [Dashboard Overview](#)
- [Product Tour](#)



# How to Add, Edit, and Delete a User in the Knowledge Base

In ProProfs Knowledge Base, the admin can add new users and assign them roles, edit details of an existing user, and even delete the one you do not wish to give access to.

## Benefits of managing users in ProProfs Knowledge Base:

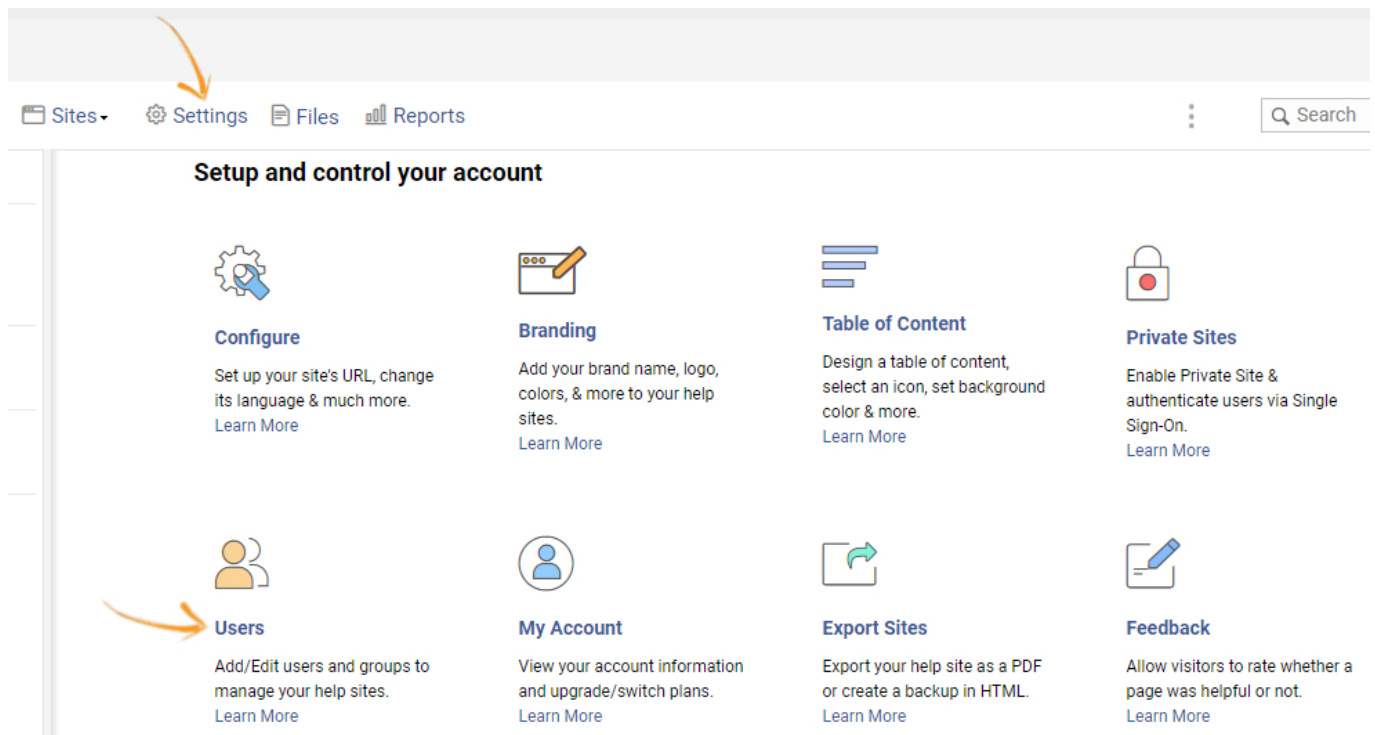
- **Assign** different roles to users to handle various tasks
- **Combine** users doing similar tasks in a group, mark them active/inactive or delete them based on the requirements

In this article, you'll learn:

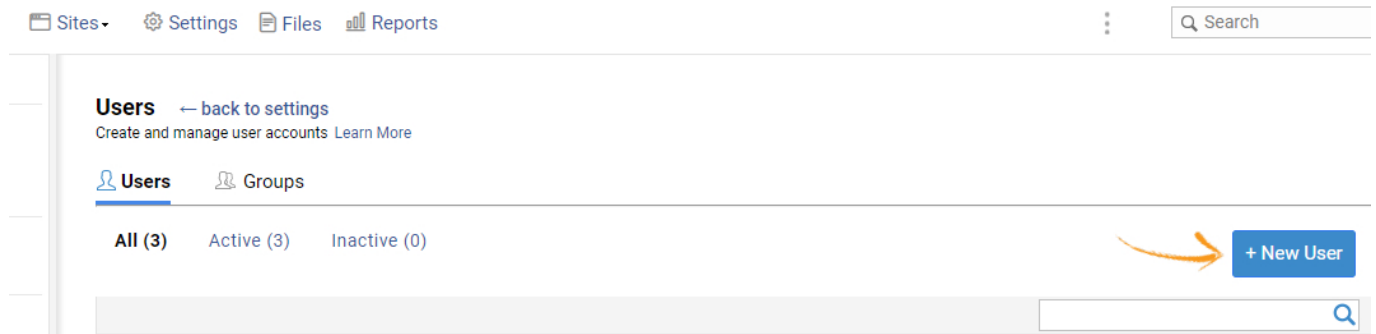
1. [How to Add a User](#)
2. [How to Edit a User](#)
3. [How to Delete a User](#)

## How to Add a User

**Step 1:** Go to **Settings >> User** from your ProProfs Knowledge Base dashboard.



**Step 2:** Click **+ New User**.



**Step 3:** Fill in the required details, check the sites the new user can access, and click **Create** at the bottom of the form. A user has been added.

### Add User

[← back to settings](#)

\* Name

\* Email

\* Role

Editor

▼

Learn

More

Select Group

None

▼

\* Language

Same as current site

▼

\* Time Zone

(UTC -8:00) Pacific Standard Time, Clip... ▼

☐ Day Light Savings Time

The user is allowed to access these sites:

☐ Sites
 ☐ online-help-manual-new-test - English - (United States)(default)
 ☐ Instruction Manual - English - (United States)
 ☐ Bestseller - English - (United States)

Upload from Excel

Microsoft Excel

Email Notification Template

Create

Cancel

**Step 3.1:** Alternatively, you can upload users in bulk using a **Microsoft Excel** file.

**Step 3.2:** To upload users:

1. **Download** the sample Excel file and **add users** according to the format.
2. Click on '**Browse**' to select and upload the excel sheet of users.

3. Click on '**Upload**' to finish importing the users from the sheet.

## Bulk Upload Users

### Create your user list

You can add a list of user accounts via an excel sheet instead of adding each user manually. To do so, simply upload the excel sheet which consists the detail of the users.

NOTE: The excel sheet will appear as a table and first row of the sheet should be the header. Also, header should contain the details in the same order as mentioned below or else it won't work.

[Download Sample Upload Files.xlsx](#) ——— 1

Upload your list in a spreadsheet format.

 Browse ——— 2

3

Upload Close

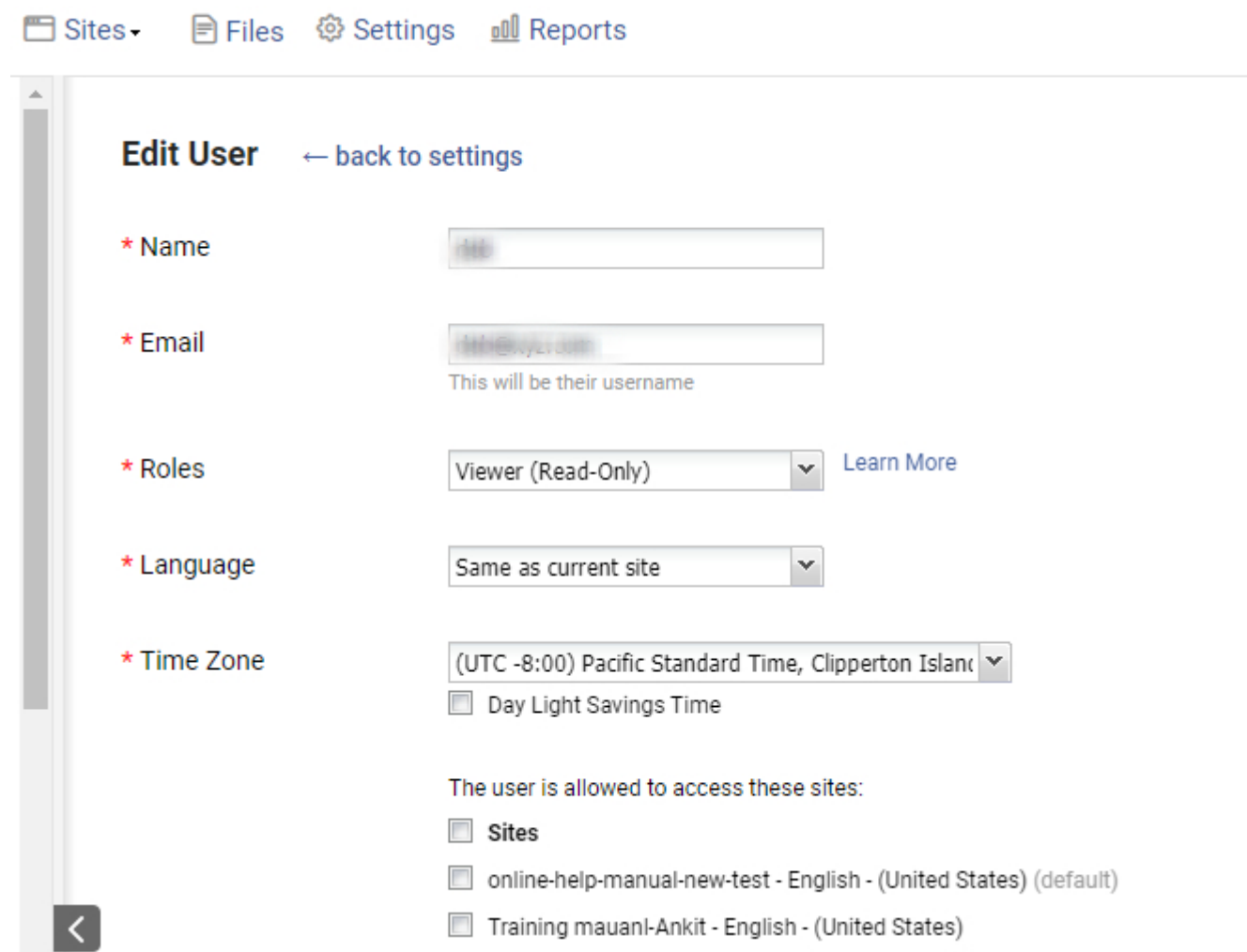
## How to Edit a User

**Step 1:** Under **Users**, click on a username to edit the details of that user.

The screenshot displays the 'Users' management page. At the top, there are navigation links: Sites, Files, Settings, and Reports. Below this, the 'Users' section is active, with a link to 'back to settings'. The page title is 'Users' and it includes a subtitle 'Create and manage user accounts Learn More'. There are tabs for 'Users' and 'Groups'. Below the tabs, there are filters for 'All (3)', 'Active (3)', and 'Inactive (0)'. A '+ New User' button is visible. The main table lists users with columns: Name, Email, Role, Group, and Status. The first user is 'deb' (viewer) in 'Group 2, Gr...'. An orange arrow points to the 'deb' username. The table also shows 'Active' and 'Inactive' buttons for each user, and an 'Invite Again' button. The bottom of the table shows 'Page 1 of 1' and 'Displaying users 1 - 3 of 3'.

**Step 2:** You can now edit the details such as user credentials, their role, language, time zone,

and more.



**Edit User** ← [back to settings](#)

\* **Name**

\* **Email**   
This will be their username

\* **Roles**  [Learn More](#)

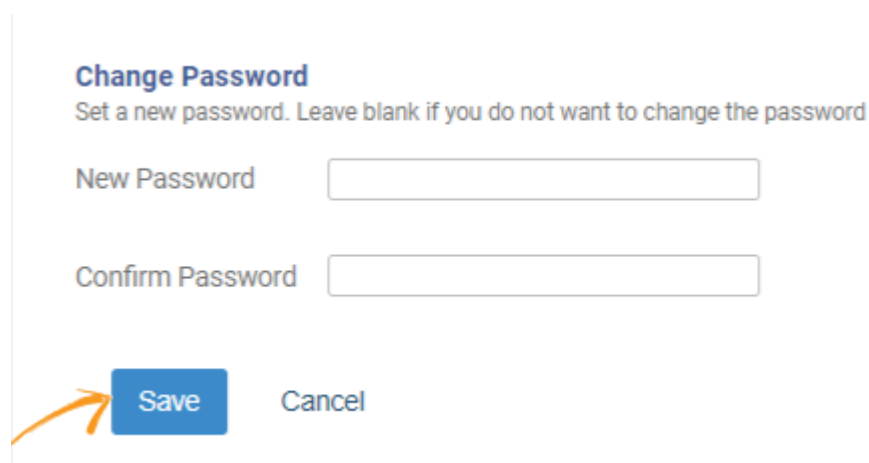
\* **Language**

\* **Time Zone**   
☐ Day Light Savings Time

The user is allowed to access these sites:

- ☐ **Sites**
- ☐ online-help-manual-new-test - English - (United States) (default)
- ☐ Training mauanl-Ankit - English - (United States)


**Step 3:** Scroll down to the bottom, and you'll find the option to **change the password** as well. As a user, you can reset your password here. As an admin, you can reset the password for other users. Once you're done, **save**.



**Change Password**  
Set a new password. Leave blank if you do not want to change the password

New Password

Confirm Password

 **Save** [Cancel](#)

## How to Delete a User

**Step 1:** Under **Users**, click on the **delete icon** of the user you want to delete.

Sites Settings Files Reports

Search

### Users

← back to settings  
Create and manage user accounts [Learn More](#)

Users Groups

All (3) Active (3) Inactive (0) [+ New User](#)

Name	Email	Role	Group	Status
Mark Stephen (master)	mark.stephen@proprofs.com	Administrator		Active
Group Admin	group.admin@proprofs.com	Group Admin		<a href="#">Active</a> <a href="#">Inactive</a> <a href="#">Invite Again</a>
Viewer	viewer@proprofs.com	Viewer	Group 2, Gr...	<a href="#">Active</a> <a href="#">Inactive</a> <a href="#">Invite Again</a>

Feedback

*That is all about adding, editing, & deleting a user in the ProProfs Knowledge Base.*

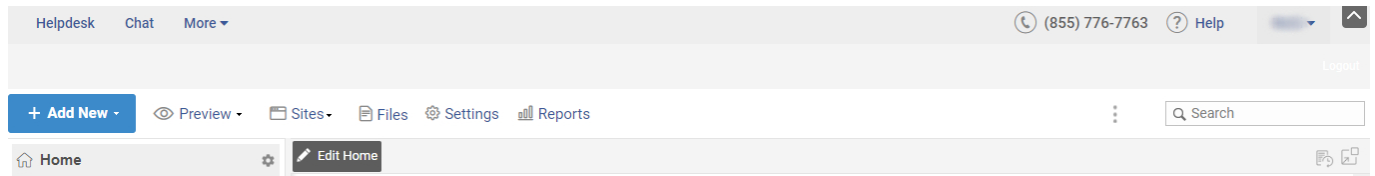
### Related Articles:

- [How to Create a Knowledge Base?](#)
- [Dashboard Overview](#)
- [Product Tour](#)

# Dashboard Overview

The Dashboard is the first page you arrive on when you log in to your ProProfs Knowledge Base account. This page further branches out to all the relevant options and settings that you require to manage your help sites, account, users, and more.

When you log in, this is how your dashboard appears, as shown in the screenshot below.



The major components of the dashboard are:

- [+ Add New](#)
- [Preview](#)
- [Sites](#)
- [Files](#)
- [Settings](#)
- [Reports](#)
- [Table of Content](#)

Then on the far right, you will find the following (below the search bar):

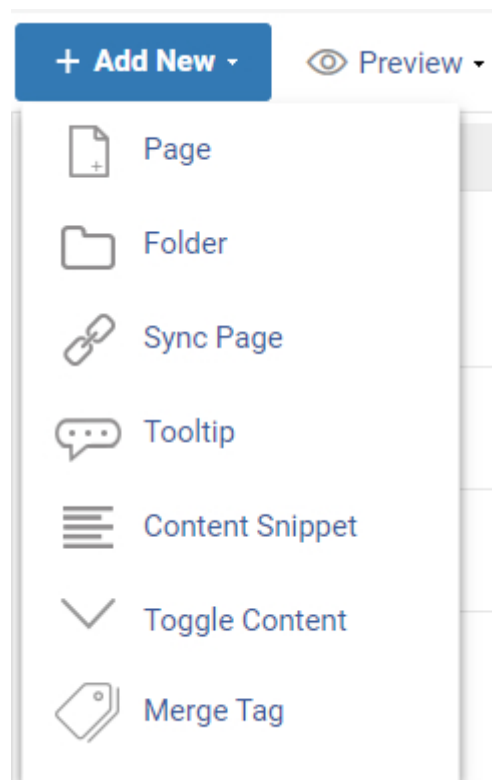
- [Revision History and Pop Up](#)
- [Delete Page](#)

For more settings

- [Tab View](#)
- [Save Page as PDF](#)
- [Edit Account](#)

## Let's take a look at each option individually:

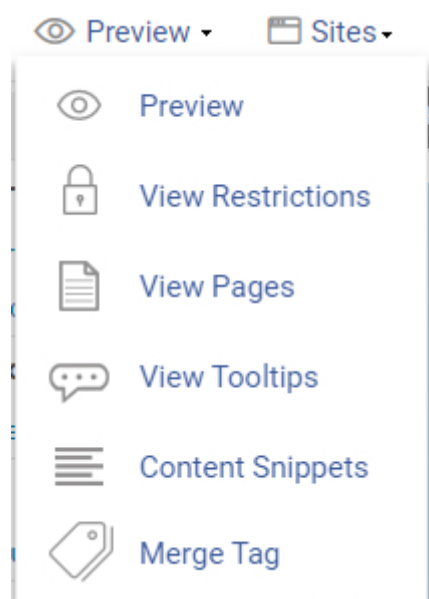
**+ Add New:** Add several elements such as a new page, folder, tooltip, and content snippet. You can also sync pages, toggle content, and merge tags.



**Preview:** This option allows you to preview the Home page of your help site. Additionally, you have the following options as well:

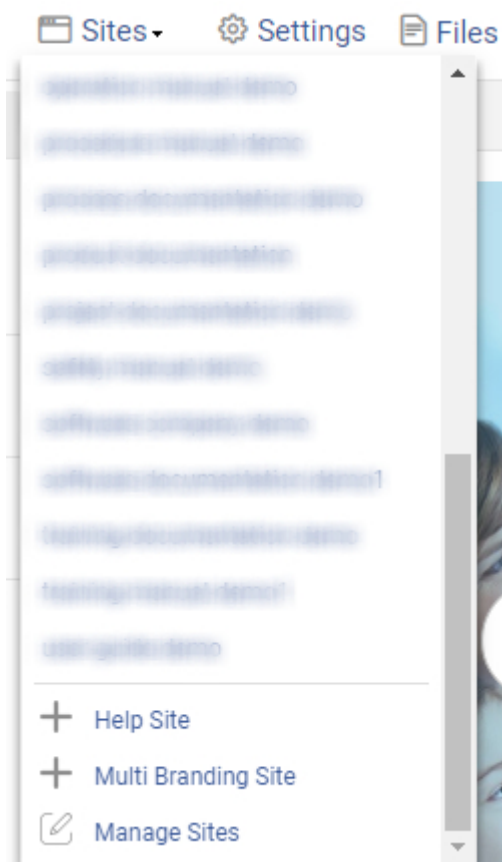
- **View Restrictions:** You can set restrictions on your users for accessing your help site depending on their roles and responsibilities.
- **View Pages:** You can view the pages listed in the Table of Content.

Furthermore, you can create and view **tooltips**, **content snippets**, and **merge tags**.

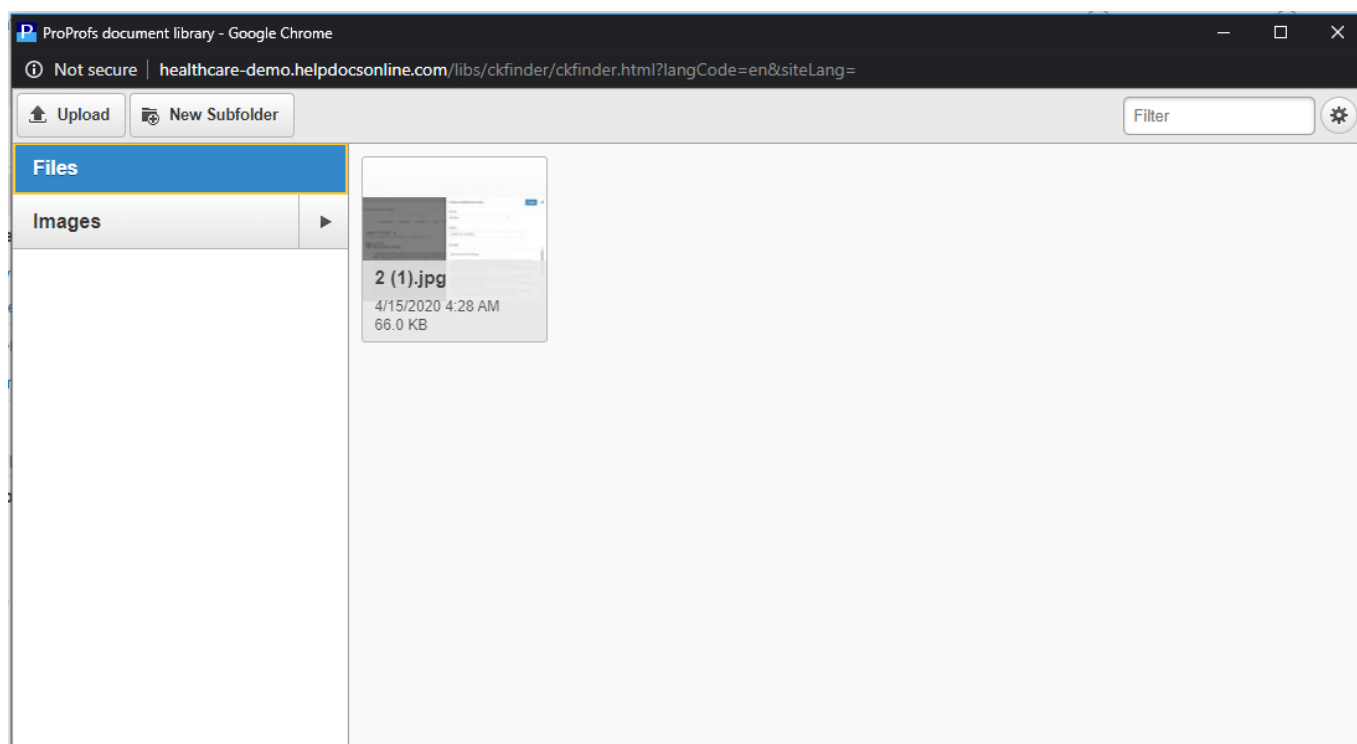


**Sites:** This option allows you to create and manage your help sites. You can also navigate between multiple help sites from here.

- **+ Help Site:** Create a new help site.
- **+ Multi Branding Site:** Create multiple sites that lead to the same help site.
- **Manage Sites:** Edit, copy and delete help sites.






**Files:** You can upload and store files such as images, PDFs, and docs.






**Settings:** It has everything to enable you to manage your **help sites**, **account**, and **users**. You can customize the **table of content**, **page footer**, **export help sites as PDF**, **import HTML files as help sites**, etc. You can recover deleted pages from the **vault**, add **help widgets**, and add **chat** to your help site to assist customers. You can even integrate software such as Zendesk, Google Analytics, Salesforce, and more.


 Settings  Files  Reports ⋮

### Setup and control your account




#### Configure

Set up your site's URL, change its language & much more.  
[Learn More](#)




#### Branding

Add your brand name, logo, colors, & more to your help sites.  
[Learn More](#)




#### Table of Content

Design a table of content, select an icon, set background color & more.  
[Learn More](#)




#### Private Sites

Enable Private Site & authenticate users via Single Sign-On.  
[Learn More](#)




#### Users

Add/Edit users and groups to manage your help sites.  
[Learn More](#)




#### My Account

View your account information and upgrade/switch plans.  
[Learn More](#)




#### Export Sites

Export your help site as a PDF or create a backup in HTML.  
[Learn More](#)




#### Feedback

Allow visitors to rate whether a page was helpful or not.  
[Learn More](#)




#### Import Files

Import existing HTML files and convert them into help sites.  
[Learn More](#)




#### Vault

Recover your deleted pages easily from Vault.  
[Learn More](#)




#### In-App Help

Add help widget to your website and provide instant help to visitors.  
[Learn More](#)




#### Conditional Content

Set rules to hide or display specific content on your help site.  
[Learn More](#)




#### ProProfs Survey Maker

Integrate surveys and custom forms authored using ProProfs survey maker  
[Learn More](#)




#### ProProfs Chat

Help visitors interact with your support team in real-time.  
[Learn more](#)



#### Integrations

Integrate with Zendesk, Google Analytics, Salesforce Desk & more.  
[Learn more](#)



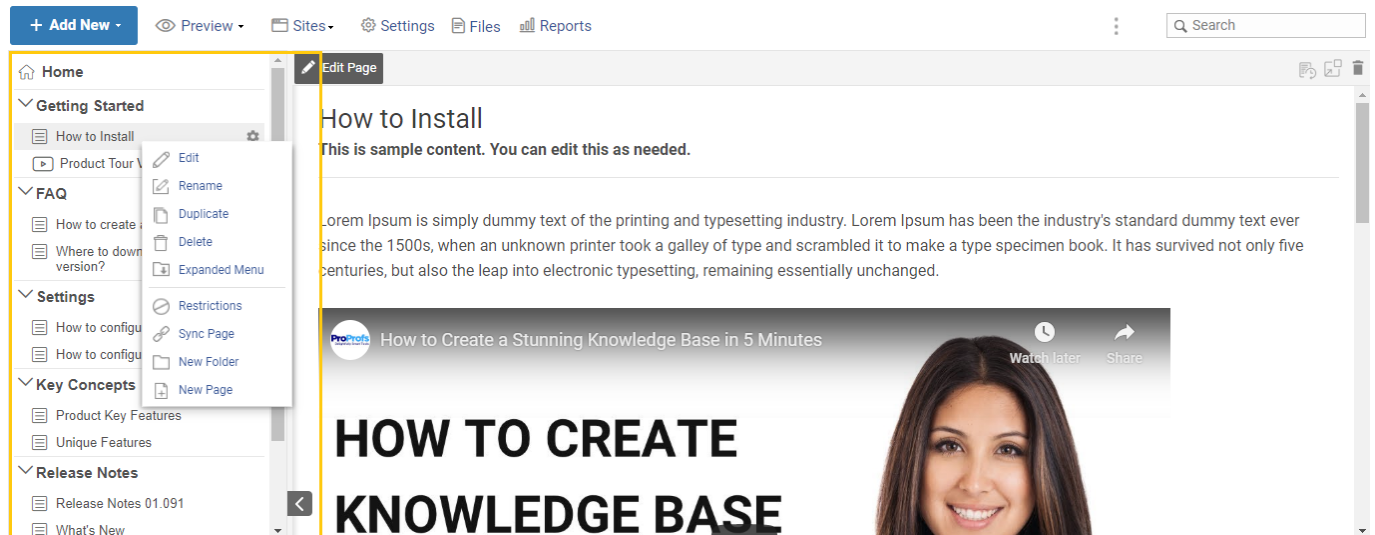
#### Page Footer

Customize footer such as adding contact details, social media.  
[Learn more](#)

**Reports:** Check the performance of your help sites. For example, the number of times your articles have been read, how many searches did your articles appear in, etc.

**Table of Content:** The table of content displays the tree hierarchy of the pages, folders, and subfolders for the help site. From the table of content, editors can navigate, reorder, edit and

customize pages, folders, and subfolders.

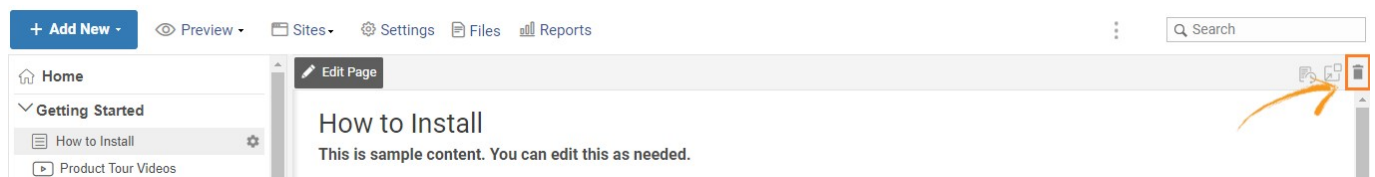


**Revision History and Pop Up:** You can track the revision history of your help sites and the Home page. Create Pop ups and Lightboxes for displaying helpful content to your site visitors and customers.

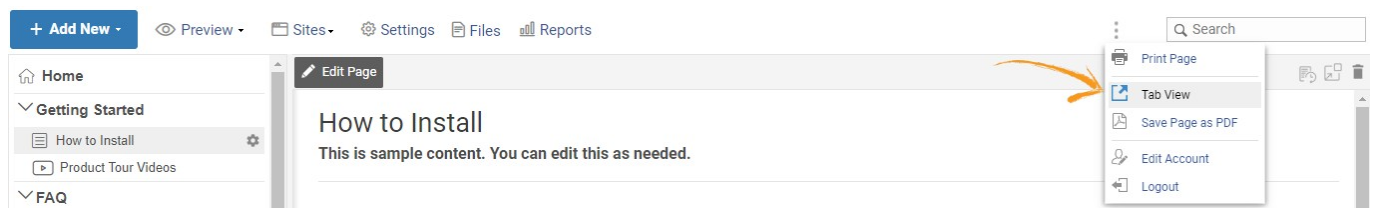


**Delete Page:** This will delete the current page. A confirmation message will appear that you must confirm that you want to delete.

**Note:** Pages are not permanently deleted. The page will be moved to the vault. You can either delete the page permanently or restore the page.

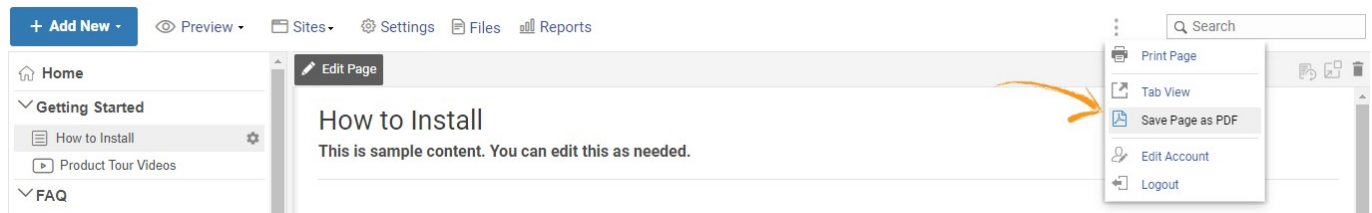


**Tab View:** Users can easily browse for pages in the table of contents and open them up in separate tabs. Each tab will display a distinct page.



A confirmation message will appear that you must confirm that you want to change the view. Click on **Yes**.

**Save as PDF:** Users can download the whole help site into PDF.



**Edit Account:** This option allows user to edit **Name, Email, Role, Language, and Timezone**. Users can enable or disable **Auto Save** option as per their preference. Also from here, users can **change password**.

### Related Articles:

- [How to Add and Delete a User in the Knowledge Base?](#)
- [Product Tour](#)
- [How to Add Your Company Logo to Your Knowledge Base](#)

# Tour Videos

# Create a Stunning Knowledge Base

# Design Your Knowledge Base

# Configure Your Knowledge Base Settings

# Improve Collaboration



# Analyze Your Knowledge Base Reports

# Create Online Documentation

# Create Internal Knowledge Base

# How to Create an Online Help Center

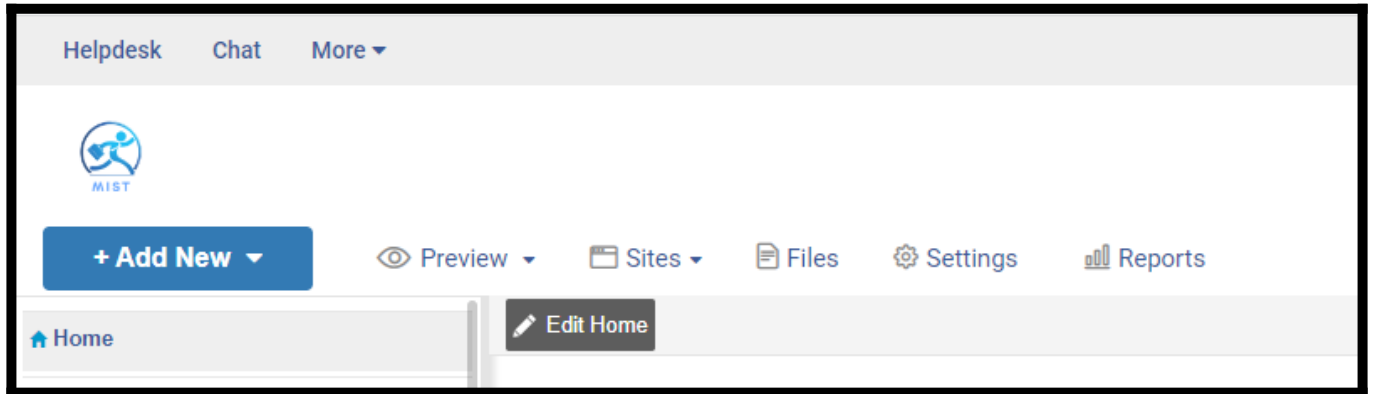
# How to Create Online FAQs

# Create

# How to Add Your Company Logo to a Knowledge Base

ProProfs Knowledge Base editor lets you add your company logo and align the help center with your branding guidelines. You can also customize the header by adjusting its height and color to make your help center visually appealing.

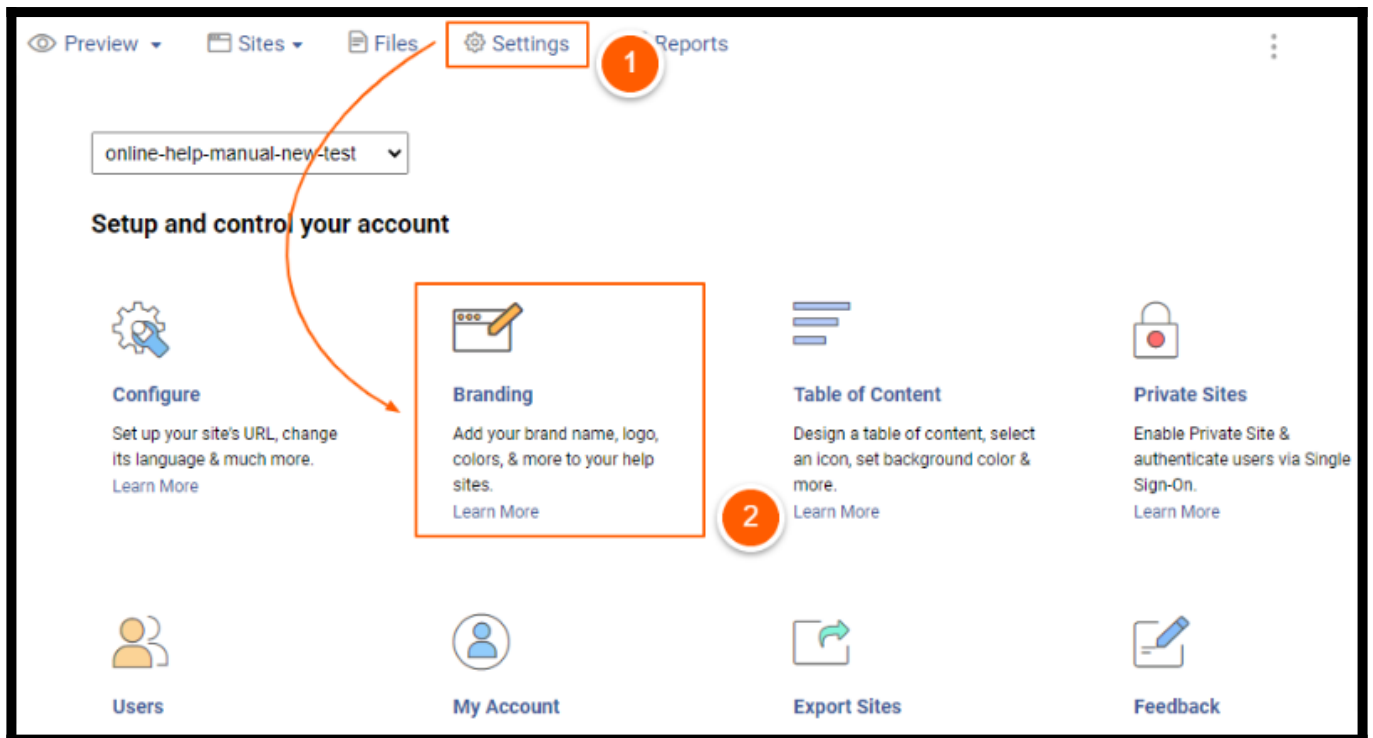
**Here is how your logo appears in your knowledge base.**



The logo adds authenticity to your help center and helps customers quickly identify your brand.

## How to Add Your Company Logo to a Knowledge Base

**Step 1:** On your ProProfs Knowledge Base dashboard, go to **Settings > Branding**.

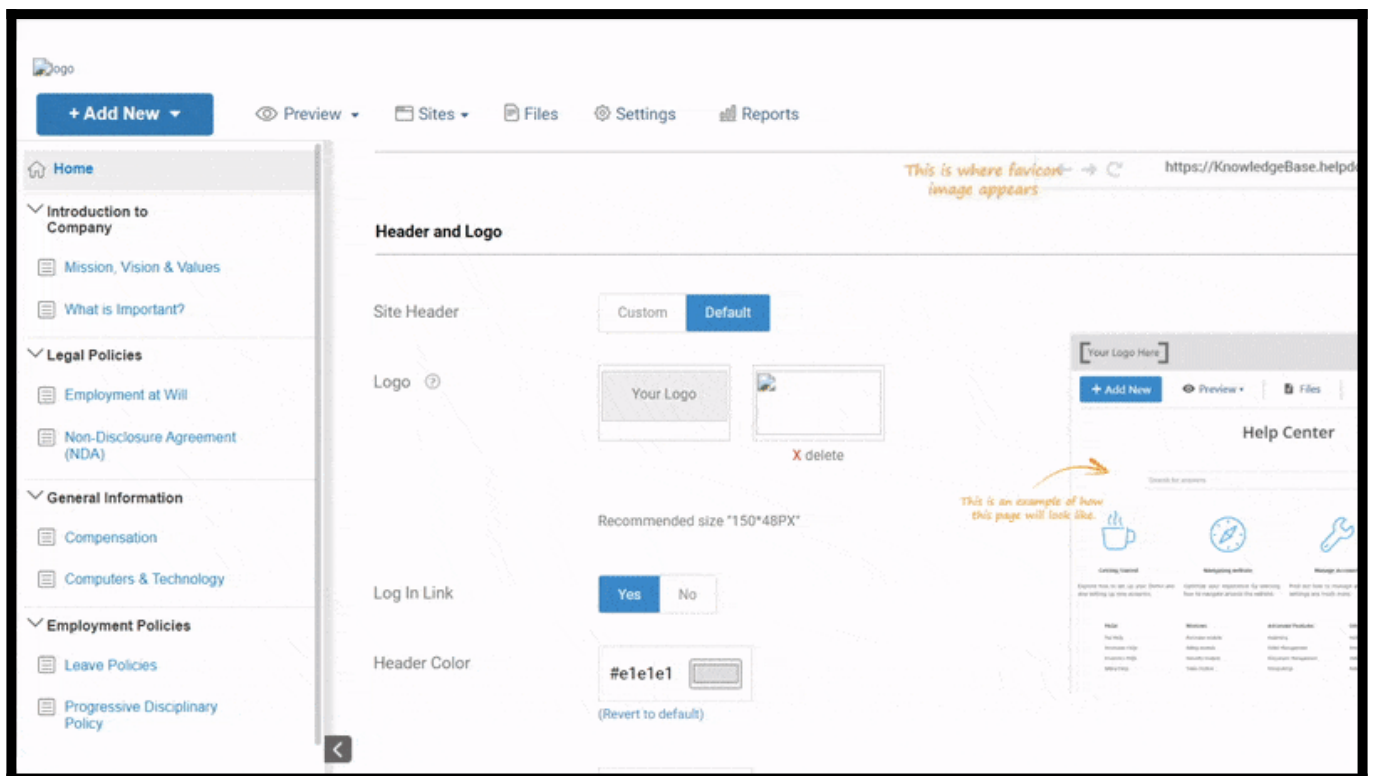


**Step 2:** In the **Header and Logo** section,

- Set the Site Header to **Default**.
- Next, click **"Your Logo Here"** and upload the logo image.

**NOTE:** For the best results, use an image size of 150x48 px.

- Make other adjustments, such as the text color, header color, etc.
- Once done, click **Save**.



*That is all about adding your company logo to your knowledge base.*

## Related Articles:

- [Product Tour](#)
- [How to Customize Your Knowledge Base Home Page](#)
- [How to Add, Edit, and Delete a Page](#)



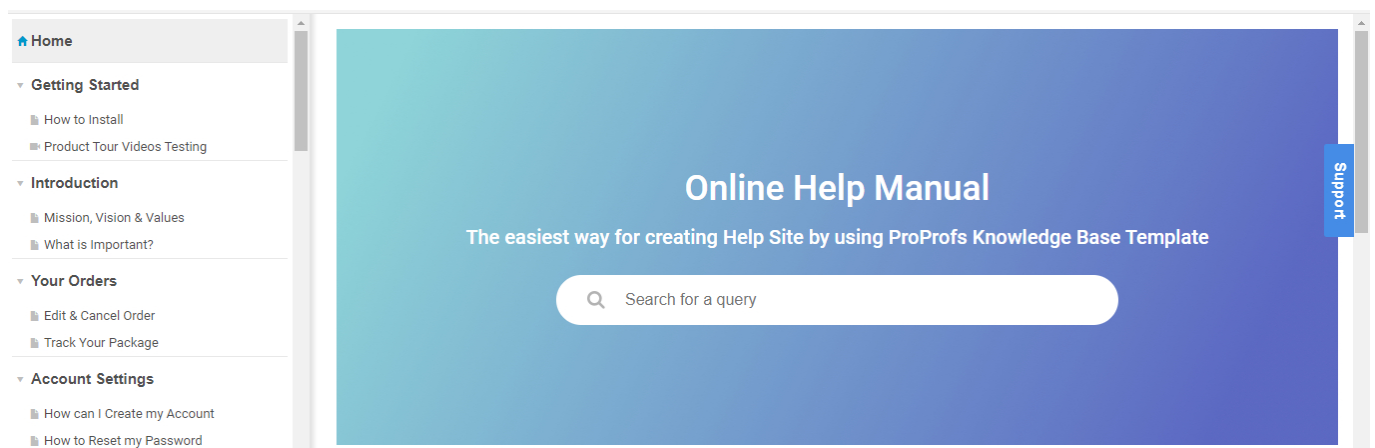
# How to Customize the Homepage of Your Help Site

The **Homepage** is the front fascia of your help site. It's where your customers land to seek help. So it's important to have a self-explanatory homepage with a search bar and important links placed right in front of the customers' eyes. This article explains how you can customize the homepage of your help site.

## Benefits of customizing your KB Home:

- Brand your help site by adding your company logo and colors
- Equip customers with handy links right on the homepage
- Boost customer satisfaction with a robust help site

## Here's an example of a stunning help site homepage:



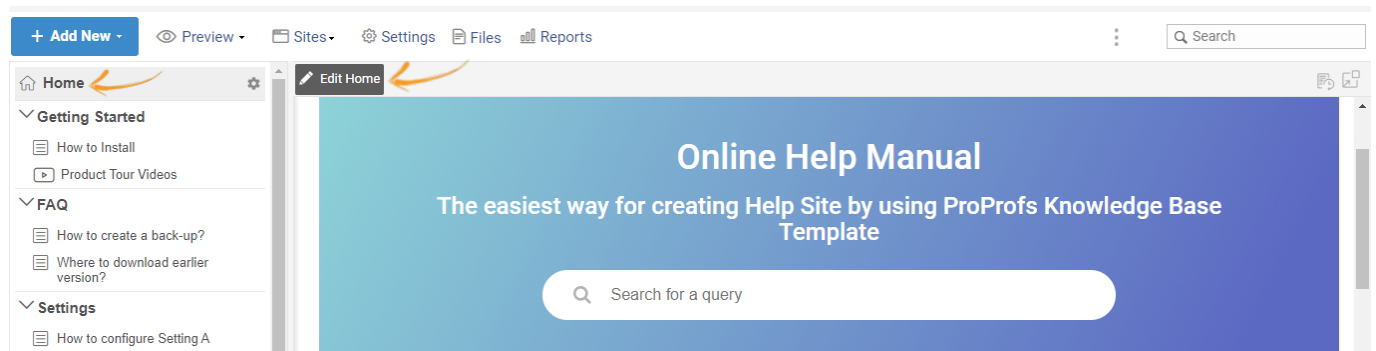
The Homepage consists of various elements such as the top header, header, theme, categories, etc., that you can customize based on your audience's needs.

## In this article, you'll learn:

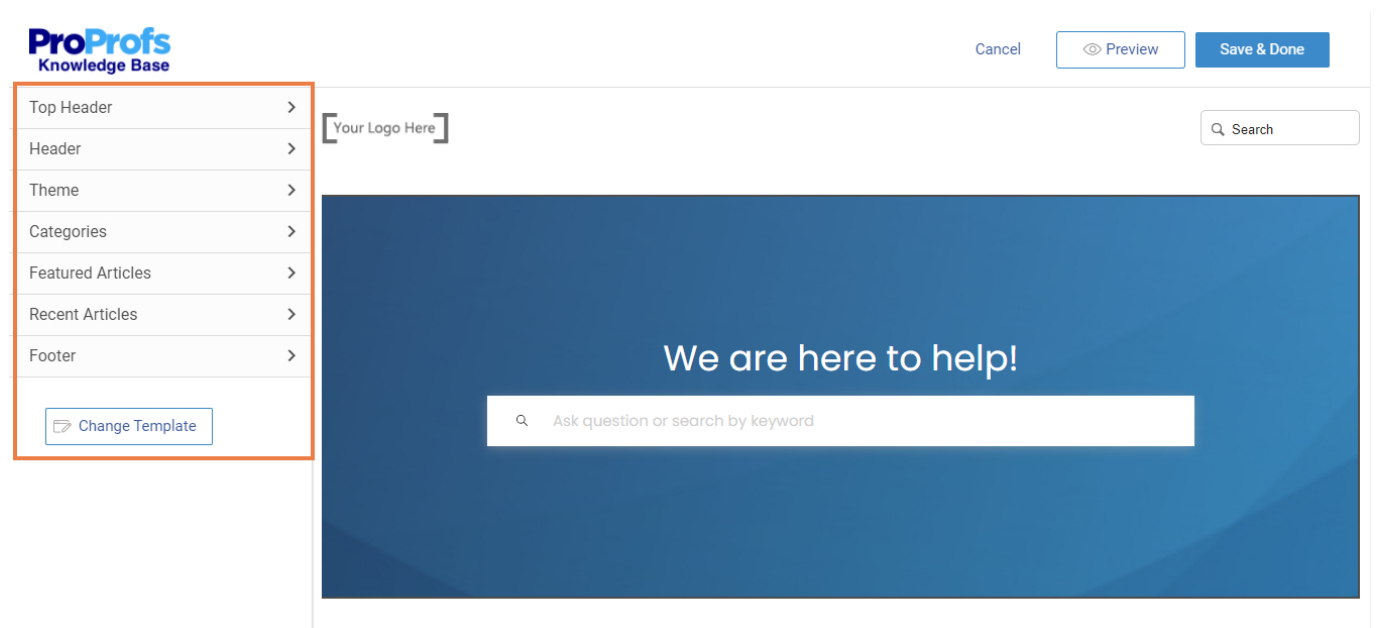
1. [How to change the homepage template](#)
2. [How to customize the top header](#)
3. [How to customize the header](#)
4. [How to customize the theme](#)
5. [How to customize categories](#)
6. [How to add feature articles](#)
7. [How to add recent articles](#)
8. [How to add a footer](#)

To begin customizing the Homepage, click **Edit Home** from your ProProfs Knowledge Base

dashboard.




You can now click on individual sections - **Top Header**, **Header**, **Theme**, **Categories**, **Featured Articles**, **Recent Articles**, **Footer**, and **Change Template** - and start customizing on the left side of the page.



## 1. How to change the Home page template


Let's begin by choosing the right template for the Home page. To do that:


**Step 1.** To change the homepage template, click **Change Template** from the left menu.



Cancel
Preview
Save & Done

- Top Header >
- Header >
- Theme >
- Categories >
- Featured Articles >
- Recent Articles >
- Footer >


Change Template



[Your Logo Here]

Q Search

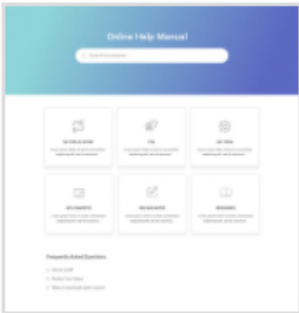
## We are here to help!


Q Ask question or search by keyword


**Step 2.** Select a template of your choice and click **Change**.


## Select Template


Since each template is a different design, you may lose some content changes done to the home page.




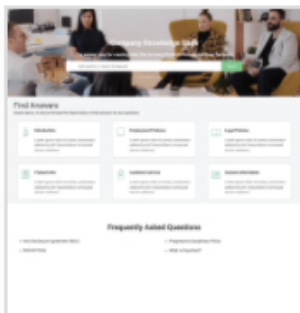


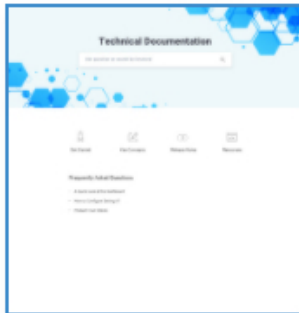












Change

Cancel

**Step 3.** Click **Yes** to confirm the warning message below and apply your selected template.



If you change your layout, you will lose the changes  
you have made to the Home Page.

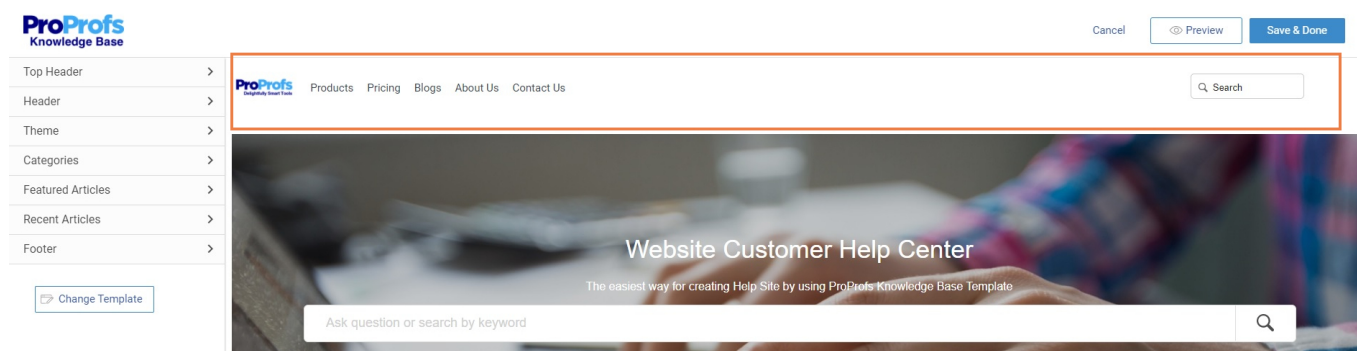
Do you want to change your template?

YES

NO

## 2. How to customize the top header

The screenshot below shows how the top header appears. It may contain your company logo, menus, and a search bar, all of which are customizable. Click **Top Header** on the left side menu to start customizing.



The screenshot below gives you an expanded view of the **Top Header** section.



← Top Header

Logo

Replace

Recommended Size: 150\*50PX

Header Color

#153d52

Search: ☒ Yes ☐ No

Menu: ☒ Yes ☐ No

1. Click **Replace** to upload your company logo.
2. Change the **background color** of the header according to your preference.
3. Enable **search** in your top header, as shown in the screenshot below.



4. Activate the **Menu** option to add different menus that may take your website visitors to their respective pages. It further reveals the following options.

The screenshot shows a menu configuration interface. At the top, there is a 'Menu:' section with 'Yes' and 'No' buttons. Below this is a 'Menu Color' section with a color picker showing '#ffffff' and a small square color swatch, with an orange line and the number '5' pointing to it. Underneath is a 'Menu Item 1' section with a trash icon and an orange line with the number '6' pointing to it. Below that is a 'Text' section with a text input field containing 'Products' and an orange line with the number '7' pointing to it. Next is a 'Page Url' section with a text input field containing 'http://online-help-manual-new-t' and an orange line with the number '8' pointing to it. At the bottom is a '+ New Link' button with an orange line and the number '9' pointing to it.

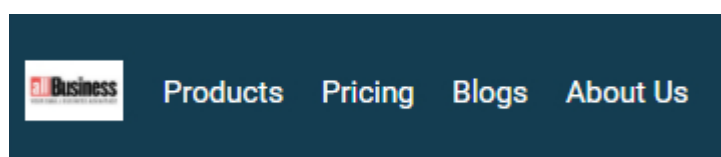
5. Select the **color** of the **menu text**.

6. **Delete** this particular menu item.

7. Add the **title** of the menu.

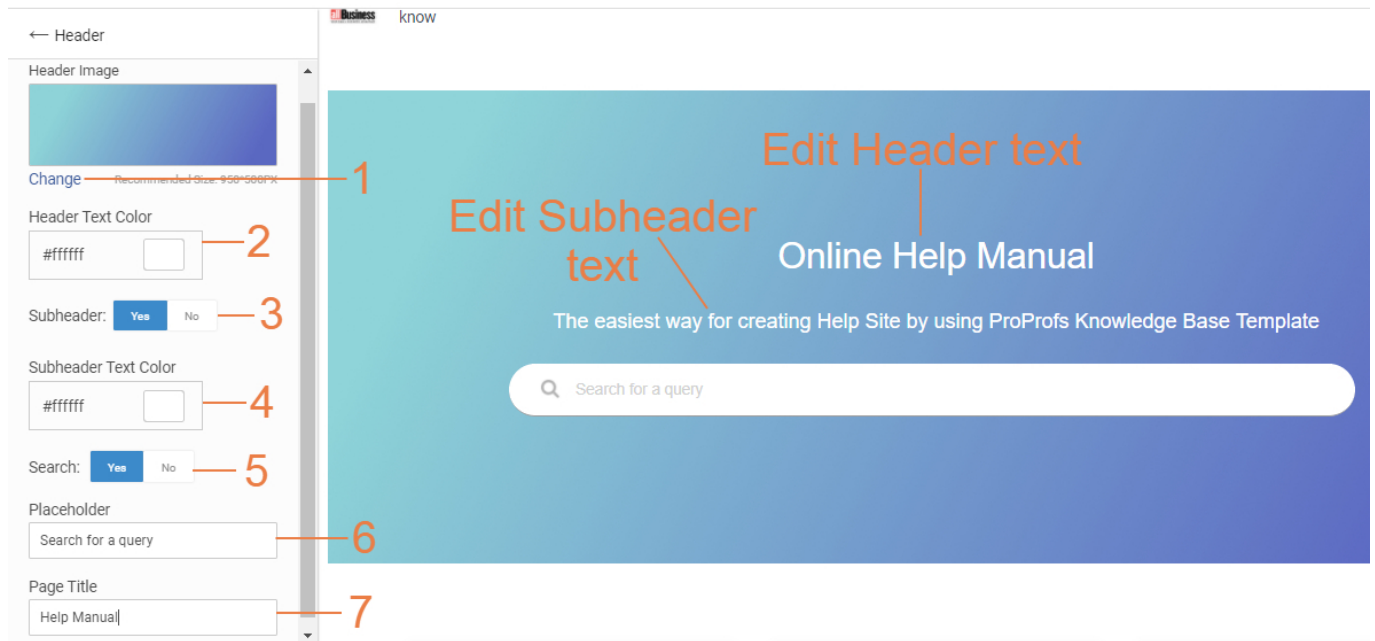
8. Add its **URL**.

9. Click **+New Link** to add more menu items. The screenshot below gives an example of how menus appear in your top header.



### 3. How to customize the header

The screenshot below has numberings on it, followed by details for each component on the header.



1. Click **Change** to edit the header image.
2. Customize the **header text color**.
3. Enable **Subheader**.
4. Customize the **subheader text color**.
5. Enable **Search**.
6. Customize the **placeholder** text for the search bar.
7. Customize the **page title**.

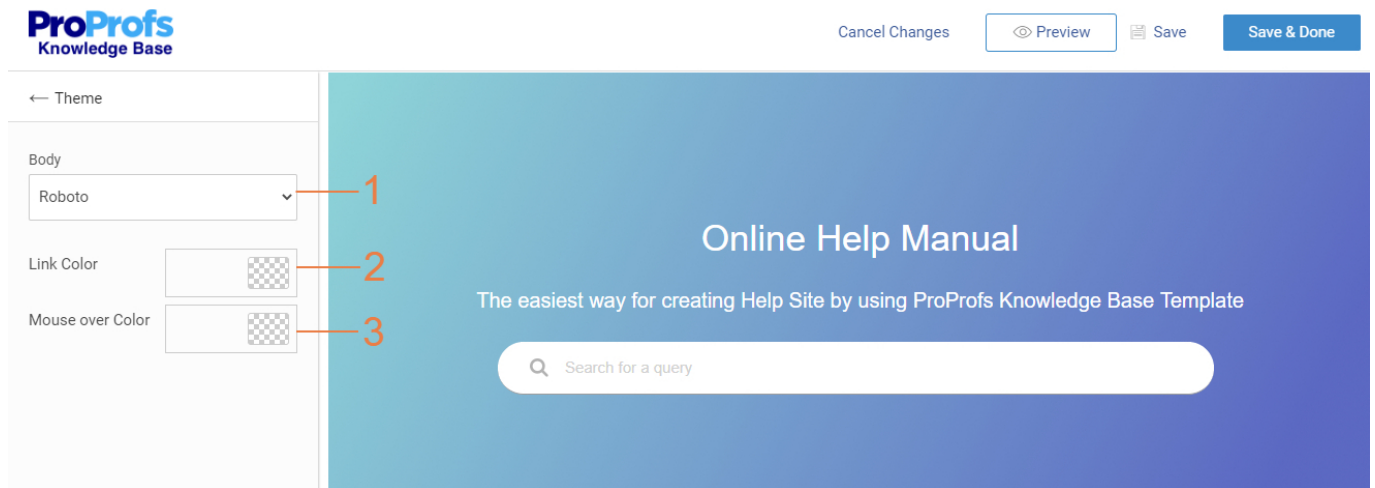
**Note:** The Header and Subheader text can be customized on the template itself, as shown in the screenshot above.

## 4. How to customize the theme

The **Theme** option allows you to:

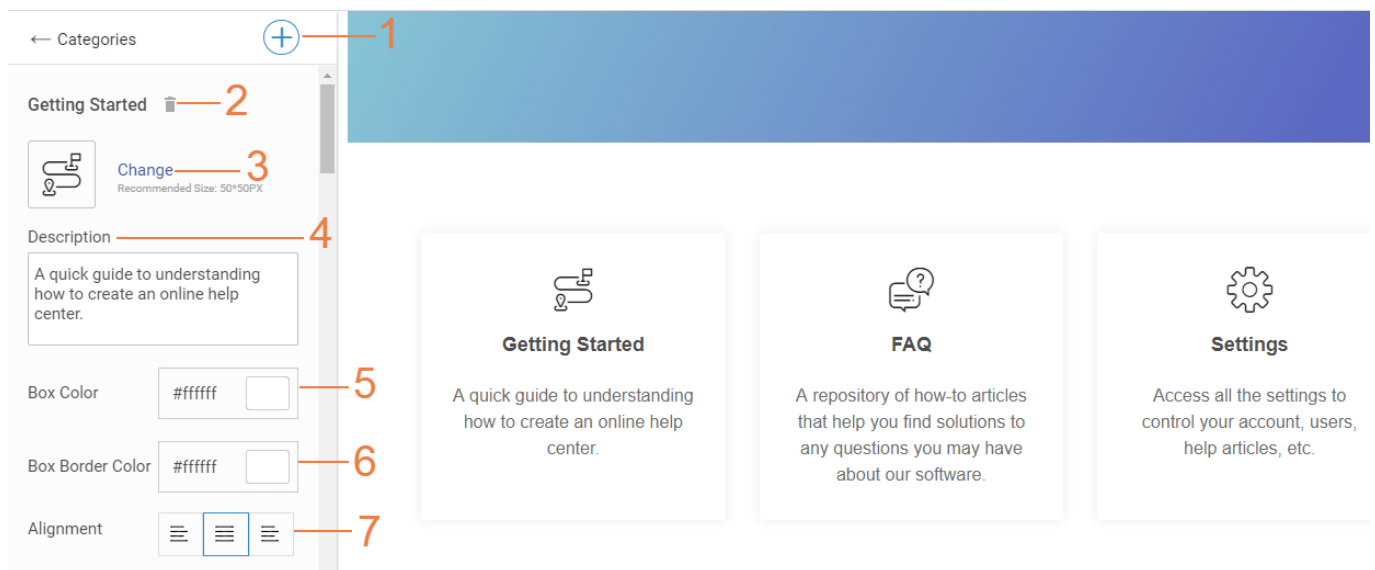
1. Change the font on the Homepage.
2. Customize the color of the text that is a hyperlink, if any.
3. Customize the text color of any buttons that get highlighted during a mouseover.





## 5. How to customize categories

**Categories** are folders in the Table of Content (on the left side of the page). These categories can also be viewed and accessed on the Homepage - for example, Getting Started, FAQ, Settings, etc. The screenshot below shows all their customization options.



1. Click on the **+** button to select the categories you want to add to the Homepage.
2. **Delete** this category from the Homepage.
3. Change the **icon** of a category.
4. Add a suitable **description** for this category.
5. Customize the **background color** of a category box.
6. Customize the **border color** of a category box.
7. **Align** the categories towards the left, center, or right of the Homepage.



## 6. How to add featured articles

**Featured articles** are help articles that can be added to the Homepage at its bottom, giving your website visitors access to useful content.

**Step 1.** To add articles on the Homepage:

1. Enable **Show Featured Articles**.
2. Customize the **title** 'Popular Articles' if you want.
3. Click **Manage Articles** to select articles that you want to feature on the Homepage.

ProProfs Knowledge Base

Cancel Preview Save & Done

← Featured Articles

Show Featured Articles — 1

Yes No

Title — 2

Popular Articles

Manage Articles — 3

### Popular Articles

- How to create a back-up?
- Product Key Features
- Where to download earlier version?

**Step 2.** Select the articles you want to add to the Homepage and click **Add**.

### Add Feature Article

#### Select Articles you want to add

- ☐ FAQ
- ☐ Getting Started
- ☐ Glossary
- ☐ How to Install
- ☐ How to configure Setting A
- ☐ How to configure Setting B
- ☒ How to create a back-up?
- ☐ Key Concepts
- ☐ PDFs & Videos

Add

Cancel

## 7. How to add recent articles

Your latest articles or pages are categorized as recent articles. To list them on the Home

page, follow the steps shown in the screenshot below.

The screenshot shows the ProProfs Knowledge Base configuration interface. On the left is a sidebar with the 'ProProfs Knowledge Base' logo and a 'Recent Articles' section. This section contains three numbered steps: 1. 'Show Recent Articles' with 'Yes' and 'No' buttons; 2. 'Title' with a text input field containing 'Recent Articles'; 3. 'Number of Articles to Show' with a text input field containing '6'. The main content area is titled 'Frequently Asked Questions' and lists two items: 'How to Configure Setting A?' and 'How to Configure Setting B?'. Below this is a section titled 'Recent Articles' which lists six items: 'What are the API limits?', 'Product Tour Videos', 'How to Configure Setting A?', 'How to Configure Setting B?', 'How to Integrate with Google Analytics?', and 'How to Integrate with ProProfs Live Chat?'. At the top right of the main area are buttons for 'Cancel', 'Preview', and 'Save & Done'.

1. Enable **Show Recent Articles**.
2. Customize the **title** 'Recent Articles' depending on your preference.
3. Enter the number of articles you want to appear as recent articles. You can view a maximum of ten recent articles.

## 8. How to add a Footer

The **Footer** is the bottom section of a webpage comprised of a variety of information that may include relevant social media links, product listing, copyright information, etc.

**Step 1.** You can either select a footer **template** and customize it or create a footer in **HTML/CSS**. To pick a template of your choice, click **Add** under 'Footer Style.'

The screenshot shows the ProProfs Knowledge Base configuration interface for the 'Footer' section. On the left is a sidebar with the 'ProProfs Knowledge Base' logo and a 'Footer' section. This section contains two steps: 1. 'Choose Footer Type' with 'Template' and 'Advanced' buttons; 2. 'Footer Style' with a text input field containing 'None' and an 'Add' button. Two orange arrows point to the 'Template' button and the 'Add' button. The main content area features a large image of a hand typing on a keyboard. Below the image are two columns: 'Get Started' with the text 'A quick guide to learning how to create an online help center.' and 'Settings' with the text 'Access all the settings to control your account, users, help articles, etc.'

**Step 2.** Select the preferred footer style and click **Save**.

Library

Home About Contact

©2020 Company Name, Inc. All Rights Reserved.

Home About Contact

©2020 Company Name, Inc. All Rights Reserved.

Home About Contact

©2020 Company Name, Inc. All Rights Reserved.

Save

Cancel

**Step 3.** Continue to customize the **background color**, **copyright notice**, **footer links**, and **social links** according to your requirements. You can also disable footer links and social links if you want. Click **Save & Done** to finish customizing the Homepage.

Cancel

Preview

Save & Done

Footer

Copyright Notice

©2020 Company Name, Inc. All Rights Reserved

Footer Links:

Yes No

Menu Color

#ffffff

Link 1

Text

Home

Add Url

Add Url

+ New Link

Social Links

Yes No

A quick guide to learning how to create an online help center.

Access all the settings to control your account, users, help articles, etc.

A repository of how-to articles to help you find solutions about any questions you may have about our software.

Popular Articles

- Does Knowledge Base Supports Data Portability
- How to Integrate with Google Analytics?
- How to Integrate with ProProfs Live Chat?
- Prepare your Knowledge Base for GDPR

Home

©2020 Company Name, Inc. All Rights Reserved

Alternatively, you can [create a Footer through HTML/CSS](#) by clicking the **Advanced** button.



← Footer

### Choose Footer Type

Template

Advanced

Advanced

Edit HTML/CSS

### Related Articles:

- [How to Add Your Company Logo to Your Knowledge Base?](#)
- [How to Add, Edit, and Delete a Page?](#)
- [How to Add, Copy, and Delete a Folder?](#)

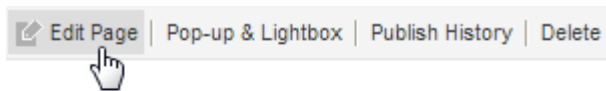
# Edit or Delete a Page

You can edit or delete a page you create for your site.

- [Edit a Page](#)
- [Edit Conflicts](#)
- [Delete a Page](#)

## Edit a Page

While viewing the page, click **Edit Topic** from the toolbar.



## Getting Started

This guide will give you step-by-step instructions

This will open the page in the content editor. Once you are finished making changes, click **Save**, then **Cancel**.

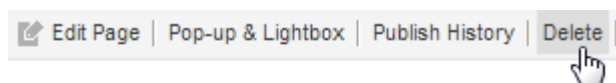
## Edit Conflicts

If you have multiple users working on your site at the same time, ProProfs has a built-in safeguard against any conflicts this might cause. If you begin editing a page that someone else is working on, a warning will display letting you know who is already editing that page. It is a good idea to exit the page and come back later. However, you can still continue editing the page.

## Delete a Page

You can delete pages in two ways:

1. While viewing the page, click **Delete** from the toolbar.



## Getting Started

This guide will give you step-by-step instructions

2. From the [All Pages](#) table, you can delete multiple pages at the same time.

You will need to confirm that you want to delete the page.

Pages are not permanently deleted. The page will be moved to the trash can. To permanently delete a page, you have to delete the page from the trash can in the [All Pages](#) table.

The ability to publish pages depends on the [user's role](#).

#### Related Articles:

[How to Add and Publish a Page](#)

[Recover a Deleted Page](#)

[View All Pages](#)

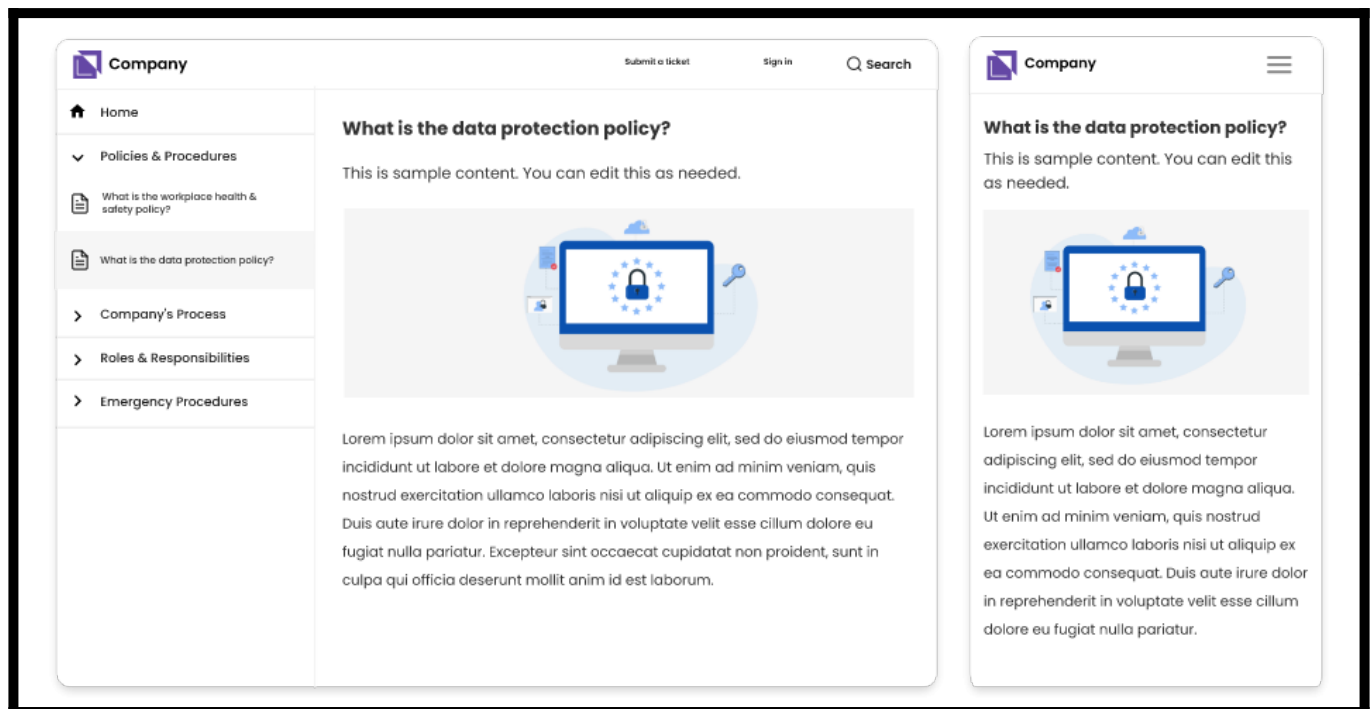
# How to Add/Delete, Edit, or Copy a Page

In your ProProfs Knowledge Base editor, you can easily add/delete, edit, or copy a page to enhance the qualitative attribute of the help section on your websites and deliver a better user experience.

## Multiple page actions allow you to

- Add pages for specific content and delete irrelevant or outdated information.
- Optimize the page content using the edit option.
- Save time and effort by copying the same format for pages with similar intent.

Here's how a page will appear in the Knowledge Base.



In this article, you will learn

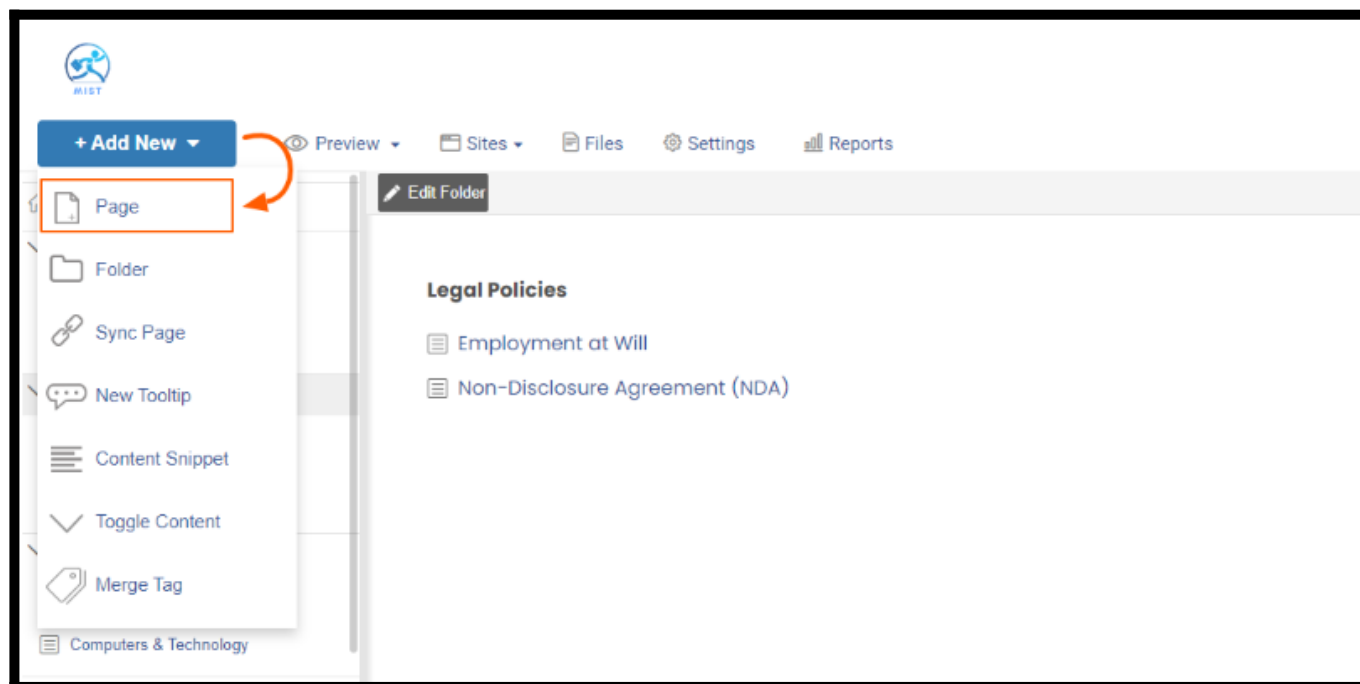
1. [How to Add/Delete a Page](#)
2. [How to Edit a Page](#)
3. [How to Copy a Page](#)

## How to Add/Delete a Page

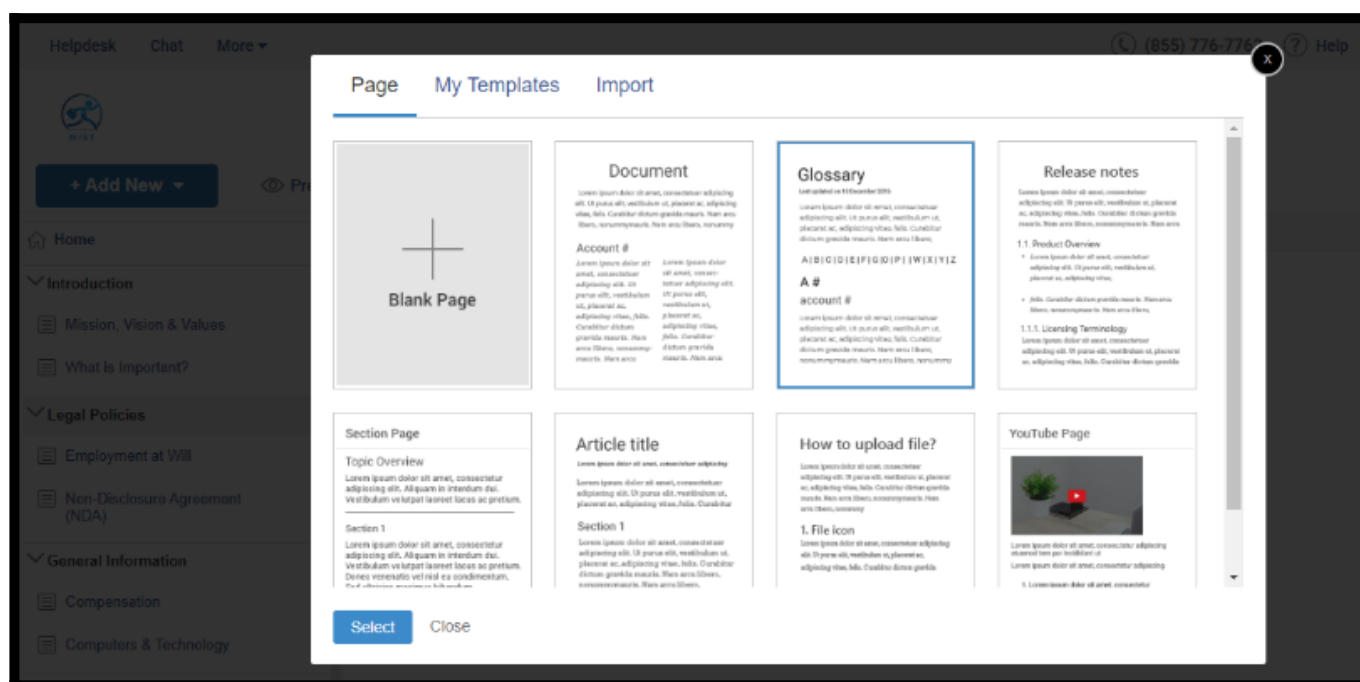
For adding a page,

**Step 1:** Select the folder category where you wish to add a page from the sidebar.

**Step 2:** Click **+Add New >> Page**.



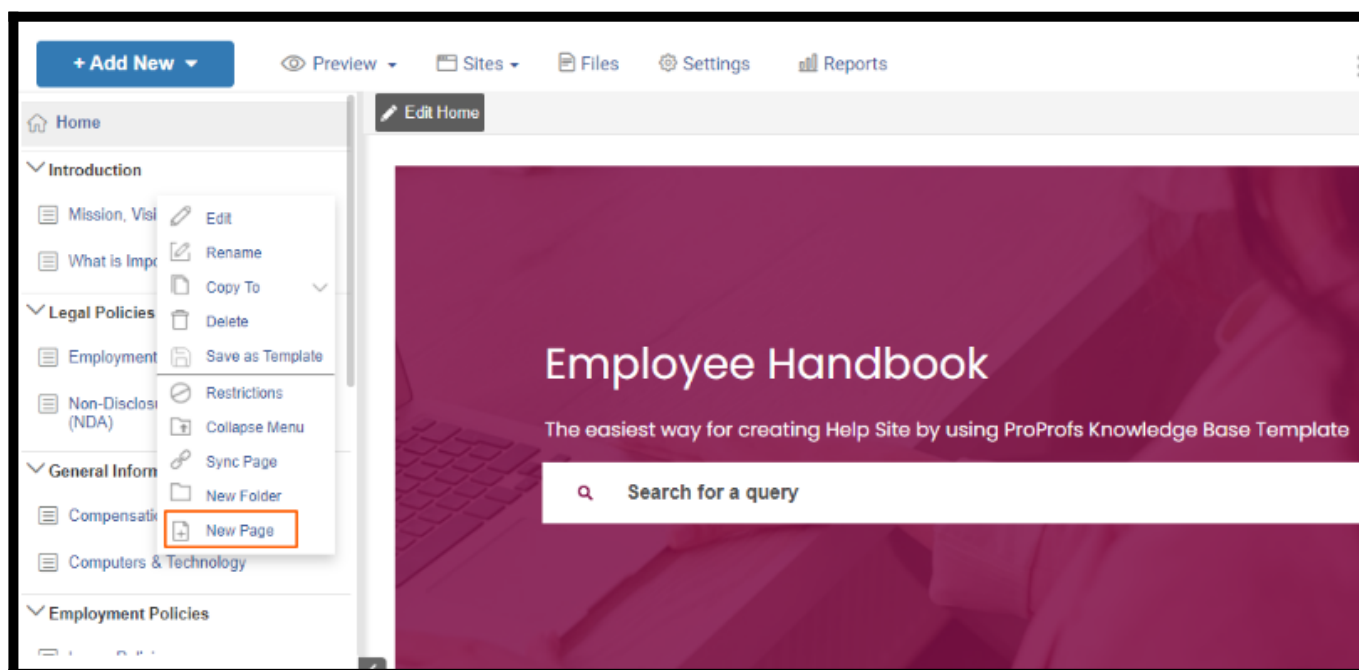
**Step 3:** You can create from scratch or choose a page template.



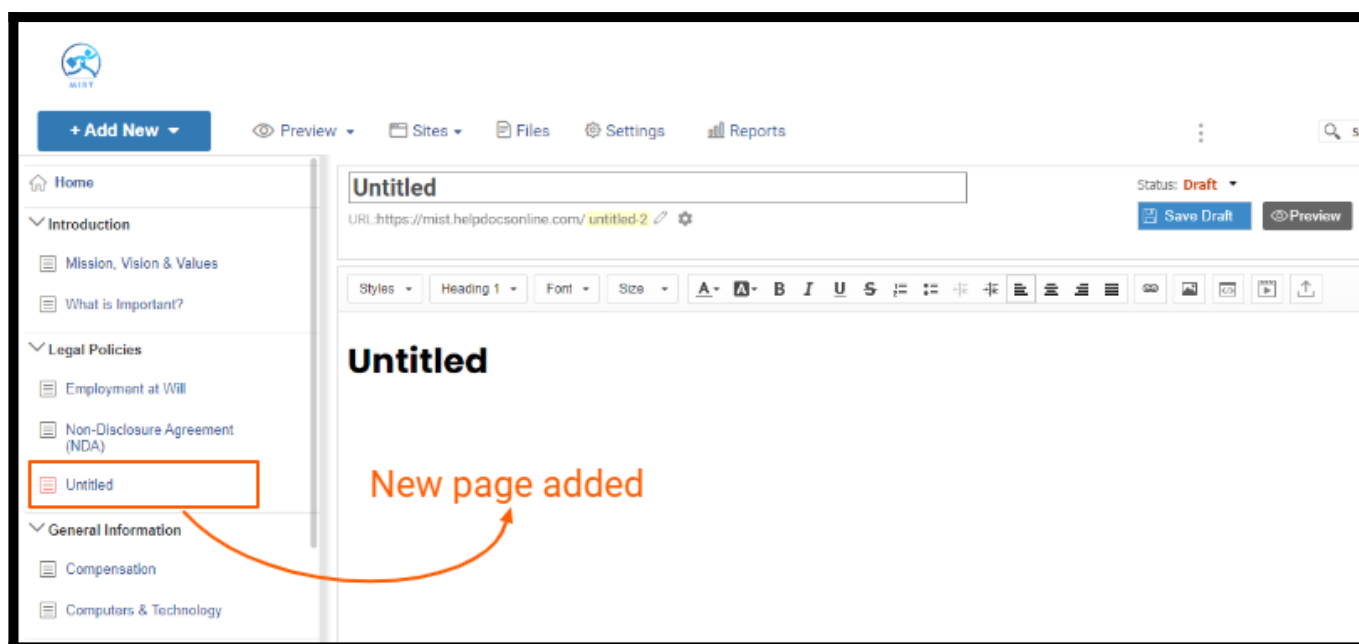
You can see the page added in the desired folder.

Alternatively, click settings in the **folder category** and select '**New Page.**'





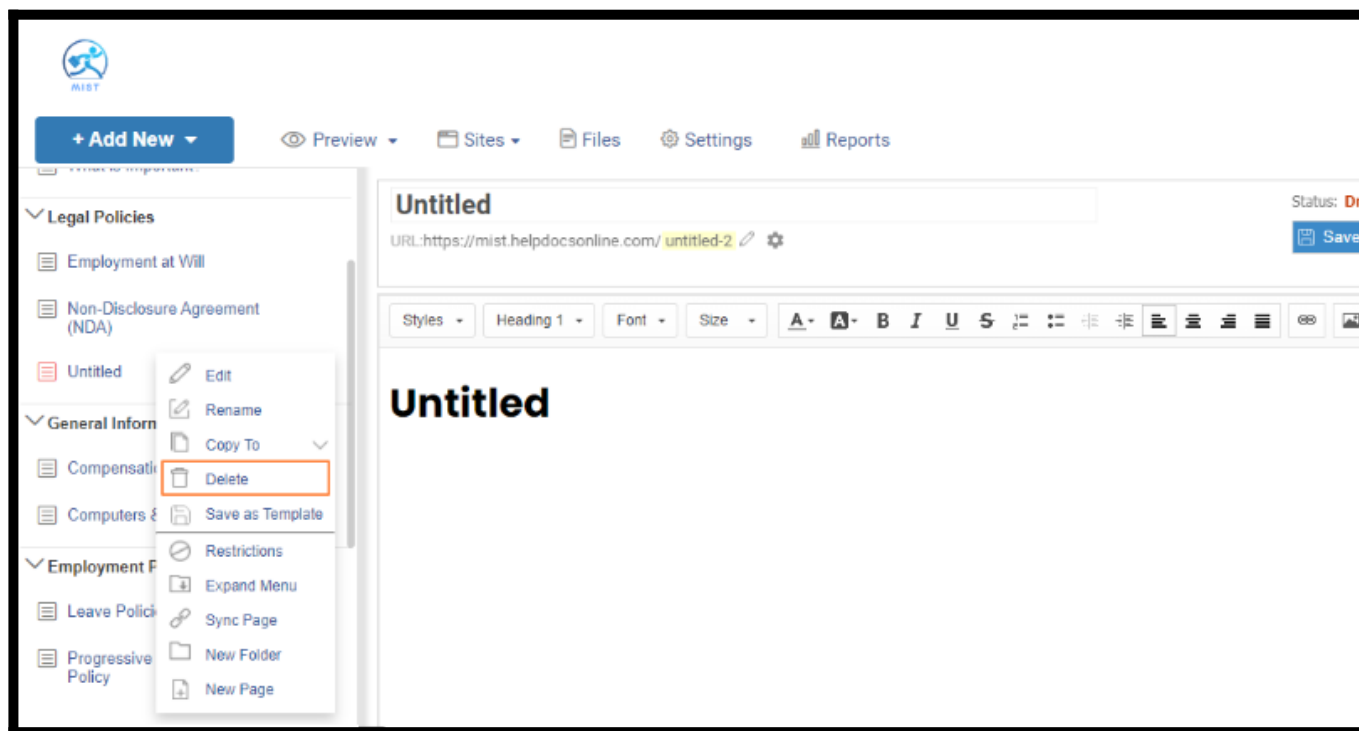
Here is how your page appears in the Table of Contents.



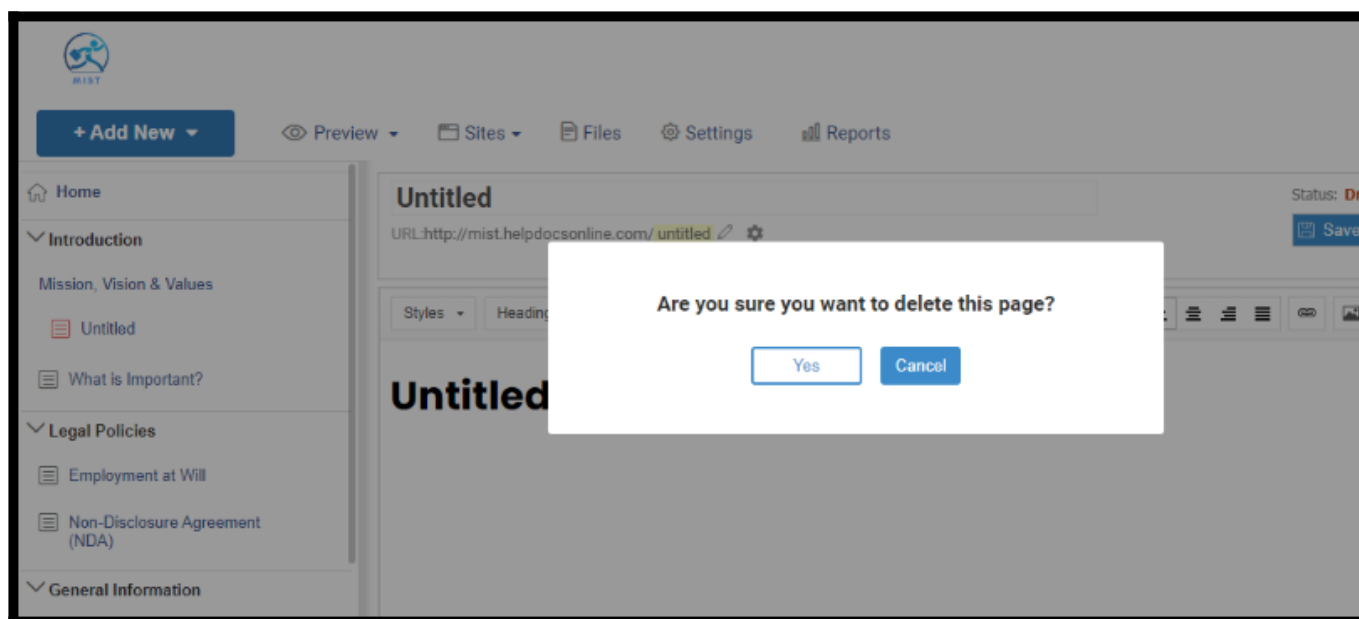
For deleting a page

**Step 1:** Hover the mouse to the page and click the settings icon on the sidebar.

**Step 2:** Click 'Delete.'



**Step 3:** Confirm to delete the page.



**NOTE:** Pages are not permanently deleted. The Knowledge Base will move it to the vault. You can either delete the page permanently or restore the page.

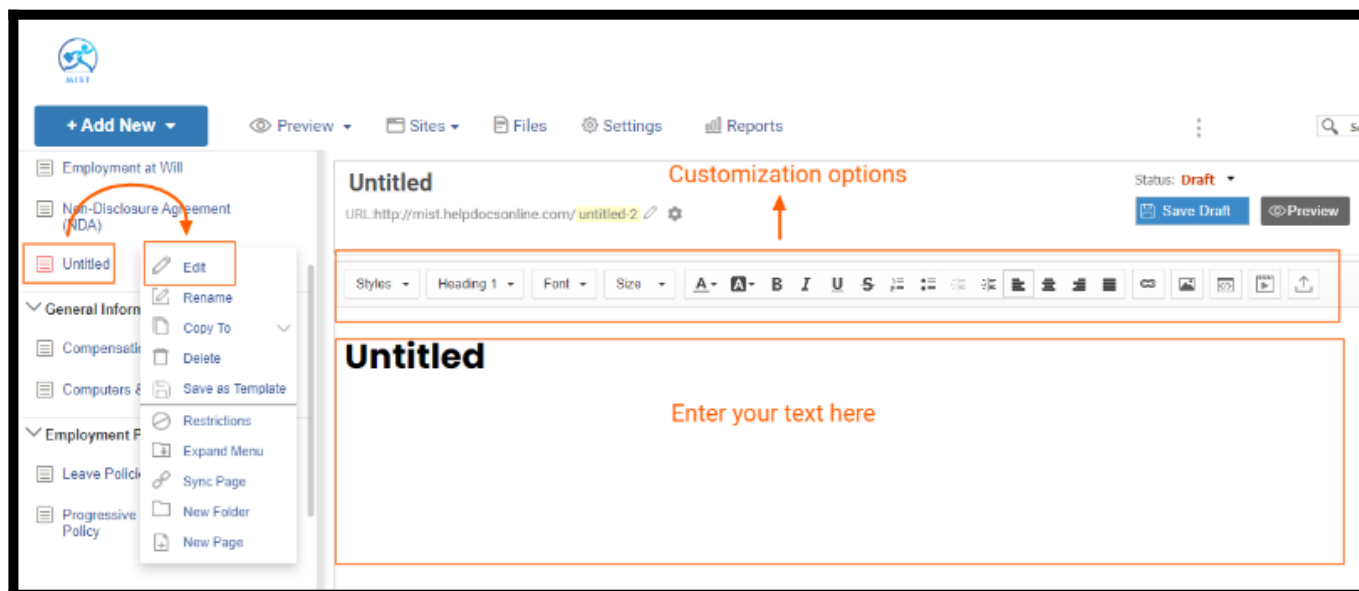
## How to Edit a Page

**Step 1:** Hover the mouse to the page and click the settings icon on the sidebar. Click 'Edit.'

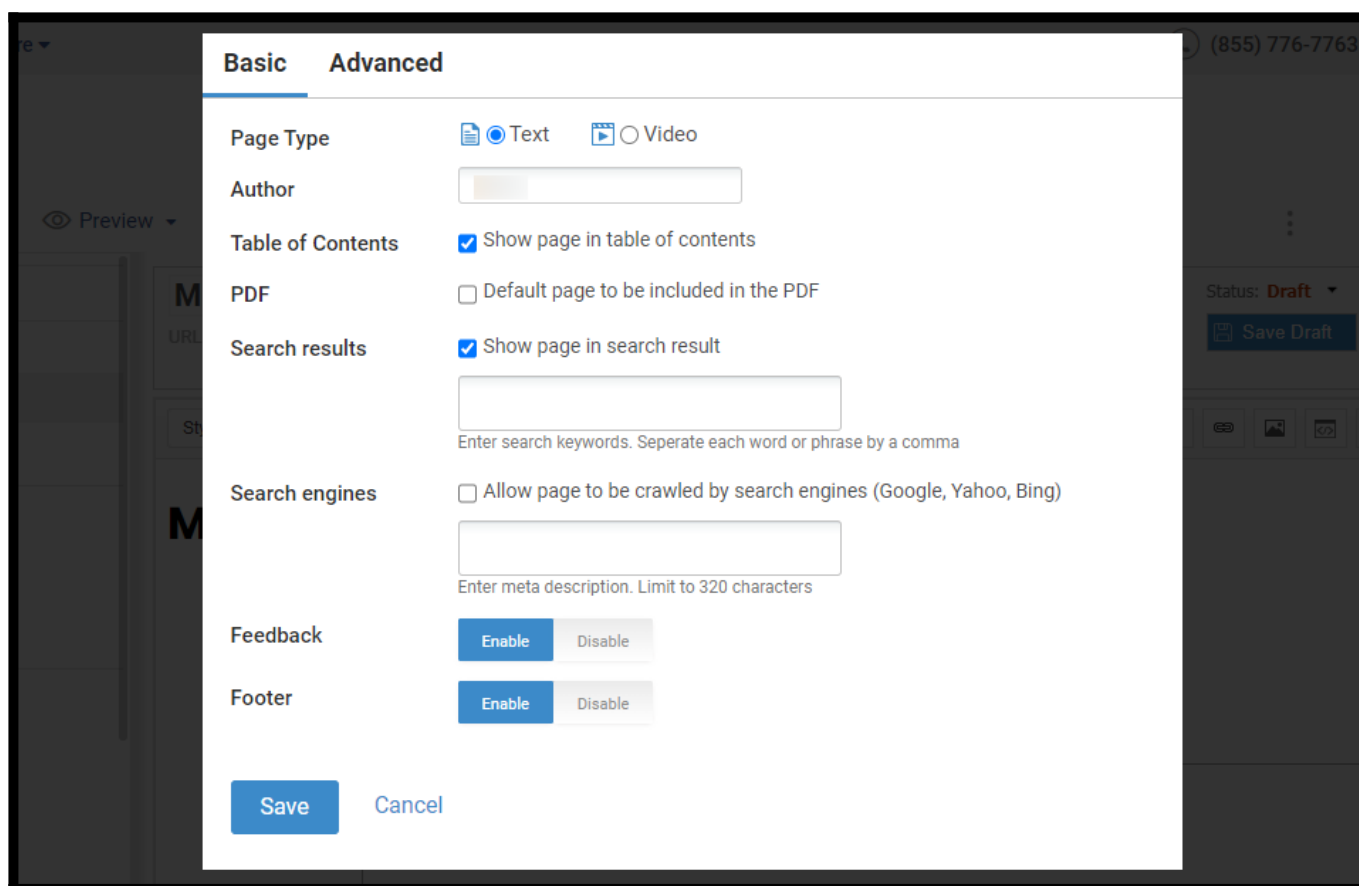
**Step 2:** Add the content.

**Step 3:** Style the content with the customization options or import the content directly.

**Step 4:** Add images or videos to the content, where required.



**Step 5:** In the **page settings**, you can enter SEO keywords, meta description, author name for the page, and more. You can set the page type as text or video and like to appear the page in the Table of Content, etc.



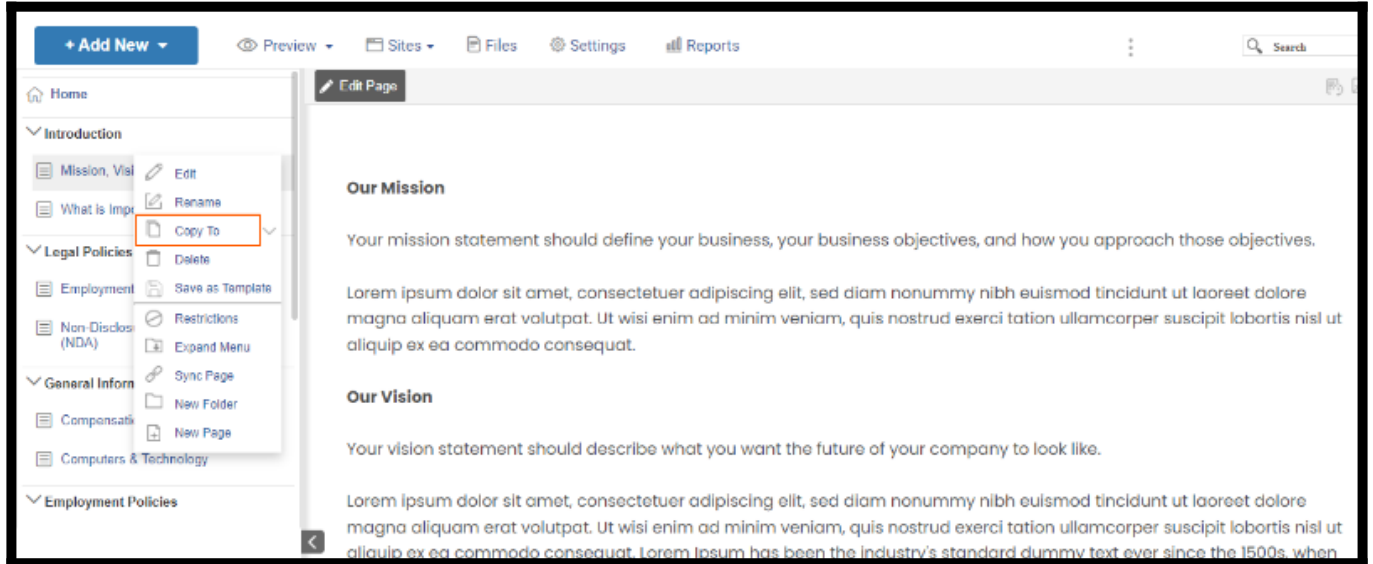
Once you're done editing the page, save the draft and update it to publish.

**NOTE:** If the user begins editing a page that someone else is working on, a warning will be displayed, letting you know who is already editing that page. It is a good idea to

leave the page and come back later. However, you can continue editing the page.

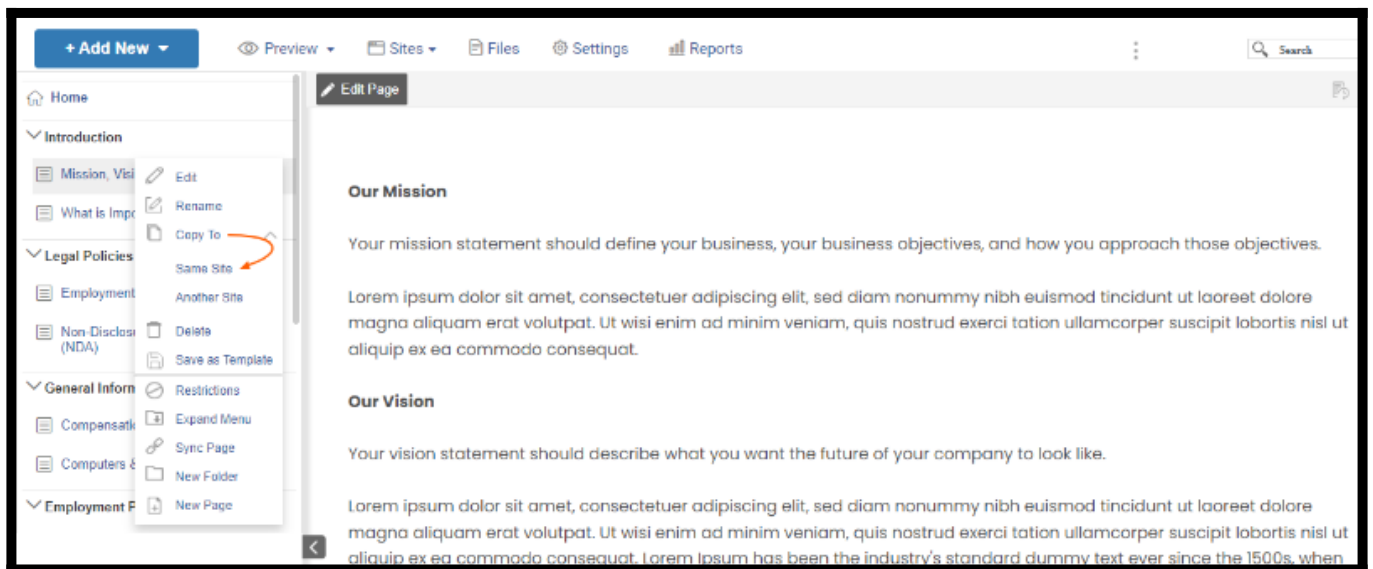
## How to Copy a Page

**Step 1:** Right-click on the page in the **Table of Content** of which you wish to create the copy.



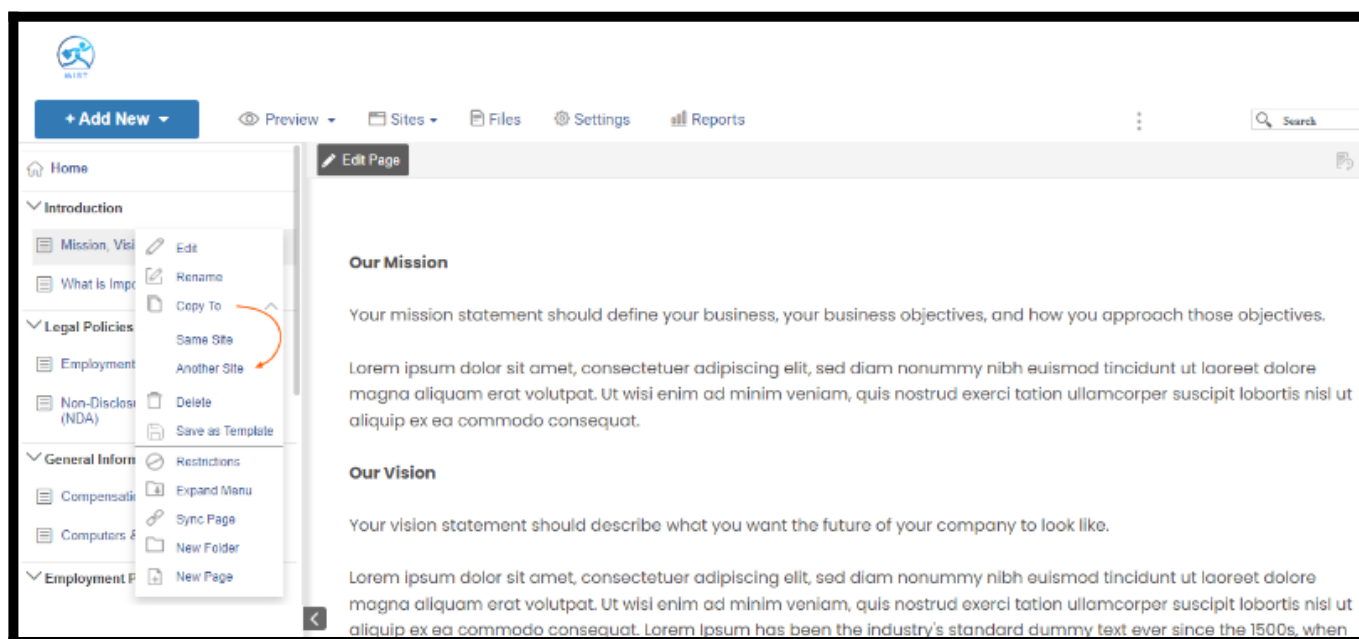
**Step 2:** To create a copy for the same site,

- Click the drop-down arrow next to the 'Copy To' option.
- Select 'Same Site.' A new draft of the page is created.

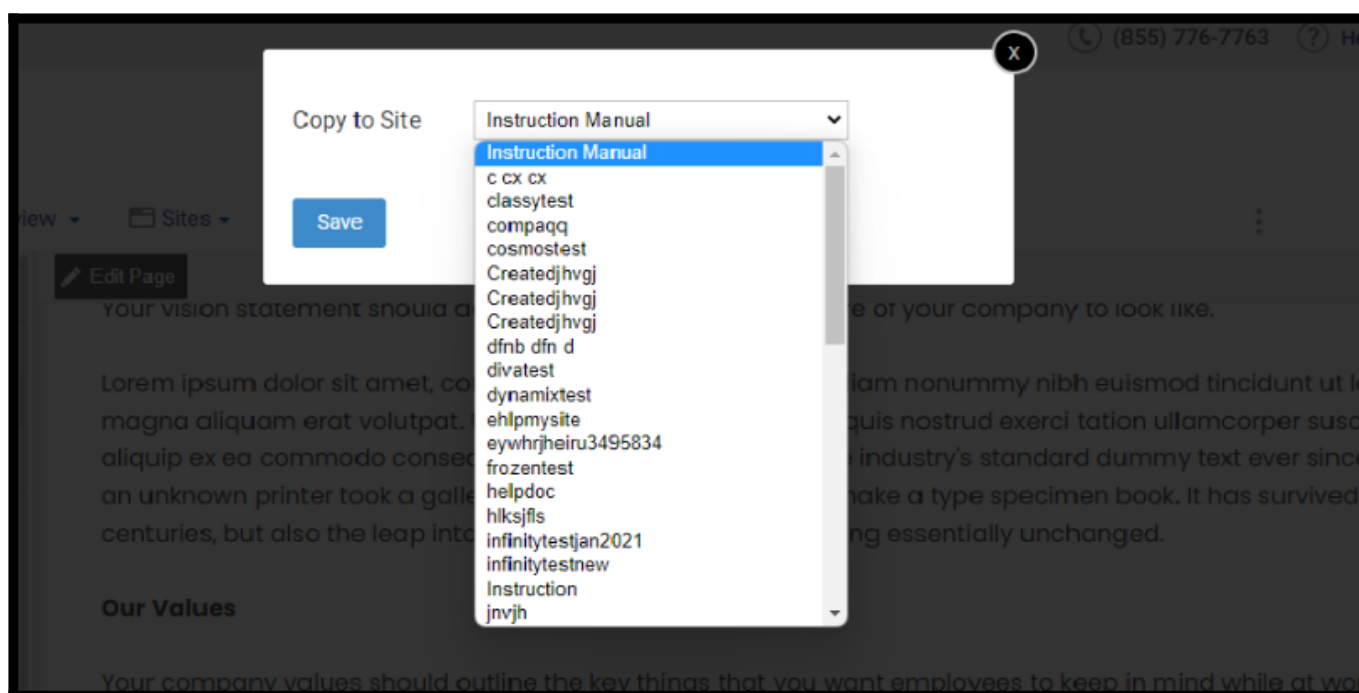


To create a copy for another site,

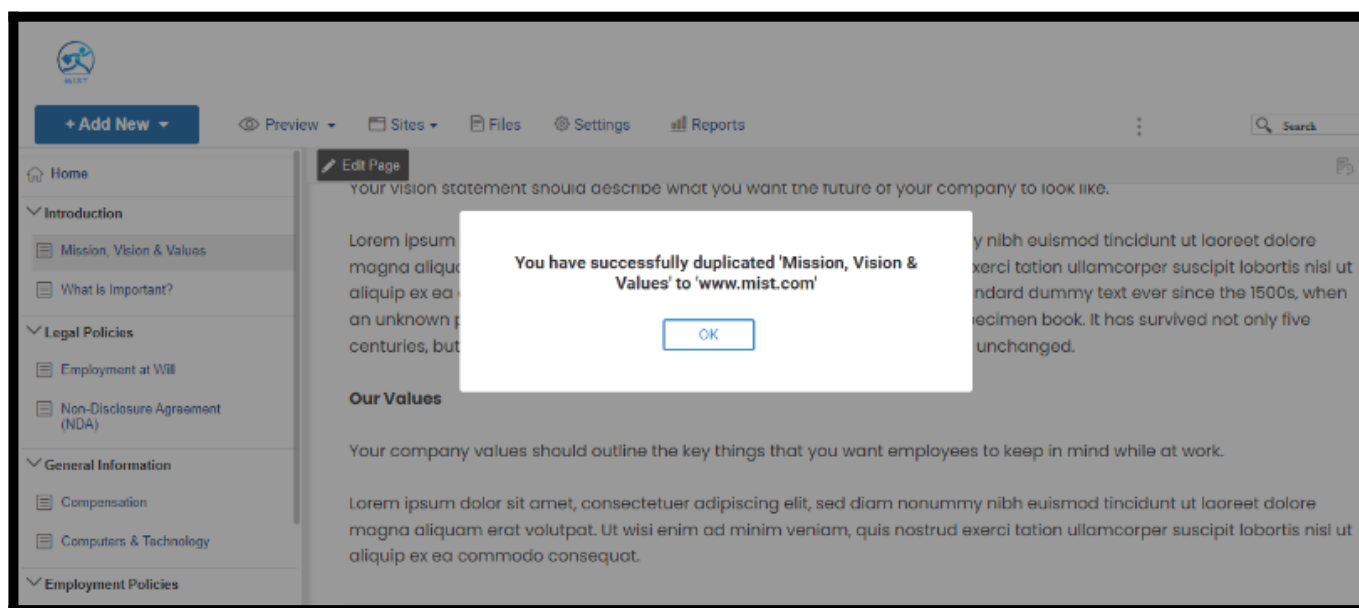
- Click the drop-down arrow next to the 'Copy To' option.
- Select 'Another Site.'



- Choose the site from the drop-down in the overlay box.
- Click 'Save.'



You will get a confirmation message.



*That is all about various page actions in the ProProfs Knowledge Base.*

### Related Articles:

- [How to Customize Your Knowledge Base Home Page](#)
- [How to Add, Copy, and Delete a Folder](#)
- [How to add a Sync Page](#)

# How to Add, Copy, and Delete a Folder

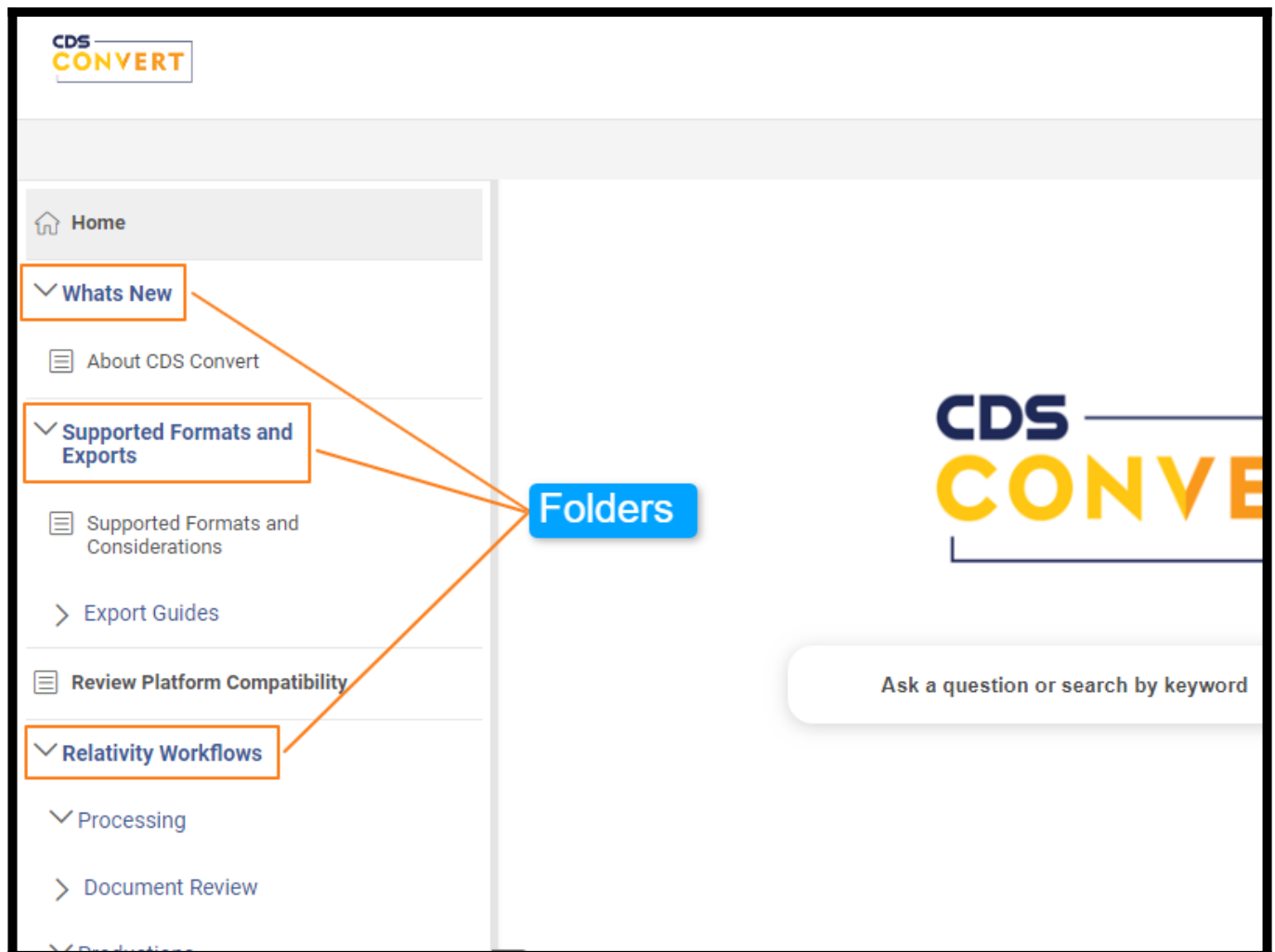
With ProProfs Knowledge Base, you can **organize and group pages** in folders. You can also **create hierarchies** of folders and pages. Additionally, you can rename, copy, add restrictions, hide the folder, and enable/disable the URLs for folders.

**Note:** Folders that are empty or have no published content will not be visible to end-users.

## Benefits of managing folders:

- Group pages under similar categories
- Maintain a hierarchy in the knowledge base
- Enable/disable the folder without hampering the hierarchy

Here's a preview of how folders appear in a knowledge base:

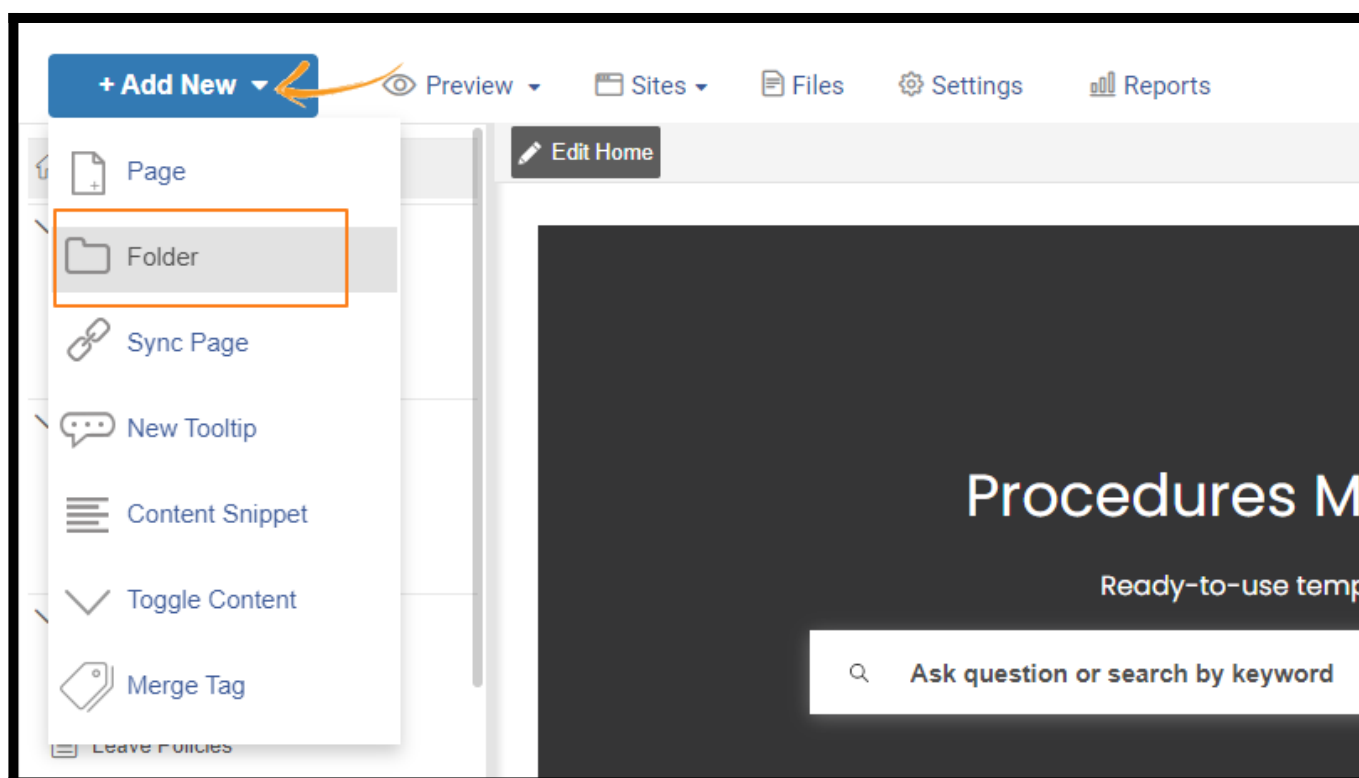


In this article, you will learn:

1. How to Add a Folder
2. How to Copy a Folder
3. How to Delete a Folder
4. Other Folder Management Settings

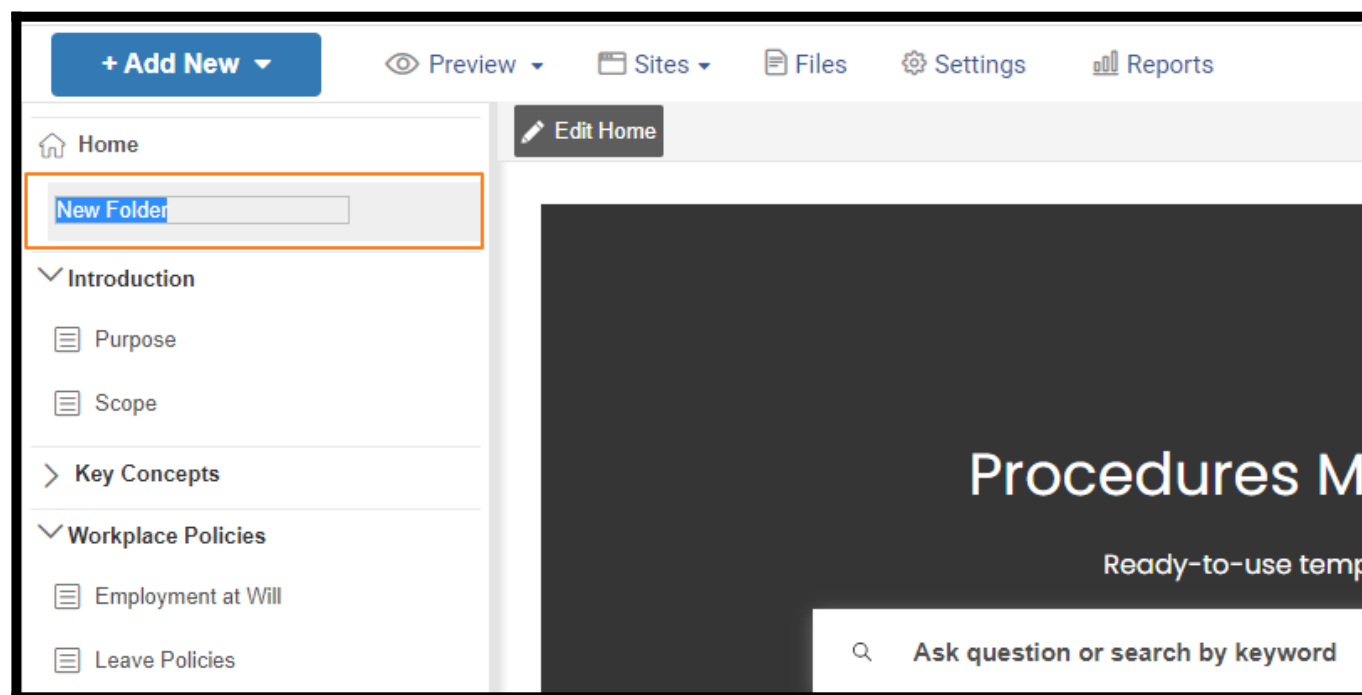
## How to Add a Folder

**Step 1:** On your ProProfs Knowledge Base dashboard, go to **+ Add New > Folder**.



**Step 2:** Click the icon and select **Rename**. Type the name of your folder and hit **Enter** or click **outside** the text input to **save** the folder name.

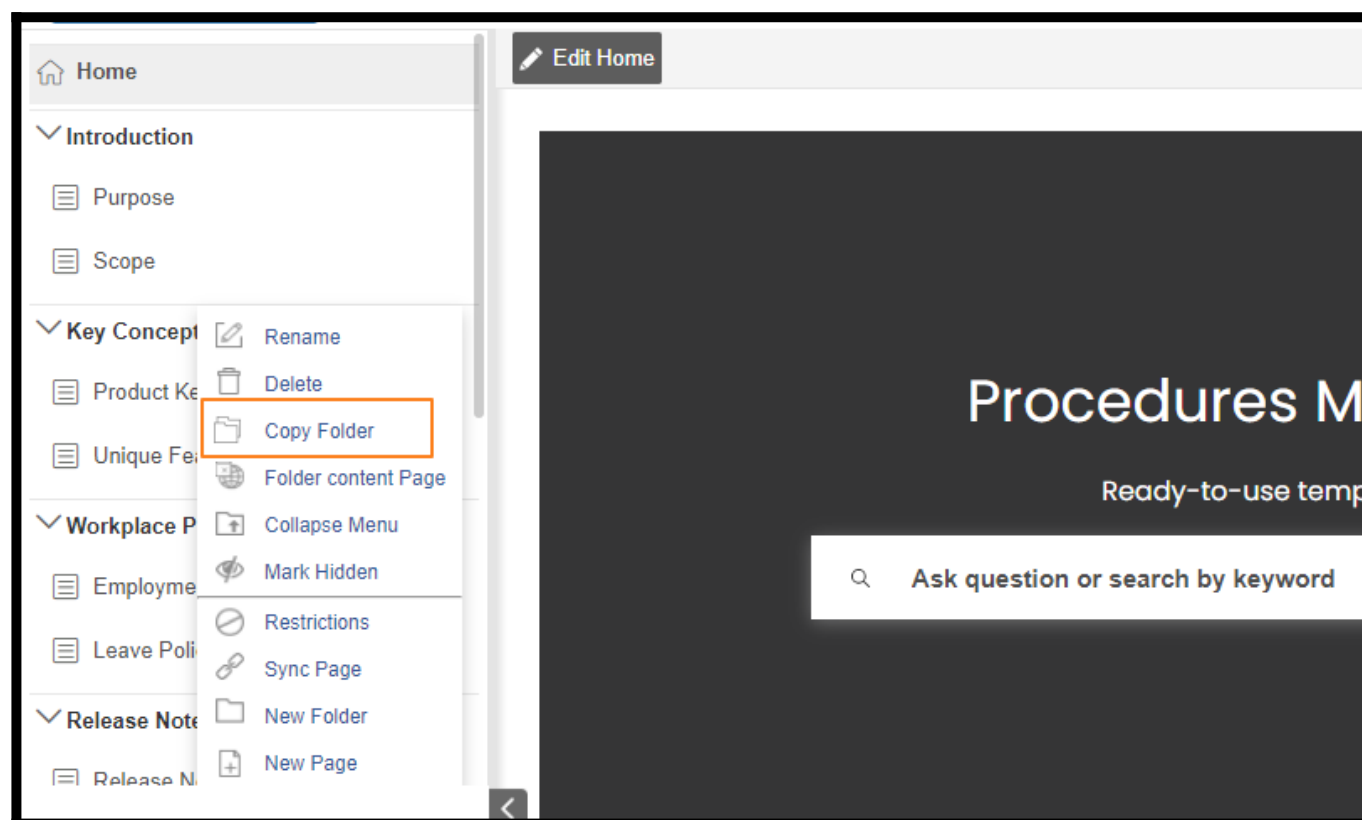




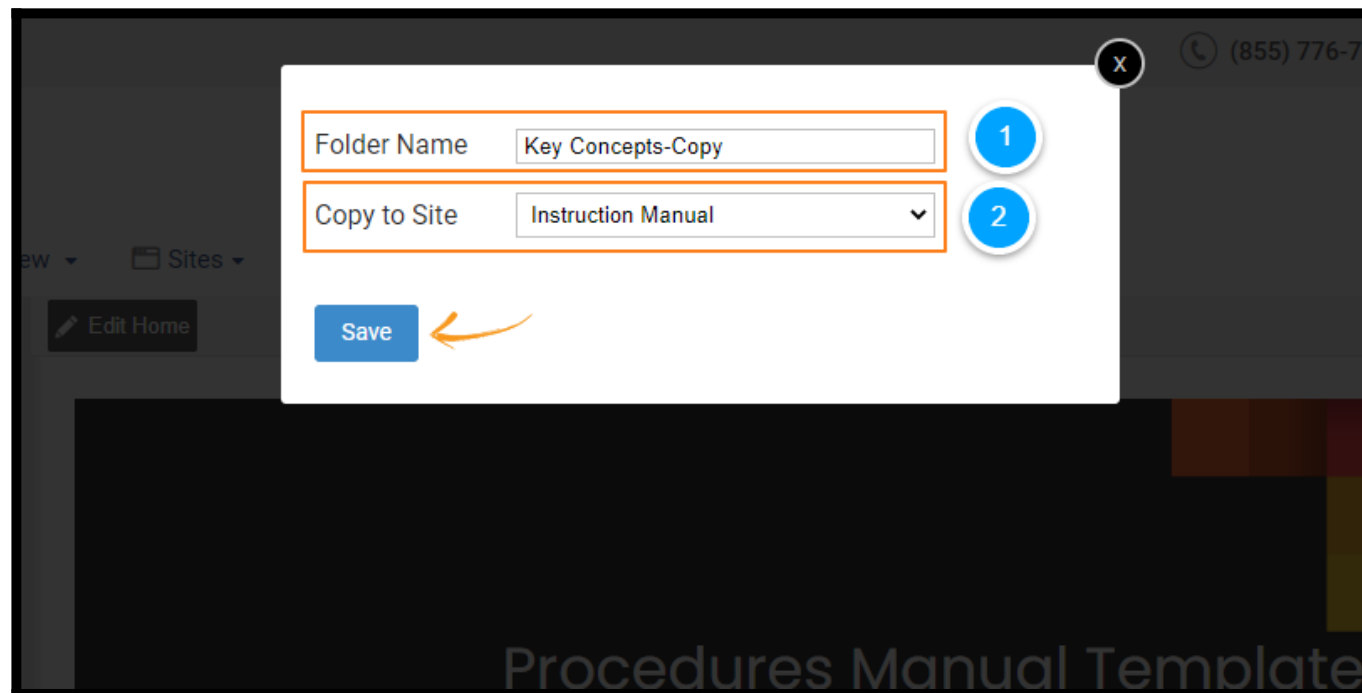
## How to Copy a Folder

**Step 1:** Hover over the folder name and click on the gear icon. Select **Copy Folder**.

*Alternatively, right-click on the folder name and click **Copy Folder**.*



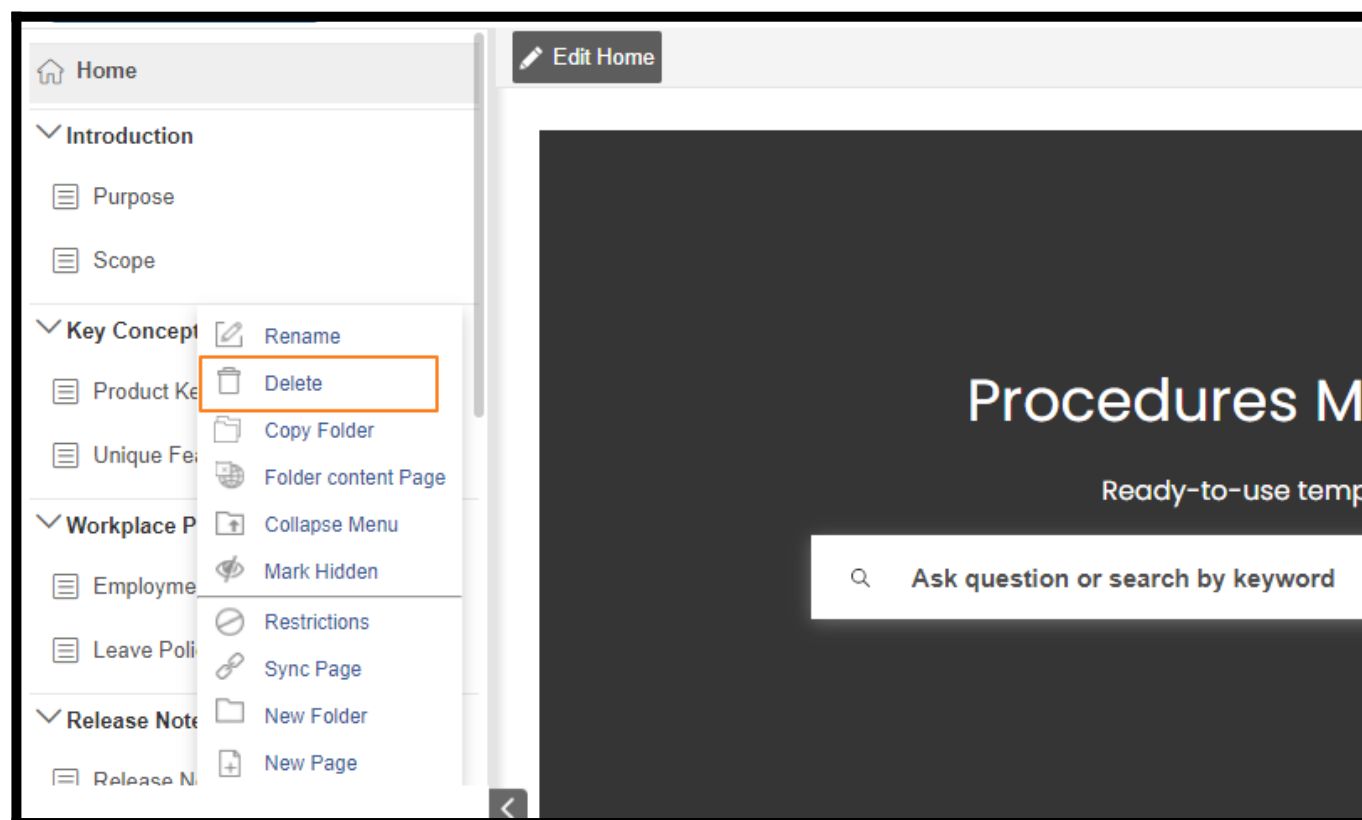
**Step 2:** Provide the **folder name** and **select the help site** where you want to copy the folder. Click **Save**.



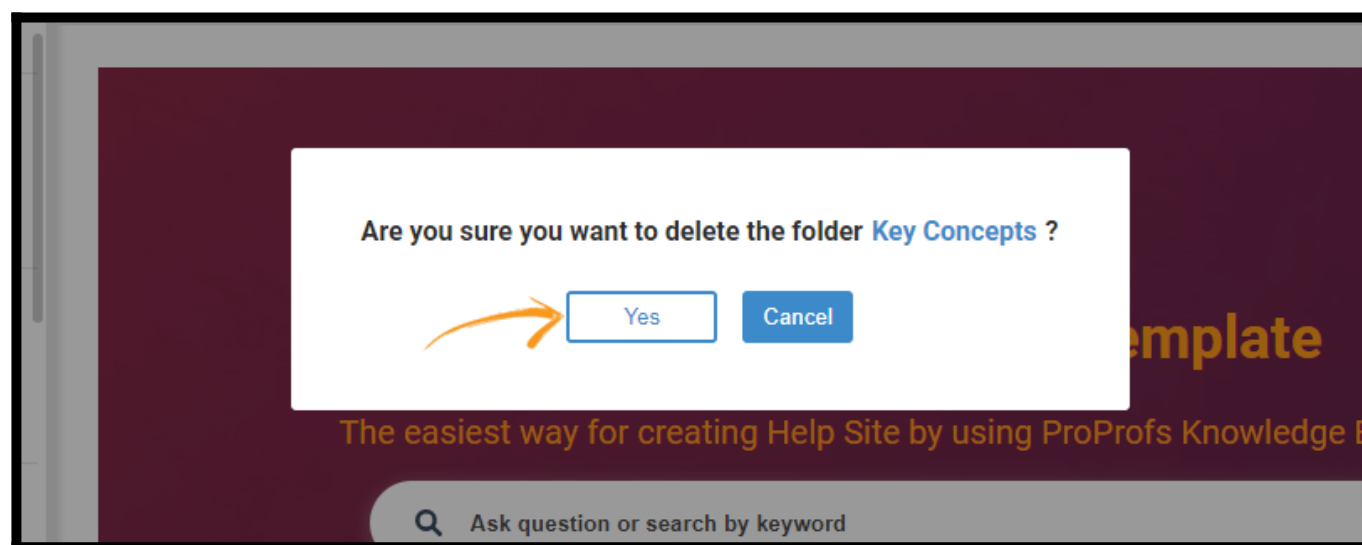
The screenshot displays a ProProfs Knowledgebase interface. A modal dialog is open, allowing the user to add a new folder. The dialog contains two input fields: 'Folder Name' with the text 'Key Concepts-Copy' and 'Copy to Site' with a dropdown menu showing 'Instruction Manual'. A blue 'Save' button is located at the bottom left of the dialog, with an orange arrow pointing to it. The background shows a dark sidebar with 'Edit Home' and 'Sites' options, and a main area with 'Procedures Manual Template' text. A contact number '(855) 776-7' is visible in the top right corner.

## How to Delete a Folder

**Step 1:** Hover over the folder name and click on the gear icon. Select **Delete**.  
Alternatively, right-click on the folder name and click **Delete**.



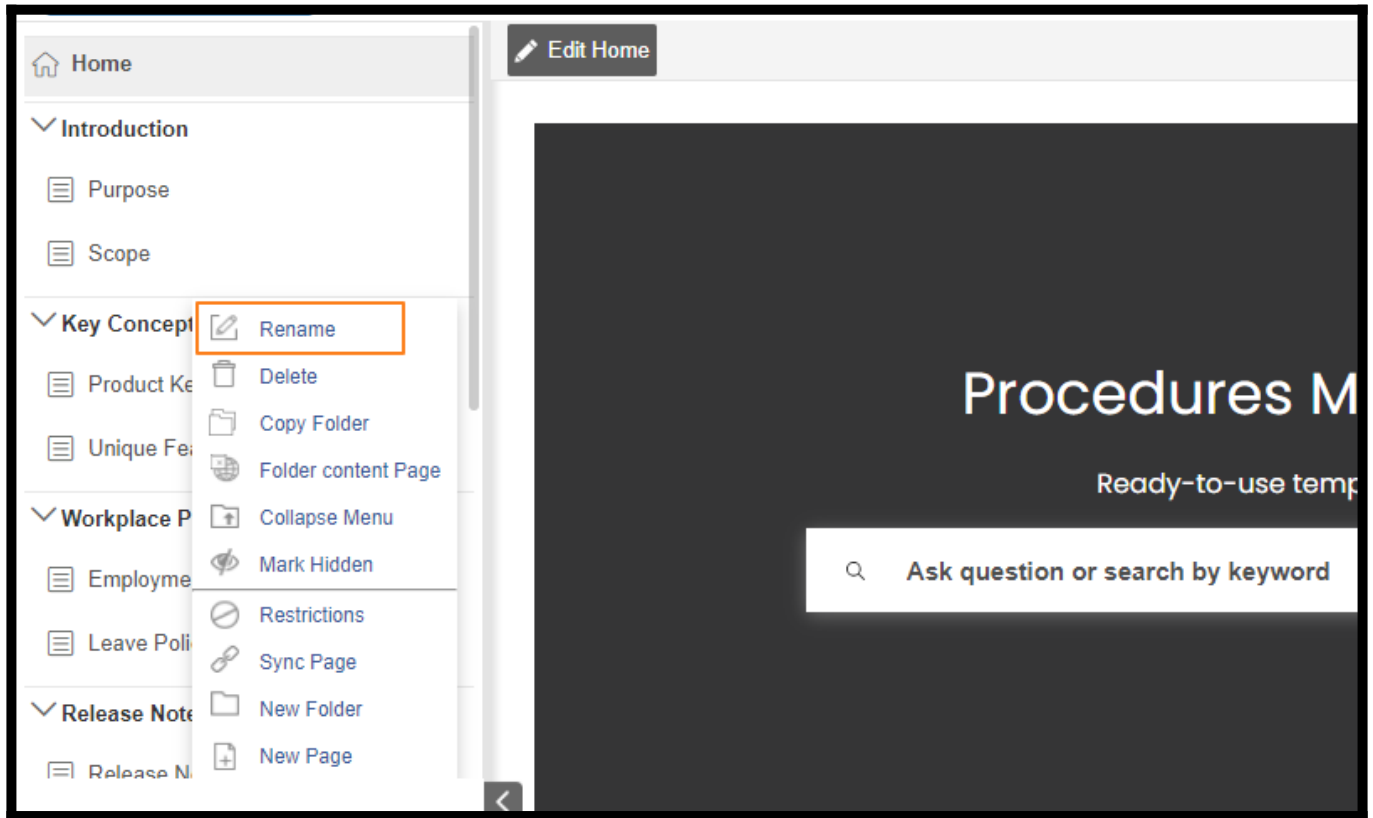
A confirmation message will appear asking for your consent to delete the folder. Click **Yes**.



## Other Folder Management Settings

### How to Rename a Folder

**Step 1:** Hover over the folder name and click on the gear icon—select **Rename**.  
Alternatively, right-click over the folder name and click **Rename**.



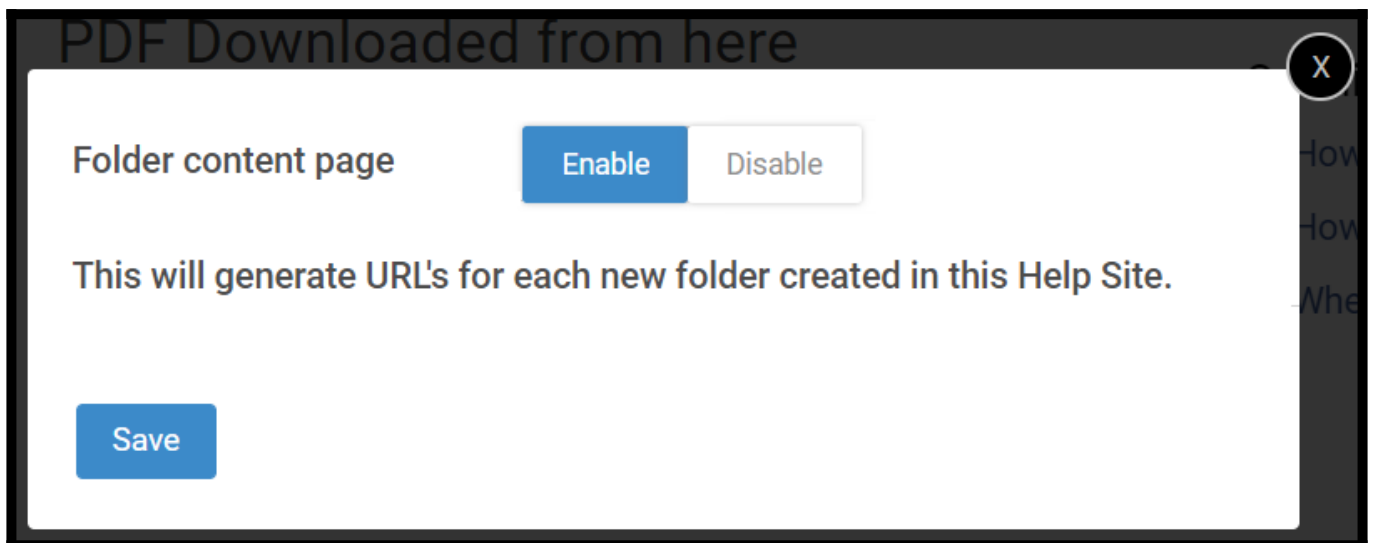
**Step 2:** Enter the name and click outside the text input to save the folder name.

## How to Enable/Disable Folder Content Page

You can enable or disable the folder content page. The folder content page ensures your folders have URLs similar to a help page.

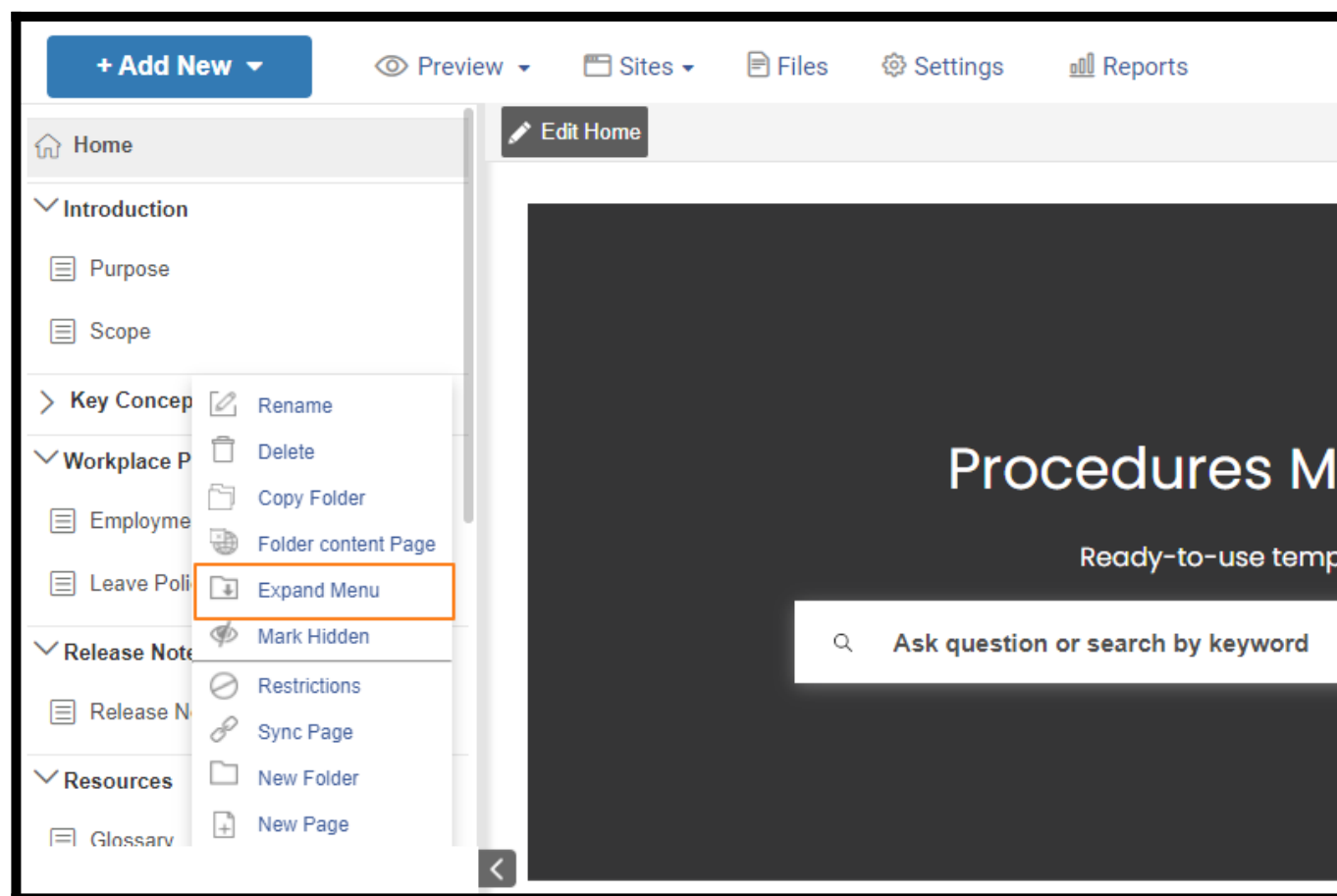
The folder content page is always enabled by default. You can disable the same by right-clicking on the folder name and selecting **Folder Content Page**.

Select **disable** and click **Save**.



## How to Expand/Collapse Menu

By default, folders in the TOC will remain collapsed after the page loads. If you want to keep the folder open by default after page loading, click **Expand Menu**.



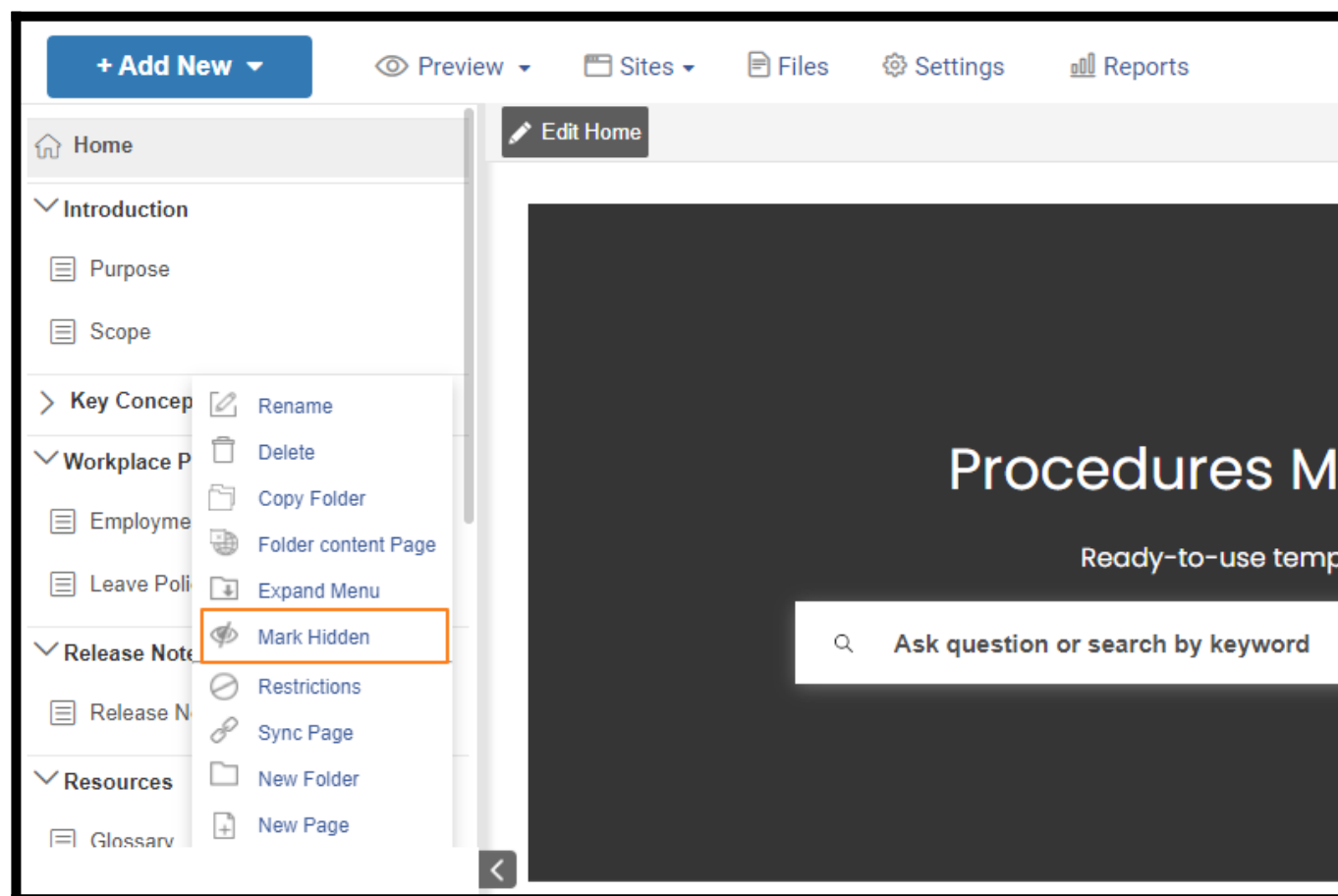
If the folder is open and you want to keep it closed by default after loading, then right-click on the folder and select **Collapse Menu**.

## How to Hide a Folder

You can easily hide a folder and all the items inside it. Only logged-in users can see the hidden folders.

Hover over the folder name, click the gear icon and select **Mark Hidden** to hide a folder.

*Alternatively, you can right-click on a folder and then click **Mark Hidden**.*



If you want to make the hidden folder visible, hover over the folder name, click the gear icon, and select the **Mark Visible** option.

*Alternatively, you can right-click on the folder name and click **Mark Visible**.*

*That is all about creating and managing folders in ProProfs Knowledge Base.*

### Related Articles:

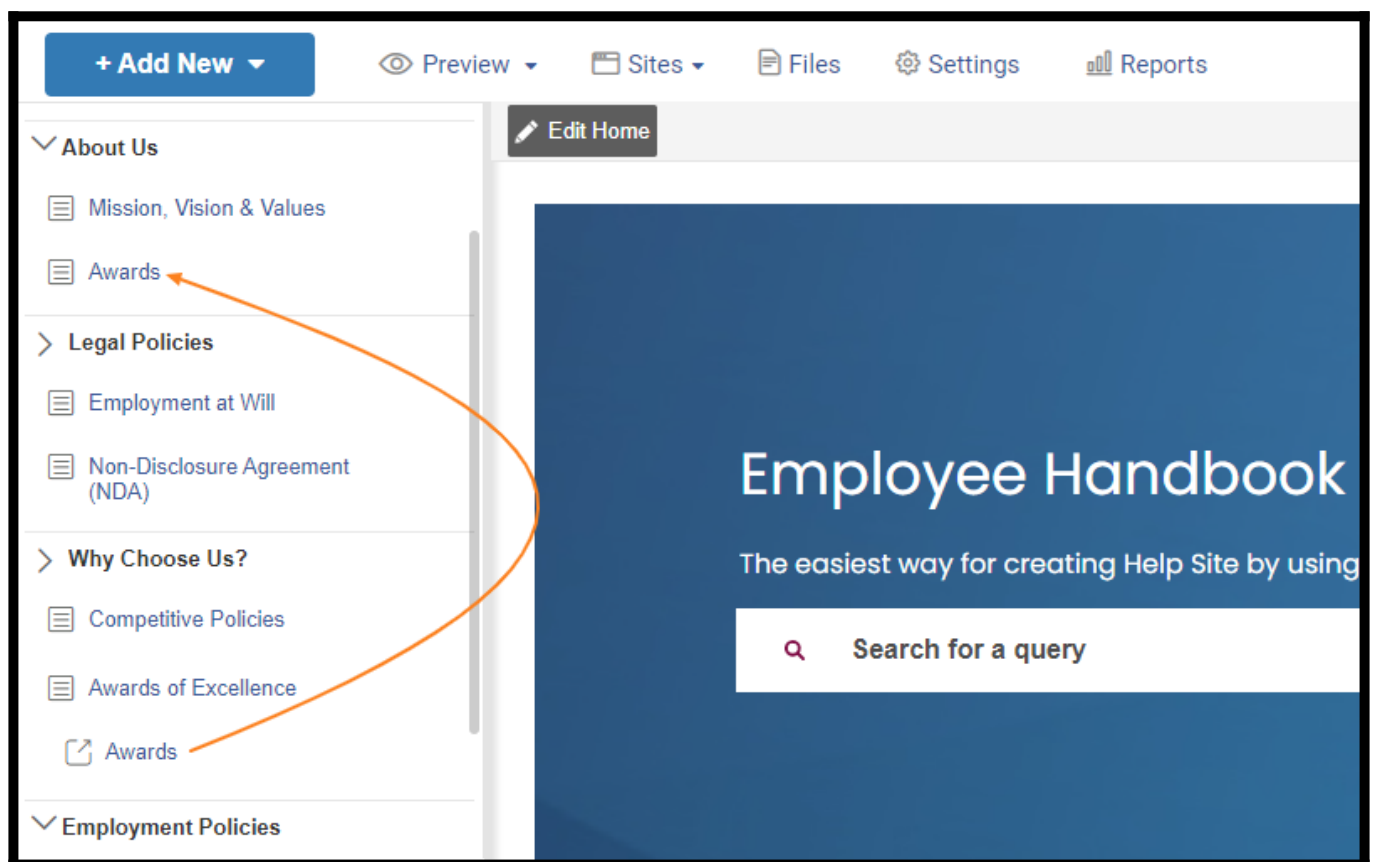
- [How to Add, Edit, and Delete a Page](#)
- [How to Add a Sync Page](#)
- [How to Create a Tooltip](#)

# How to Add a Sync Page

ProProfs Knowledge Base enables you to make one page appear at multiple locations through the **Sync Page** setting. If you have an article relevant to various folders, you can use **Sync Page** to add it to every folder.

Sync Page facilitates central editing, so you don't have to worry about updating the page in every folder. You can edit the page in one folder, and the changes will automatically appear across other locations.

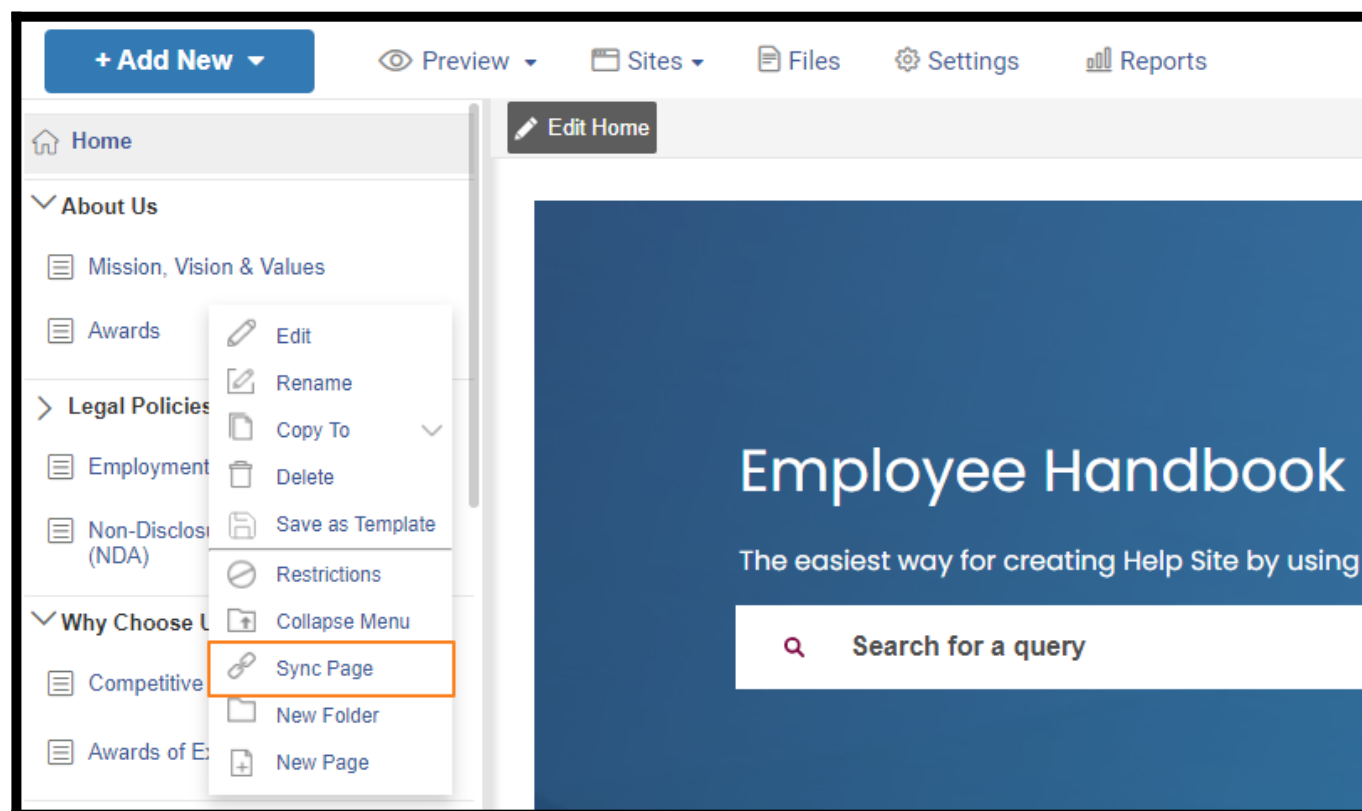
In the below example, we have synced the **Awards Page** in one folder with the **Awards of Excellence Page** in another folder.



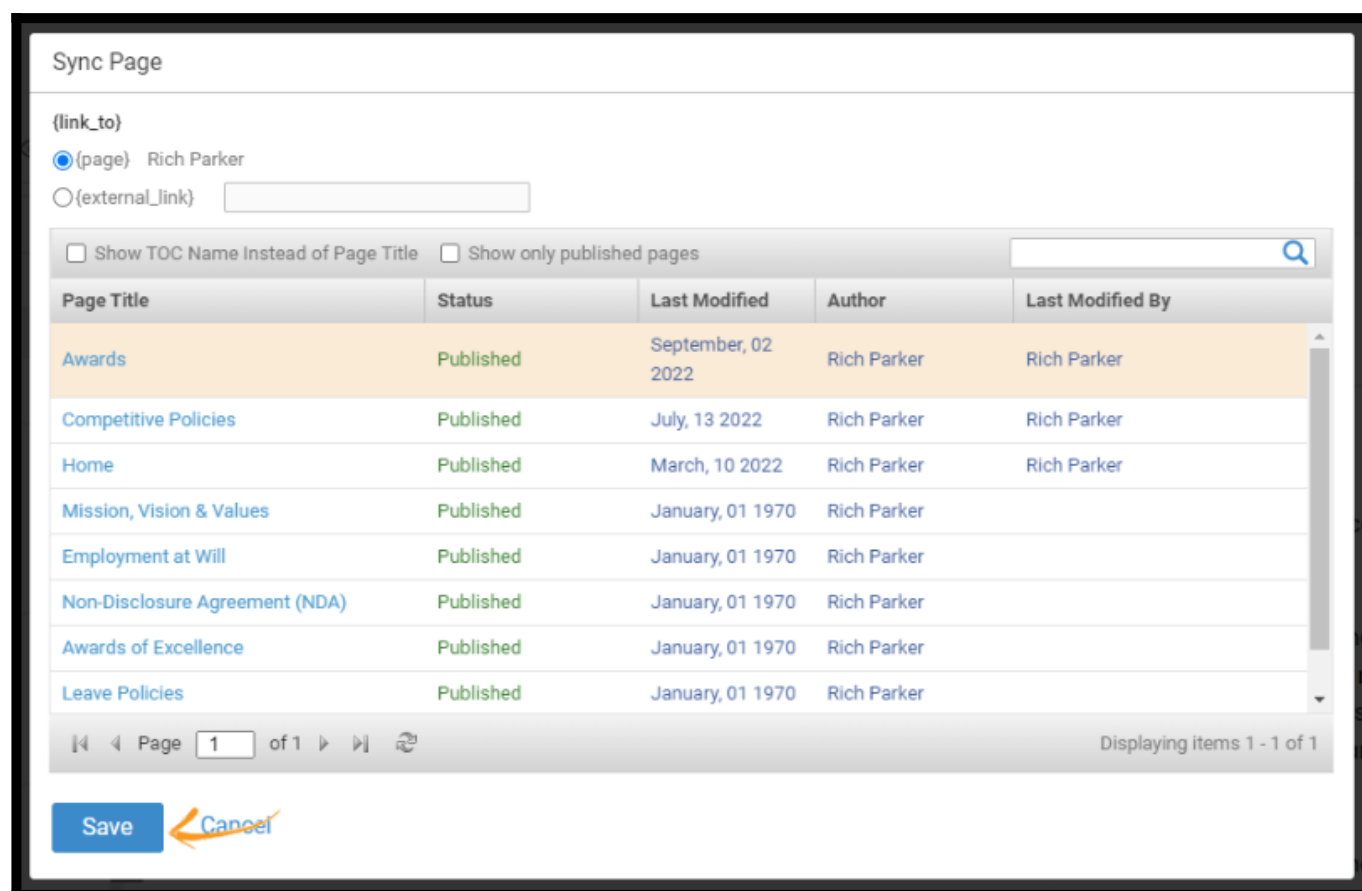
## How to Add a Sync Page

**Step 1:** In your ProProfs Knowledge Base account,

- Hover over to the page name, click the **gear** icon, or right-click.
- Click **Sync Page**.



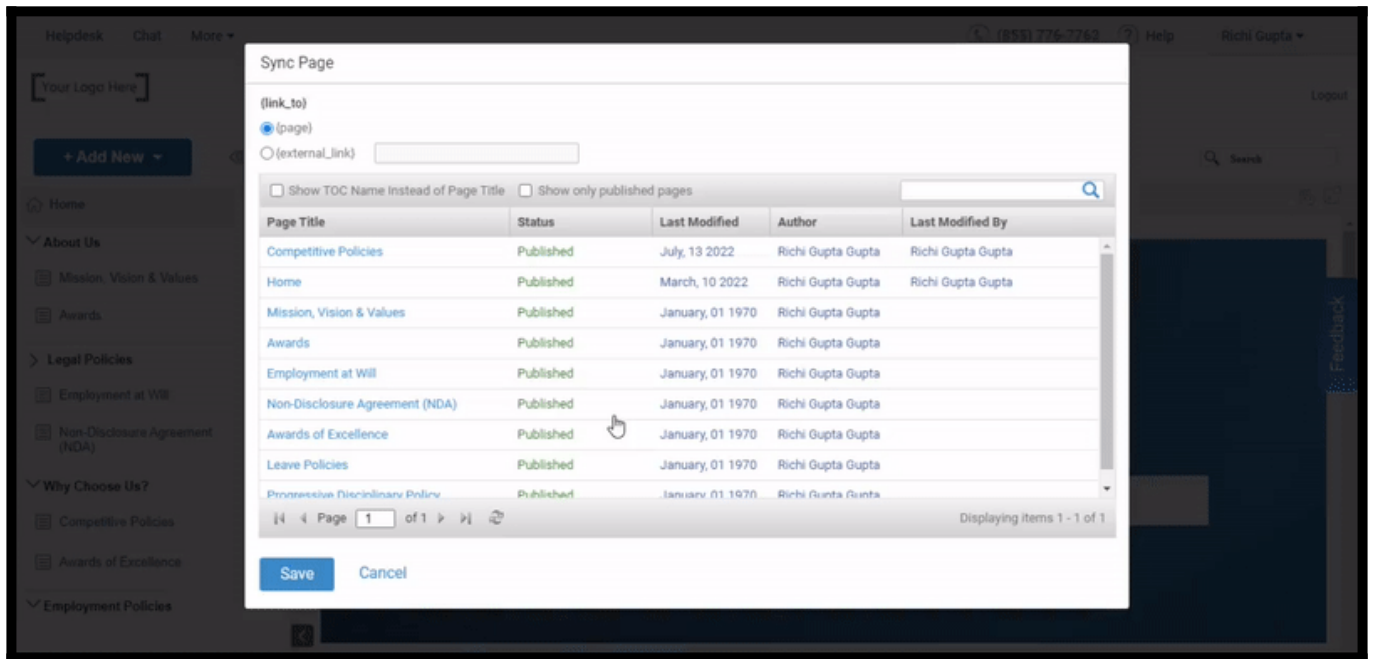
**Step 2:** A window listing all published pages will appear. Select the page you want to create a synced copy of, then click **Save**.



**Step 3:** You can now see a new page link in the TOC with the same title as the chosen page. To

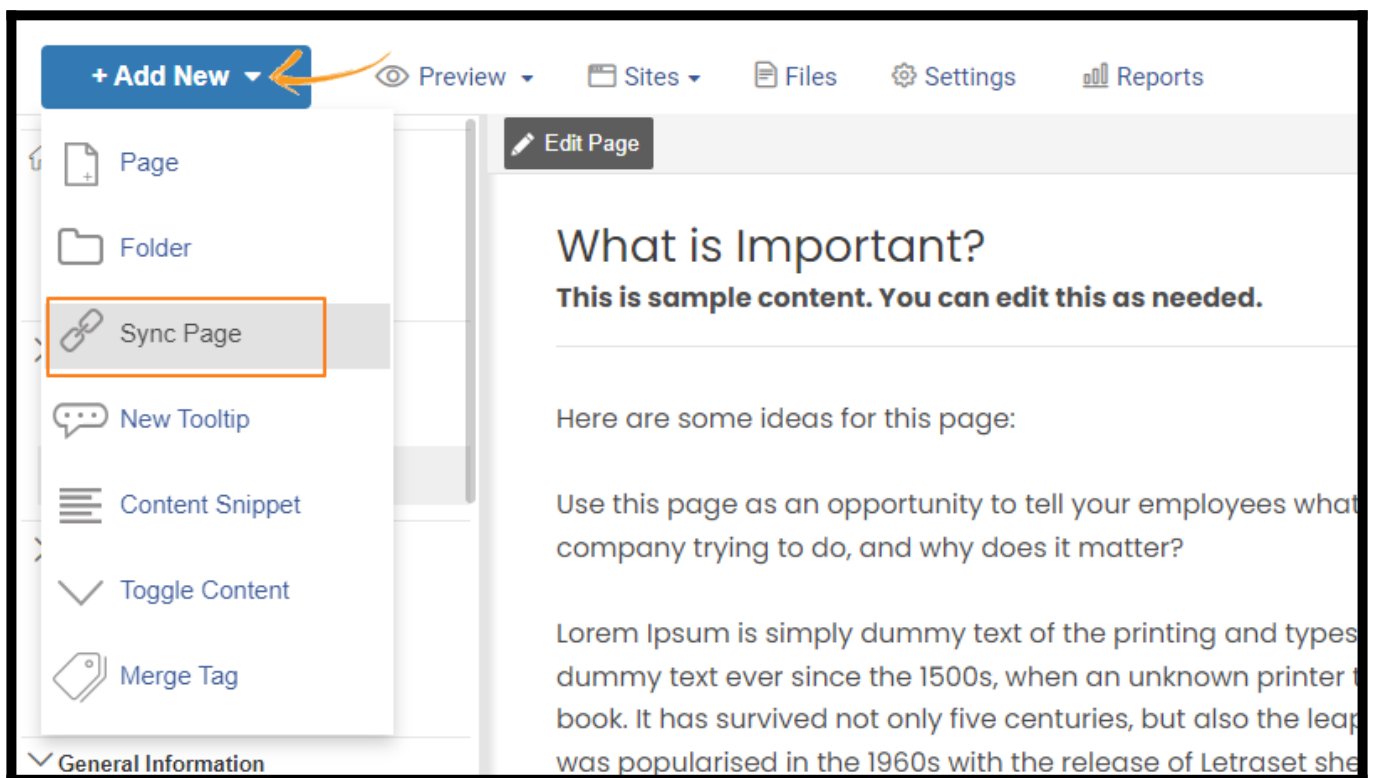


complete the sync, **Click and Drag** the synced page, in this case, **"Awards,"** and **drop** it on the **desired page title** in the TOC; here, Awards of Excellence.



Another way you can do that is by simply **clicking Add New** and selecting **Sync Page**. A new **window** will appear, listing all the published pages.

**Select the page** you wish to create a synced copy of, then click **Save**.



*That is all about adding a sync page.*

### Related Articles:

- [How to Add, Copy, and Delete a Folder](#)
- [How to Create a Tooltip](#)
- [How to Create Content Snippets](#)

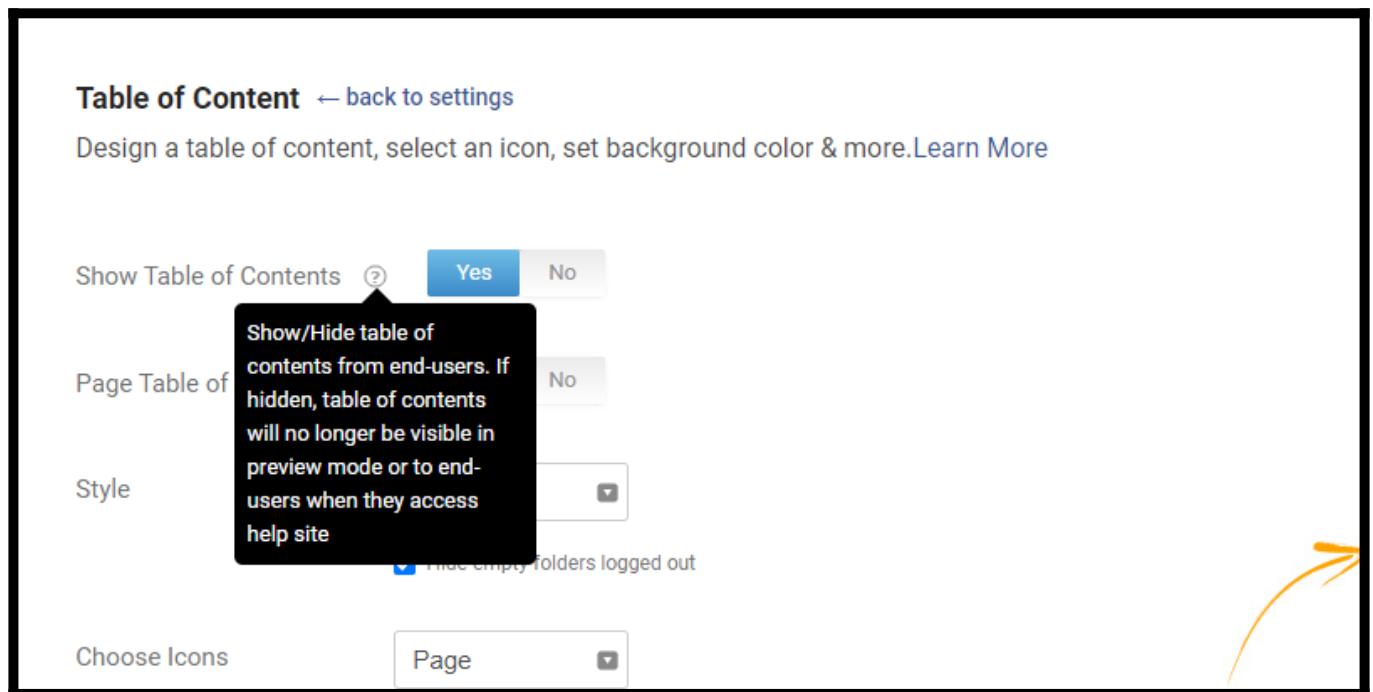
# How to Create a Tooltip

ProProfs Knowledge Base lets you **add tooltips** to briefly **explain complex** terms and **add value** to the overall user experience. A tooltip is a **short informational text** that appears when the mouse pointer hovers over an icon (such as a question mark), image, hyperlink, or any other element in the graphical user interface.

## Benefits of Tooltips:

- Help users understand the topic better
- Attract users' attention to new features

Below is a preview of a tooltip:

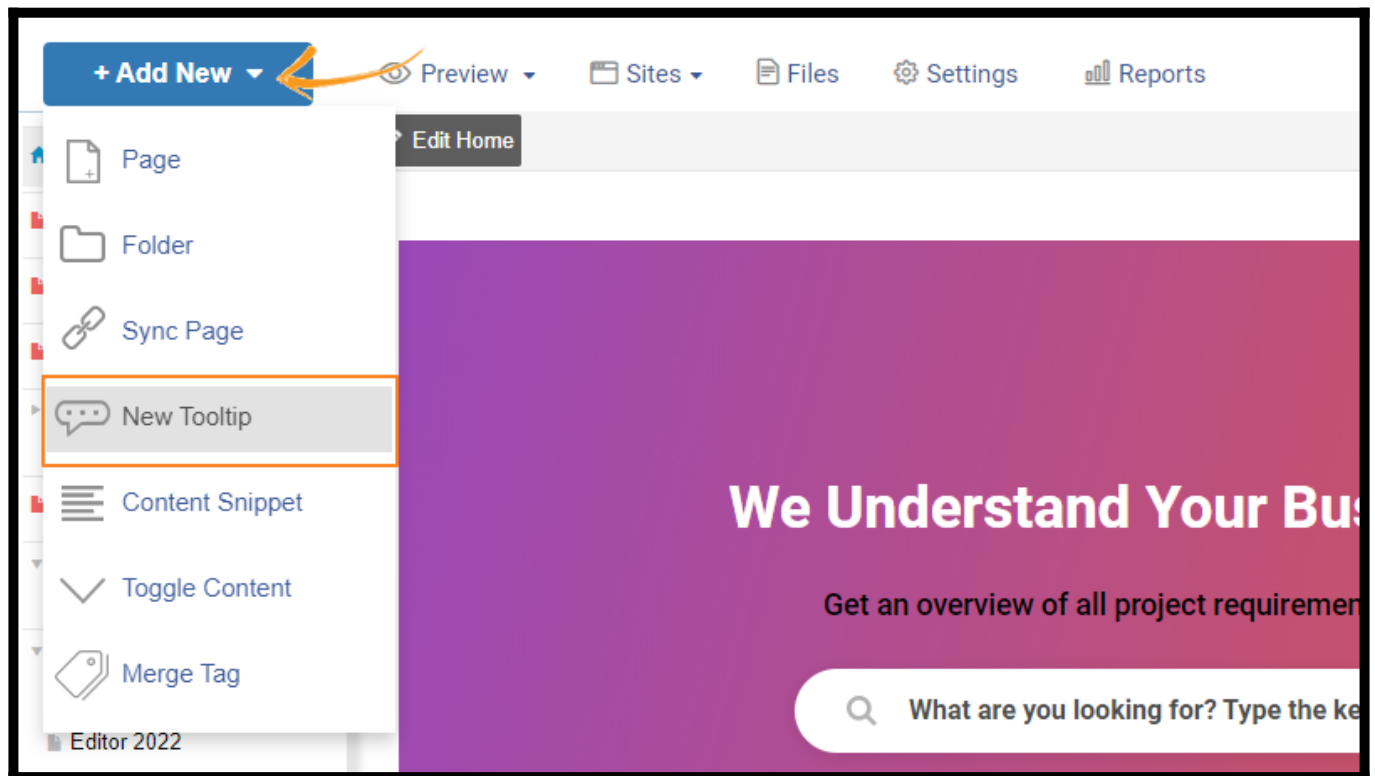


In this article, you will learn:

1. [How to Add a Tooltip to a Website](#)
2. [How to Add Multiple Tooltips](#)
3. [How to Add a Tooltip to a ProProfs Page](#)
4. [How to Edit a Tooltip](#)

## How to Add a Tooltip to a Website

**Step 1:** On your ProProfs Knowledge Base dashboard, go to **+Add New > New Tooltip**.



**Step 2:** Enter the required details.

**Tooltip**

\* Name:

Description:

Custom ID:

\* Width/Height: Width  Height: (auto)

Offset: X  Y  ☒ Auto Close

Styles ▾ Normal ▾ Font ▾ Size ▾

**A** *A* **B** *I* U ~~S~~

Insert ▾

This is the sample text for the tooltip.

body p

Preview ☐ Use https (secure) ☐ Use Custom ID

This is the sample text for the tooltip.

Click save to generate your code

Save Cancel

- **Name:** Enter the tooltip name used to recognize the tooltip. It is hidden from the users.
- **Description:** This is used to describe the tooltip content. It is hidden from the users.
- **Custom ID:** This is automatically generated. But you can enter your custom ID as well. Please note that it shouldn't contain any numeric characters.
- **Width/Height:** Adjust the width of the box where the tooltip text appears. The height is adjusted automatically.
- **Offset:** X and Y offsets indicate how much left or right the tooltip box appears to the cursor's position.
- **Auto-Close:** Enable this option if you want the tooltip to close automatically by moving the

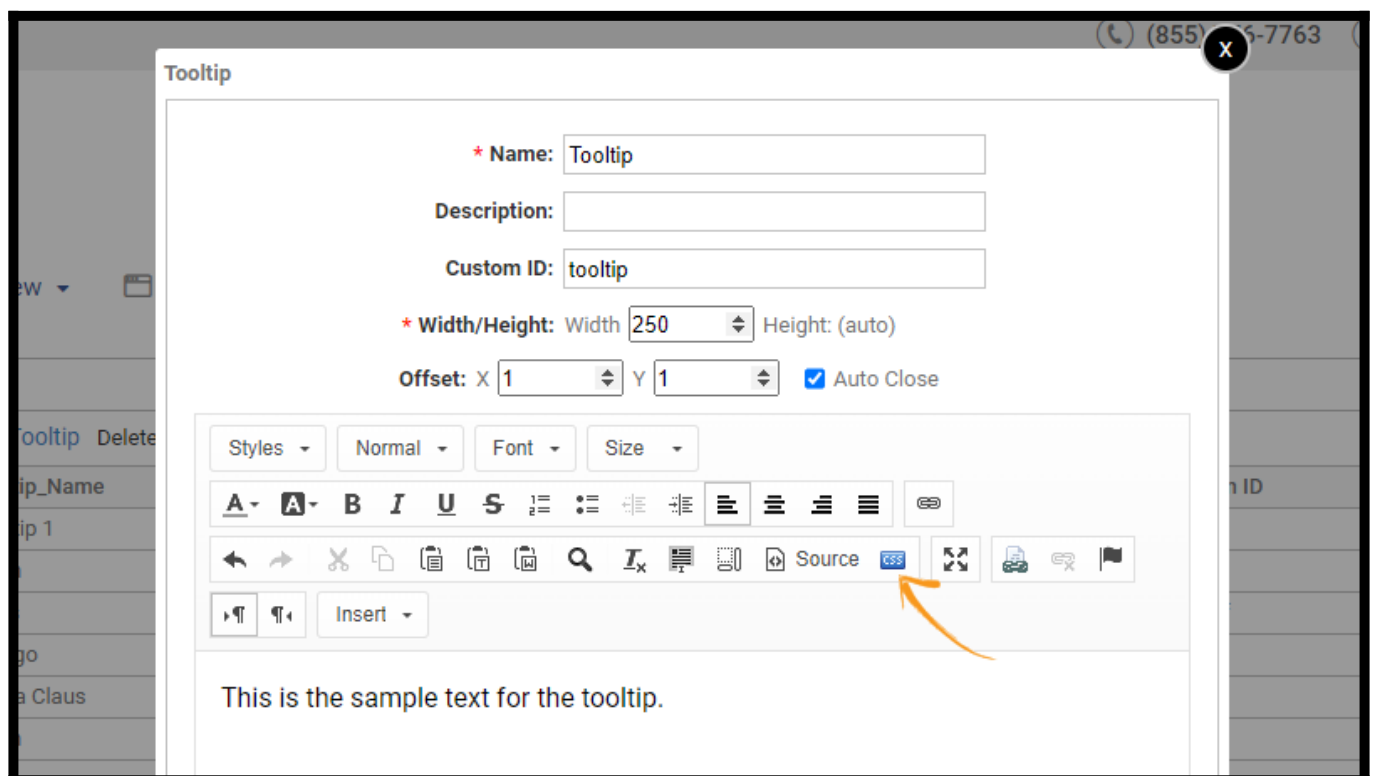
cursor away from the link.

- Enter the **tooltip text** in the large text box provided.
- **Preview:** This is to preview the tooltip.
- **Use HTTPS (secure):** Check the box if your website or web application runs on //https (SSL).
- **Use Custom ID:** Check the box if you've provided your Custom ID.

## Tooltip style and CSS

**CSS (Cascading Style Sheets)** stores a webpage's style presentation information (such as colors, fonts, layout, etc.). ProProfs allows you to control the CSS for the tooltips you create independently. It will enable you to have a distinct style for your tooltips.

**Step 2.1:** To edit the CSS of the tooltip, click on the **CSS** button.

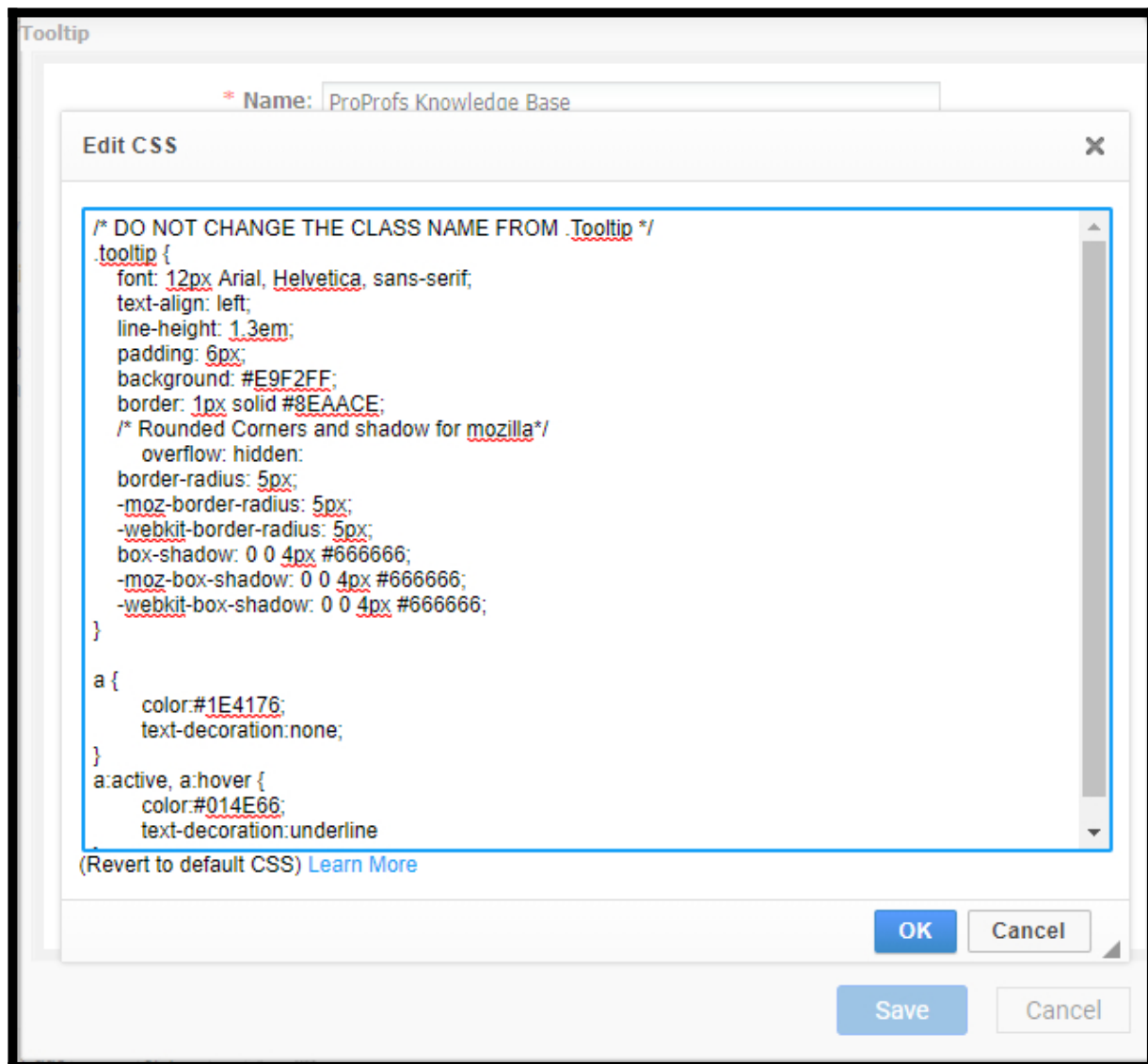


**Step 2.2:** You can change the box color, fonts, shadows, and other attributes of the tooltip. When you're done, click **OK** and **save**.

Here are some elements you can change based on your preferences:

## Sample Code

```
font: 12px Arial, Helvetica, sans-serif;           // This is the font family.
background: #FFF4E3                                // This is the
color of the tooltip. The default is light blue.
border: 1px solid #FF9900                           // This is the
border color around the tooltip.
```



**Step 3: Copy the code snippet** and paste it on your website where you want the tooltip to appear. If you have a developer working on your website, give them the code and tell them where you want to place the tooltip. They'll do the rest. **Save** when you're done.





```
<a href="#" title="tip:http://site.helpdocsonline.com/ID246">Lorum Ispum</a>
```

**Copy** the highlighted **code** and move the same into the **<head>** tag. Place the rest of the code in the **<body>** tag.

### Example

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="http://www.w3.org/1999/xhtml">
<head>
<title>Untitled Document</title>
<script src="http://www.helpdocsonline.com/jquery-1.7.2.min.js"></script>
<script src="http://www.helpdocsonline.com/v2/tooltips.js"></script>
</head>
<body>
<!--tooltip 1-->
<a href="#" title="tip:http://site.helpdocsonline.com/ID246">Lorum Ispum</a>
<!--tooltip 2-->
<a href="#" title="tip:http://site.helpdocsonline.com/ID185">business phone</a>
</body>
</html>
```

## How to Add a Tooltip to a ProProfs Page

**Step 1:** Go to **+Add New > New Tooltip** on the dashboard. Enter details.

**Step 2:** To add a tooltip to a ProProfs page, take the Custom ID (**ID\*\*\*\*\***) of the tooltip from the code snippet.

**NOTE:** You only require the numerical part from "ID\*\*\*\*\*," as shown in the screenshot below.

**Step 3:** Put that numerical value in the following code:

```
<a class="hq-tip" href="#id=183">link name</a>
```

To do that, replace **"183"** in the "id=183" with the new numerical value.

Furthermore, replace the text **"link name"** in the code with the tooltip name you created initially.

It ensures that the tooltip is shown with the correct name on the intended ProProfs page.

Now, taking the example of the screenshot in Step 2, the updated code should read as

Sample Code

```
<a class="hq-tip" href="id=88490">Knowledge Base</a>
```

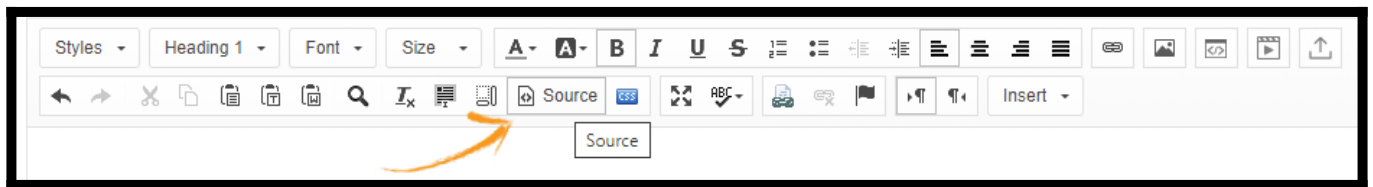
**Alternatively**, if you've provided a specific Custom ID, you can use that instead of the auto-generated numerical ID.

**Step 4:** Open the ProProfs page for editing where you want the tooltip to appear.

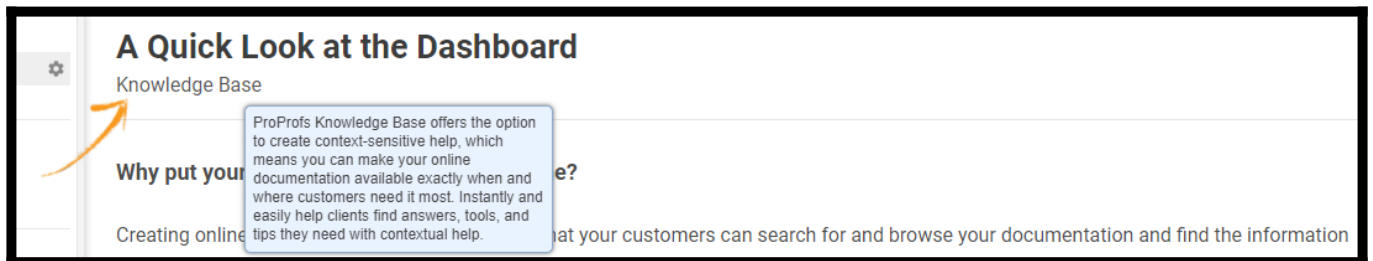


**Step 5:** Go to the **Source** to access the page's code. Copy the updated code from **Step 3** and paste it into the source code where you want the tooltip to appear.

Once done, click **save**.



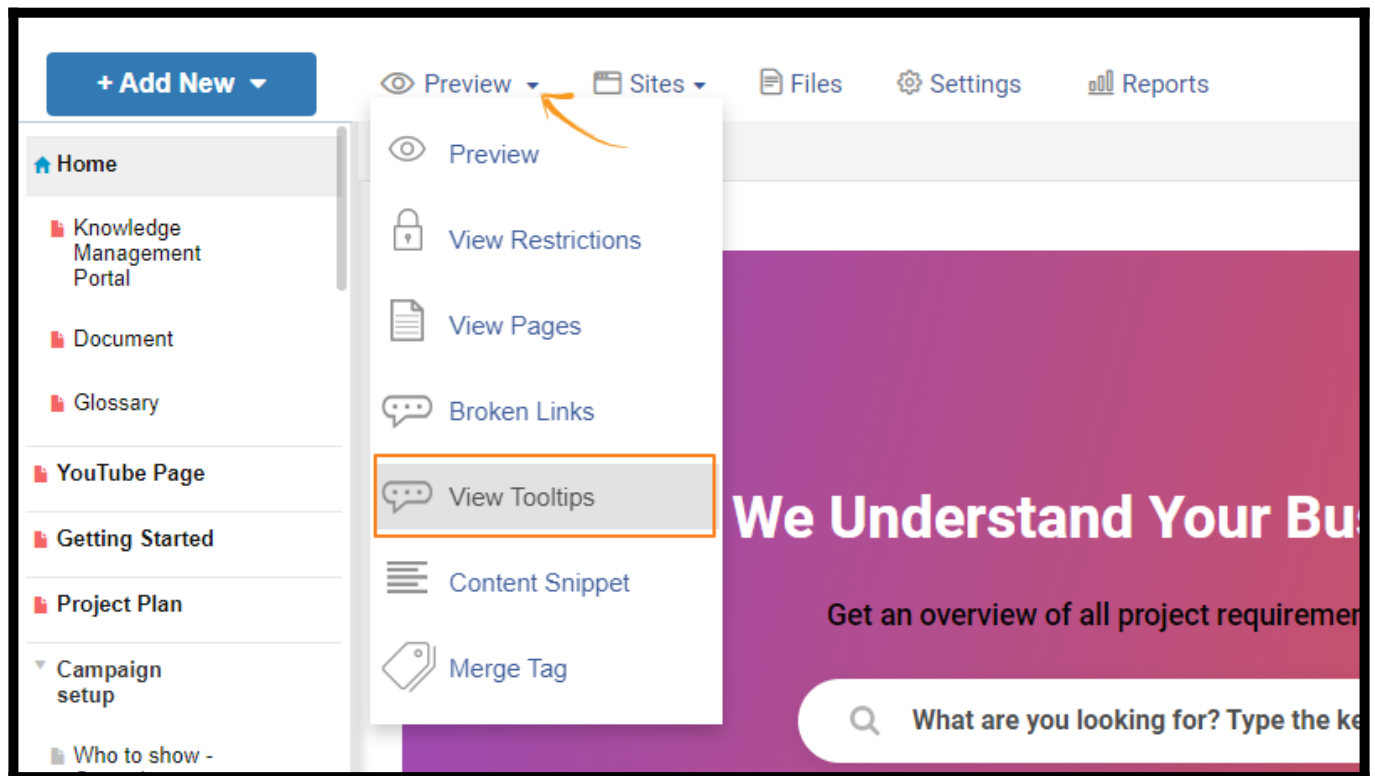
Here's what the tooltip looks like after applying it on a ProProfs page.



## How to Edit a Tooltip

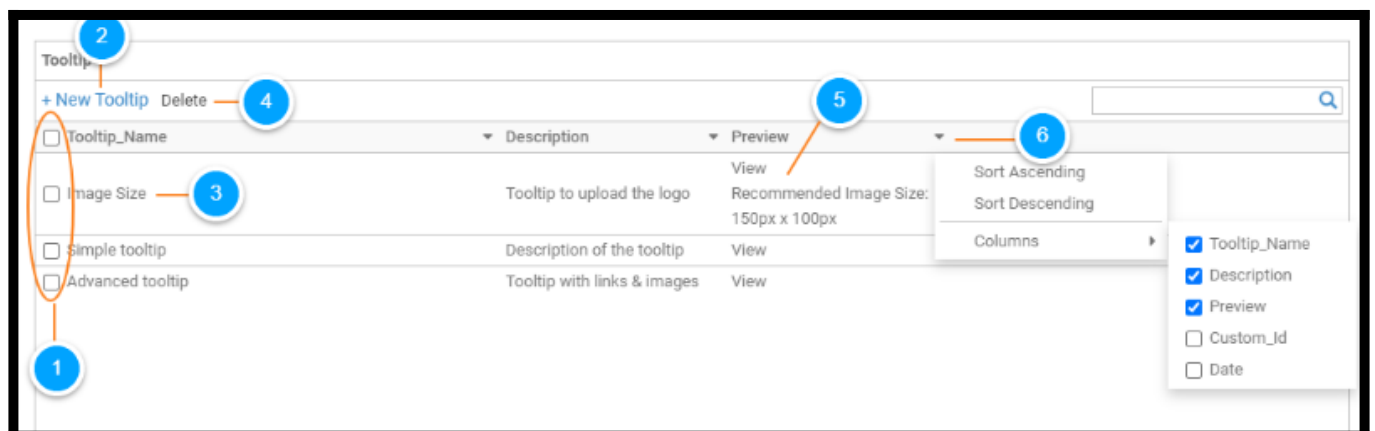
You can easily view and edit the tooltips you've created.

**Step 1:** Go to **Preview > View Tooltips**.



**Step 2:** Under **View Tooltips**, you can:

1. View all the tooltips you've created as a list.
2. Create a new tooltip.
3. Click on the title to open it for editing.
4. Select the checkbox and click Delete to remove a tooltip.
5. Preview tooltip content by hovering the cursor over **View**.
6. Click the dropdown arrow to sort a given tooltip attribute in your preferred order. You can also select/deselect columns from appearing.



*That is all about tooltips in the ProProfs Knowledge Base.*

### Related Articles:

- [How to Add a Sync Page](#)
- [How to Create Content Snippets](#)
- [How to Add Toggle Content](#)

# How to Add Content Snippets

ProProfs Knowledge Base lets you place **content snippets** (small pieces of customizable content) anywhere on your help site pages. The main advantage of using content snippets is that you can place them at different locations on your website without repeatedly writing the exact text.

## Benefits of using a Content Snippet:

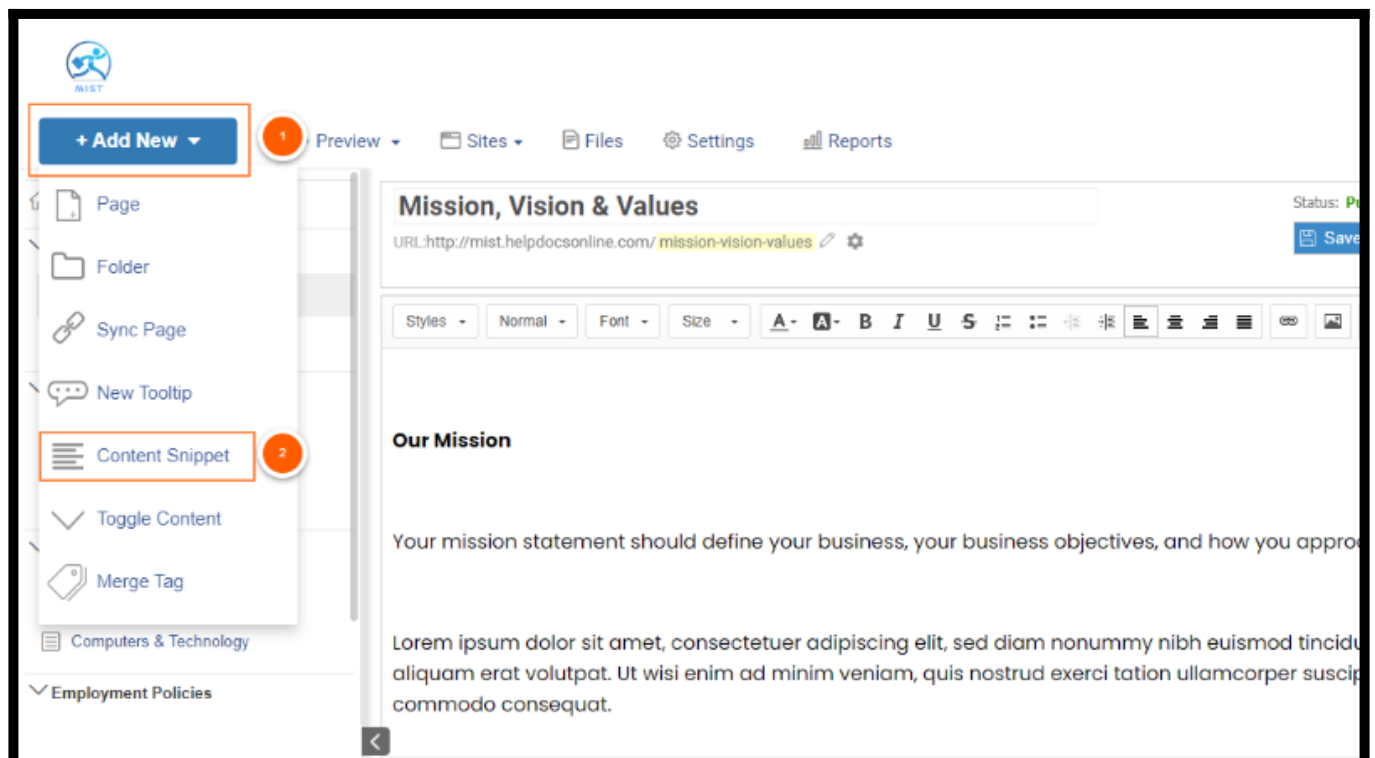
- Prevents you from repeatedly writing the same information.
- Saves time while placing the exact text at different locations on your website.
- Edit the snippet once, and the changes will reflect across all instances where it is placed.
- Maintain consistency across the help site.

## In this article, you'll learn:

- [How to Create a Content Snippet](#)
- [How to Insert a Content Snippet on a Webpage](#)
- [How to Preview, Edit, and Delete a Content Snippet](#)

# How to Create a Content Snippet

**Step 1:** In your ProProfs Knowledge Base editor, click **+Add New > Content Snippet**.



**Step 2:** Enter the required fields and click **Save**.

**Content Snippet**

\* **Title:**

**Description:**

☒ Available for all sites

**Customization Options**

**GDPR Compliance**

The EU General Data Protection Regulation has fundamentally transformed how businesses handle personal data. Any company that does not follow these new norms face severe fines, potentially up to €20 million or 4% of annual global revenue, depending on the severity and circumstances of the violation. In other words, GDPR compliance is not optional.

**Save** **Cancel**

**Note:** Select the option: "Available for all sites" if you want to make this Content Snippet available for all your ProProfs sites. Else, keep this unchecked if you want it to be available for a specific page only.

All the Content Snippets appear in a **list** like this:

**Content Snippet**

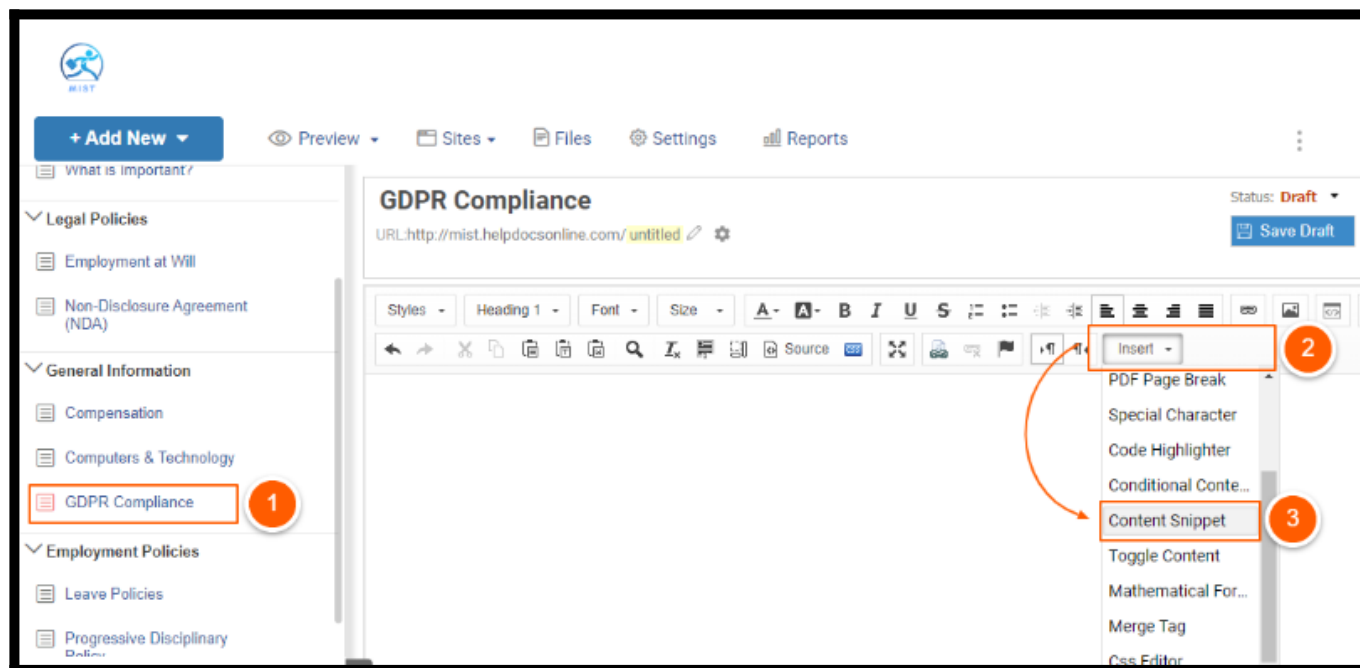
[+ New Content](#) [Delete](#)

<input type="checkbox"/> Name	Description	Date	Global
<input type="checkbox"/> GDPRCompliance	General Description	July, 15 2022	0
<input type="checkbox"/> Titleofcontentsnippet	This is the conte		1

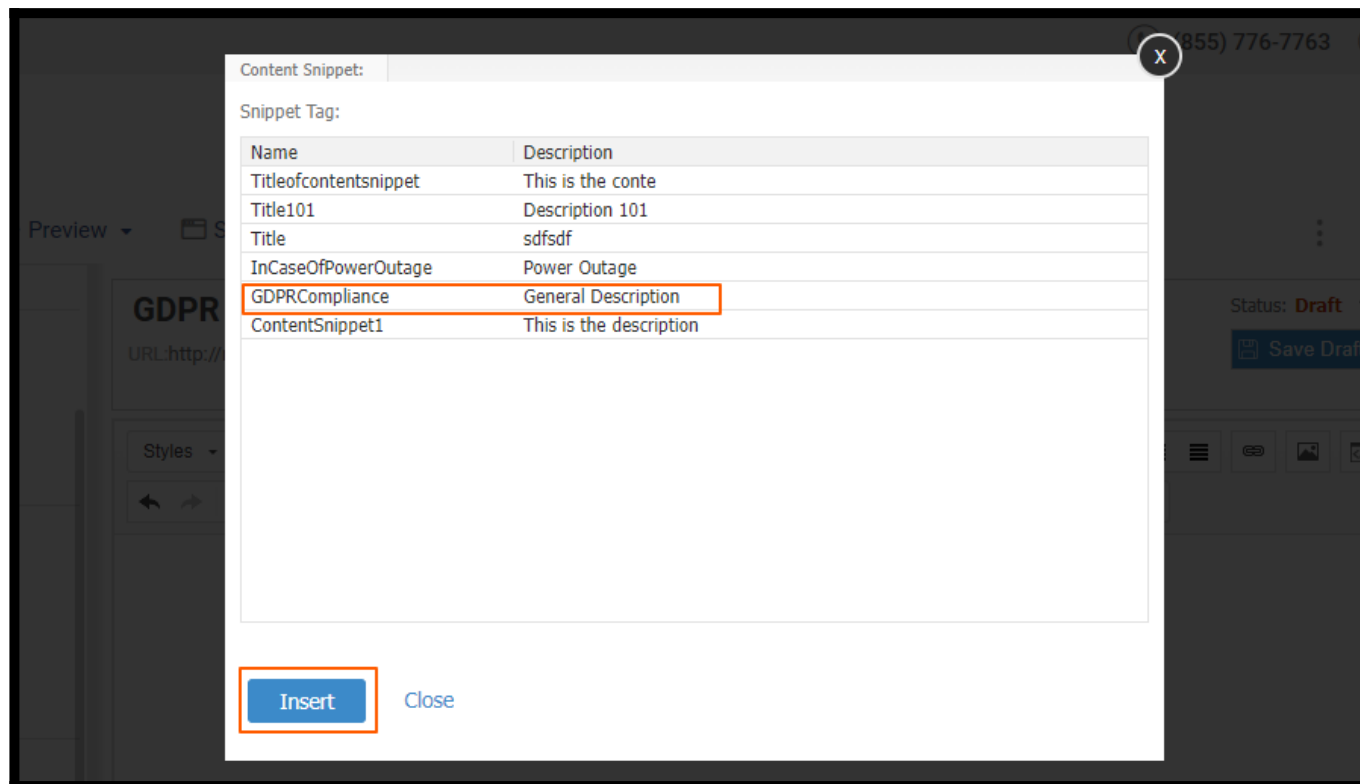
# How to Insert a Content Snippet on a Webpage

**Step 1:** Open the page in editor mode.

**Step 2:** In the toolbar, click **Insert > Content Snippet**.

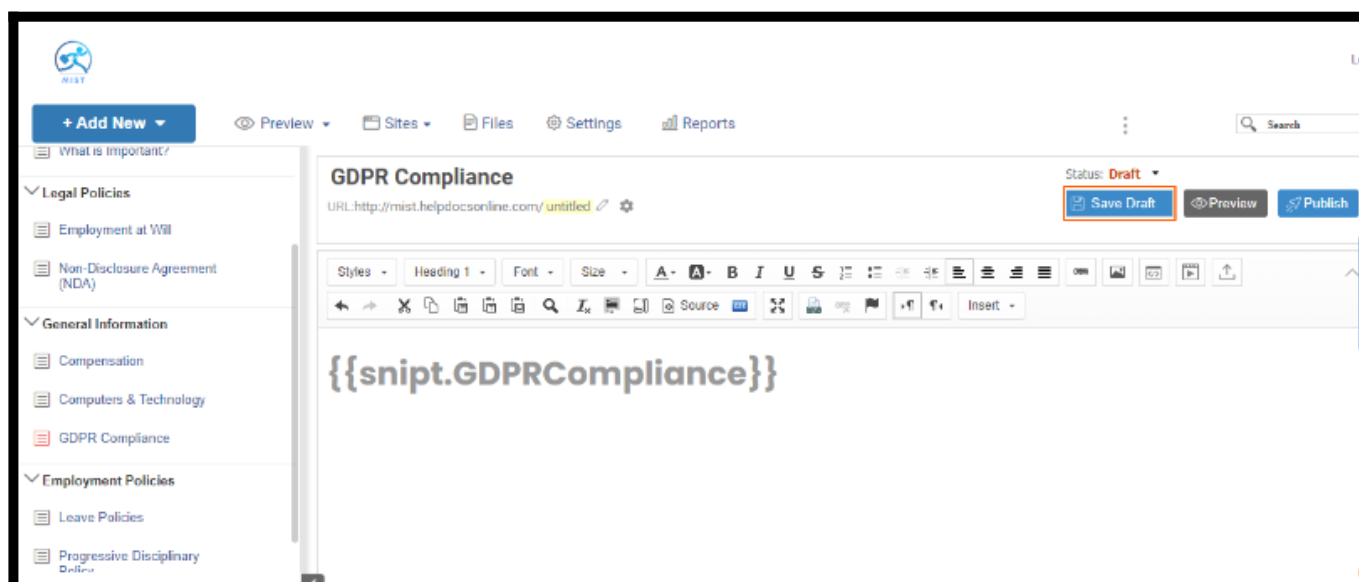


**Step 3:** Select the Snippet tag and click **Insert**.

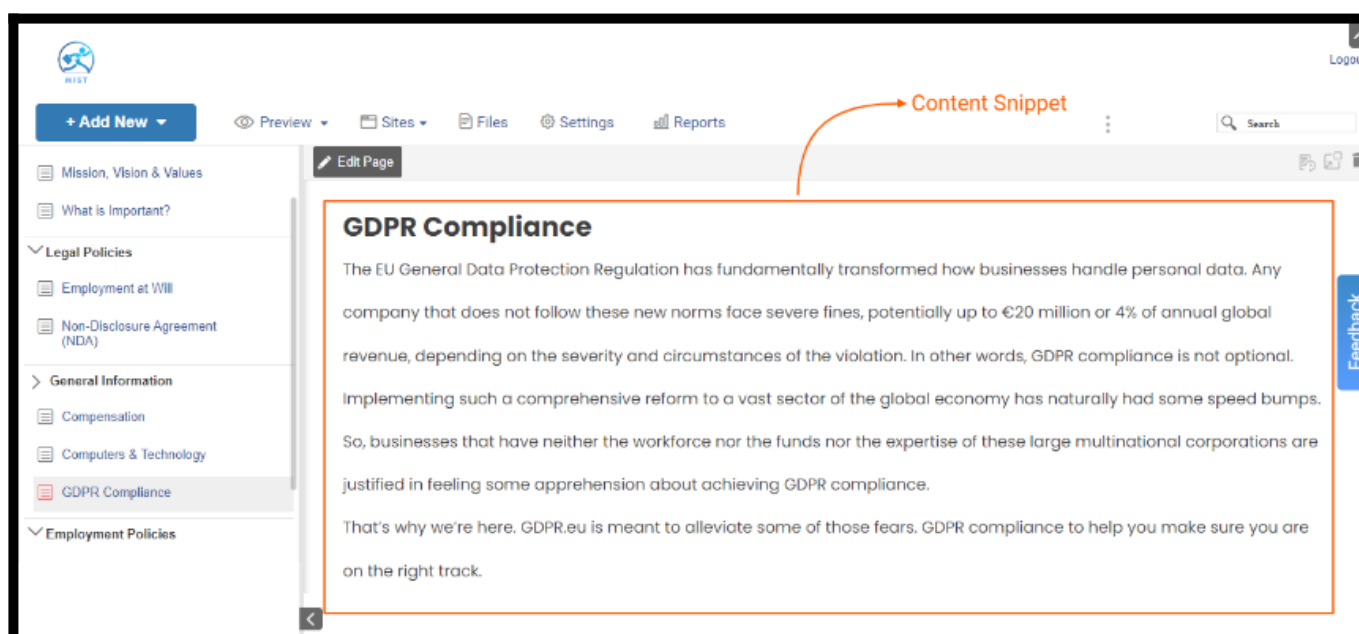


**Step 4:** Click **Save Draft**.



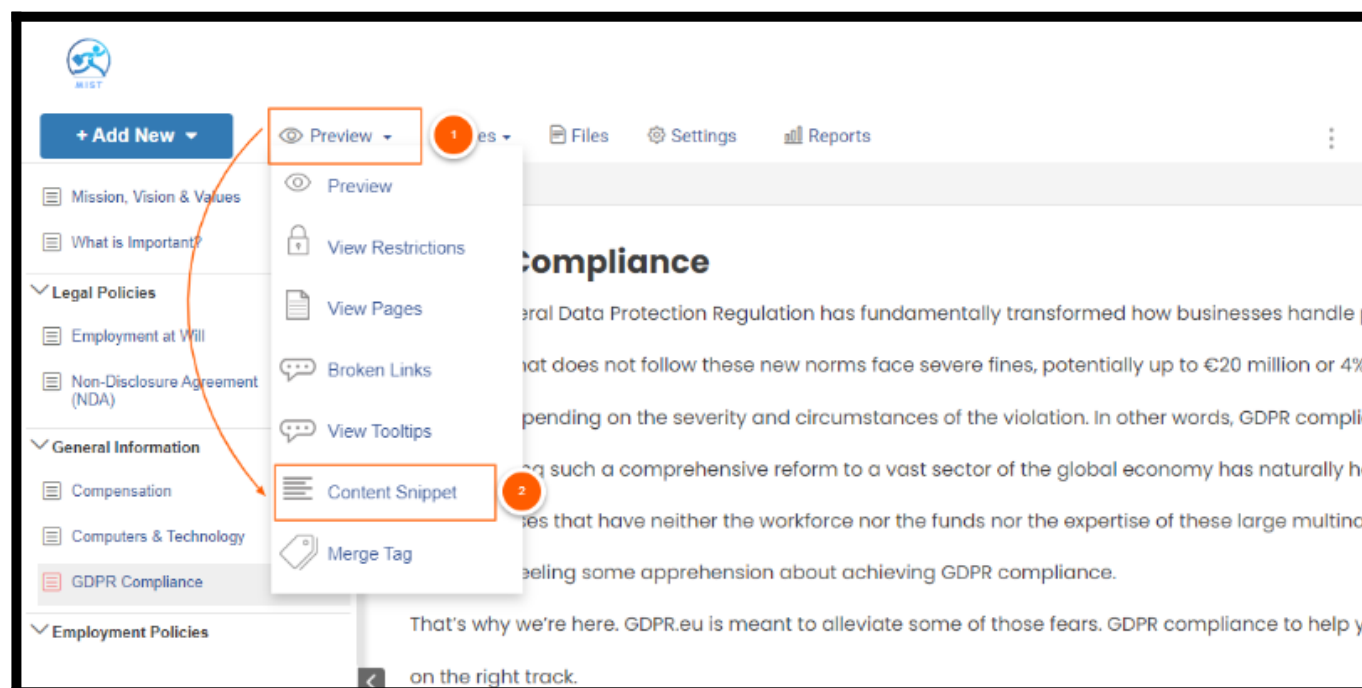


Click **Preview** to see how the content snippet appears on your page.



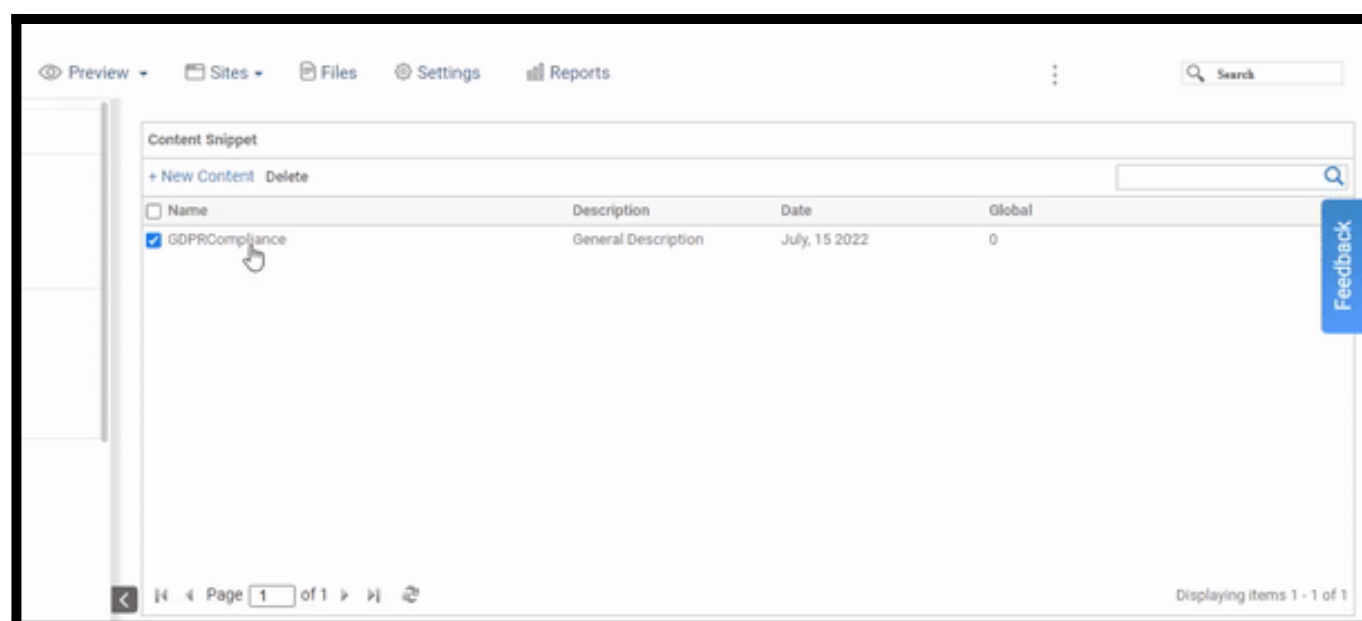
## How to Edit or Delete a Content Snippet

- Click **Preview > Content Snippet**.



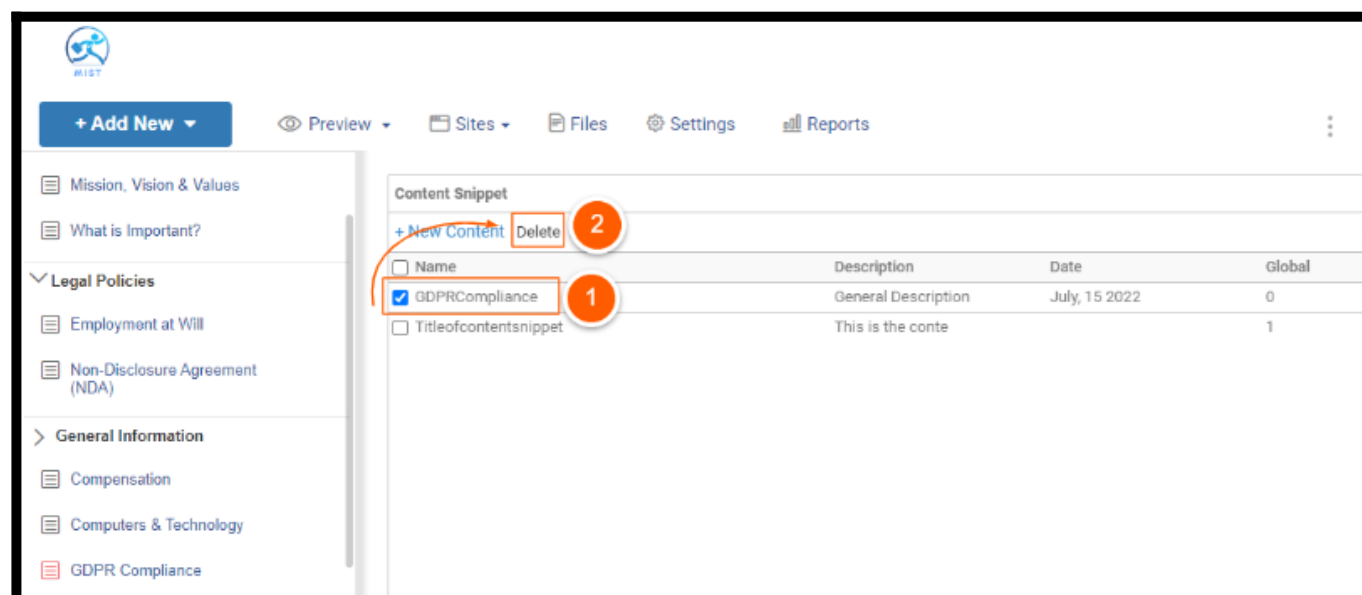
To edit a content snippet:

- **Select** the content snippet.
- **Edit** the **content** and click **Save**.



To delete a content snippet:

- Select the content snippet and click '**Delete**.'



You have successfully removed the content snippet from the list.

Alternatively, you can use **Merge Tags** to create dynamic tags once and reuse them across articles.

*That is all about Content Snippets.*

### Related Articles:

- [How to Create a Tooltip](#)
- [How to Add Toggle Content](#)
- [How to Create a Merge Tag](#)

# How to Add Toggle Content

Toggle content (or collapsible section) allows you to expand or collapse a particular section when a user clicks it, making it easy to view, read and navigate.

In the ProProfs Knowledge Base editor, you can add toggle sections containing images, videos, pdf, links, code snippets, etc., for a better user experience. In addition, you can use the same toggle content on help pages of multiple sites, which is convenient while publishing the same content. E.g., the contact information of the parent company can be used as Toggle Content on its multiple product websites.

***Note:** Use unique toggle content on a page. You can not use the same toggle multiple times on the same page.*

## Benefits of Toggle Content:

- It makes content reusable.
- It maintains uniformity in information across multiple sites.
- It opens in the same window and doesn't redirect users to a separate page.

## [Click to See an Example](#)

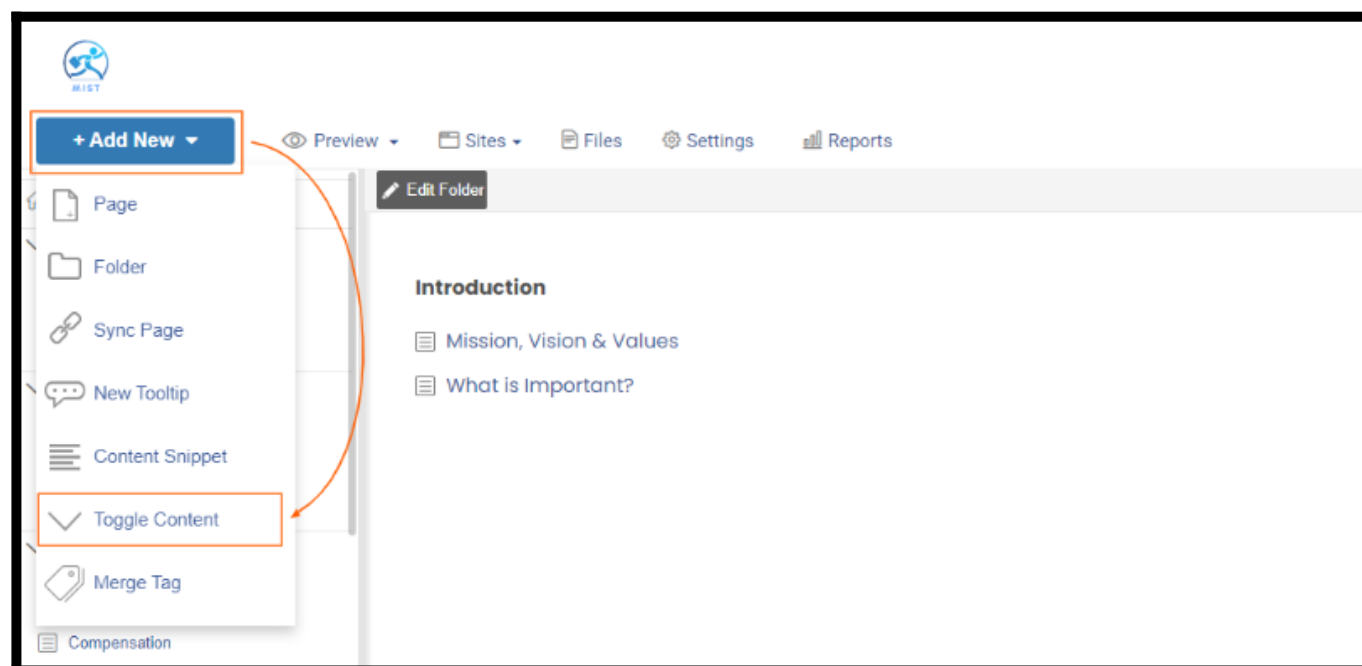
This is a sample. This is how toggle content will appear to the reader. Read on to find out how toggle content is enabled.

## In this article, you'll learn:

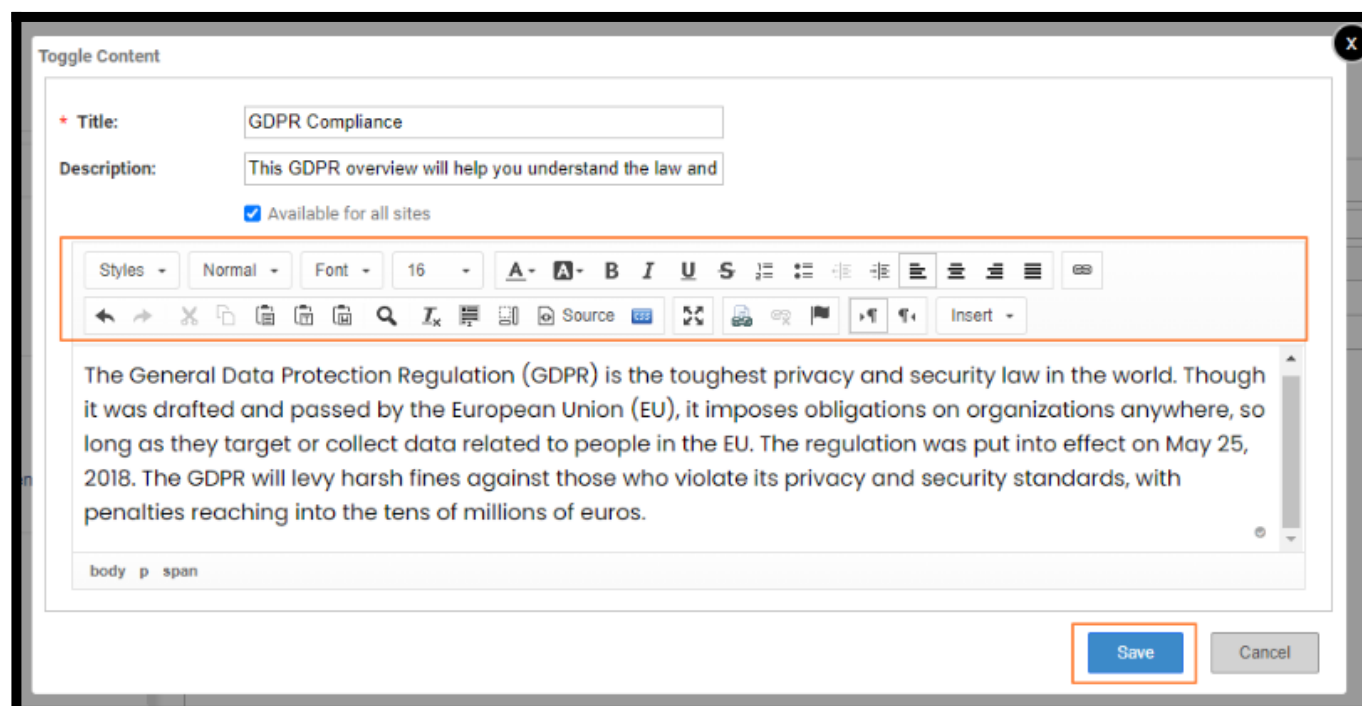
- [How to Create a Toggle Content](#)
- [How to Insert a Toggle Content](#)

# How to Create Toggle Content

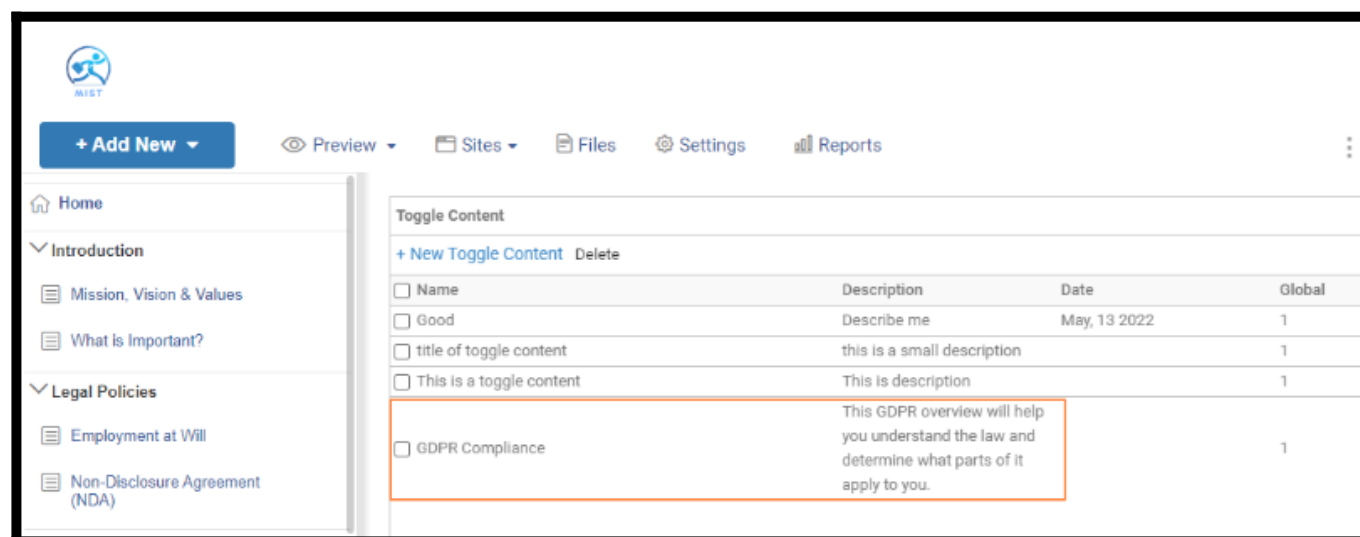
**Step 1:** In your ProProfs Knowledge Base editor, click **+Add New > Toggle Content**.



**Step 2:** Enter the toggle **title**, **description**, and **body** text. Customize the content from the toolbar. Click **Save** when done.

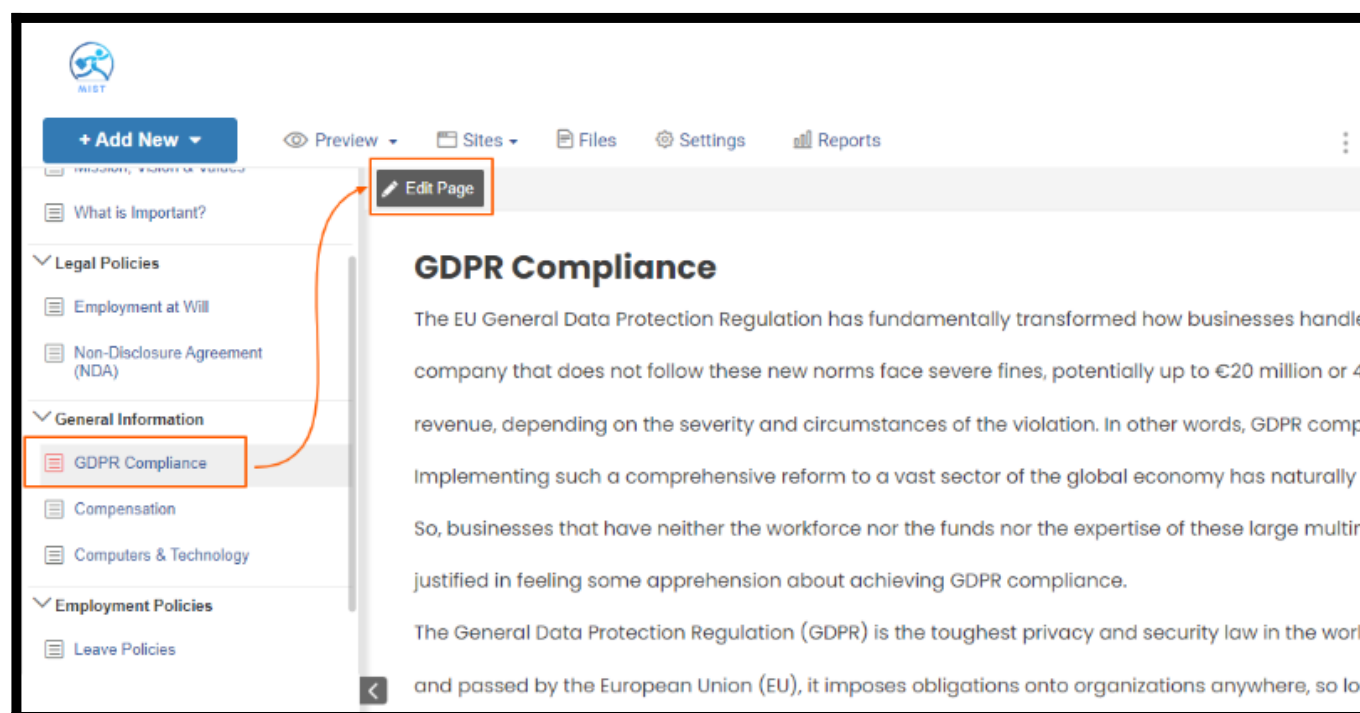


You will find the toggle content in the list from where you can further **edit** or **delete** it.

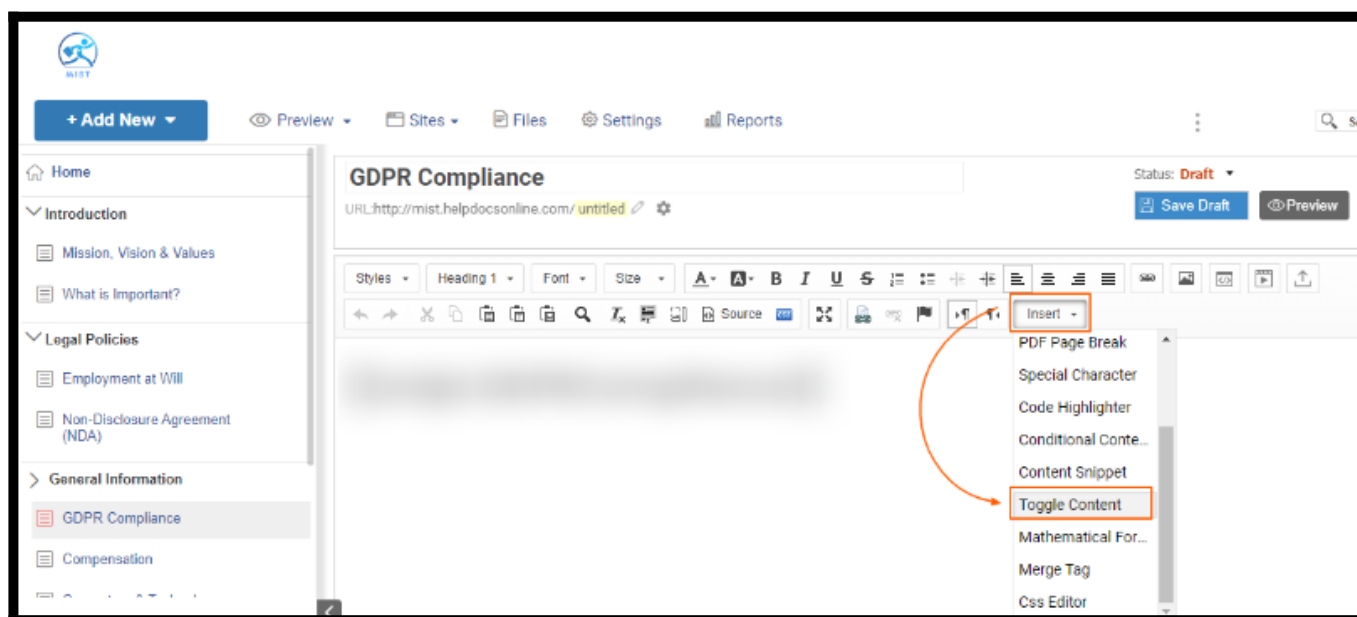


## How to Insert a Toggle Content

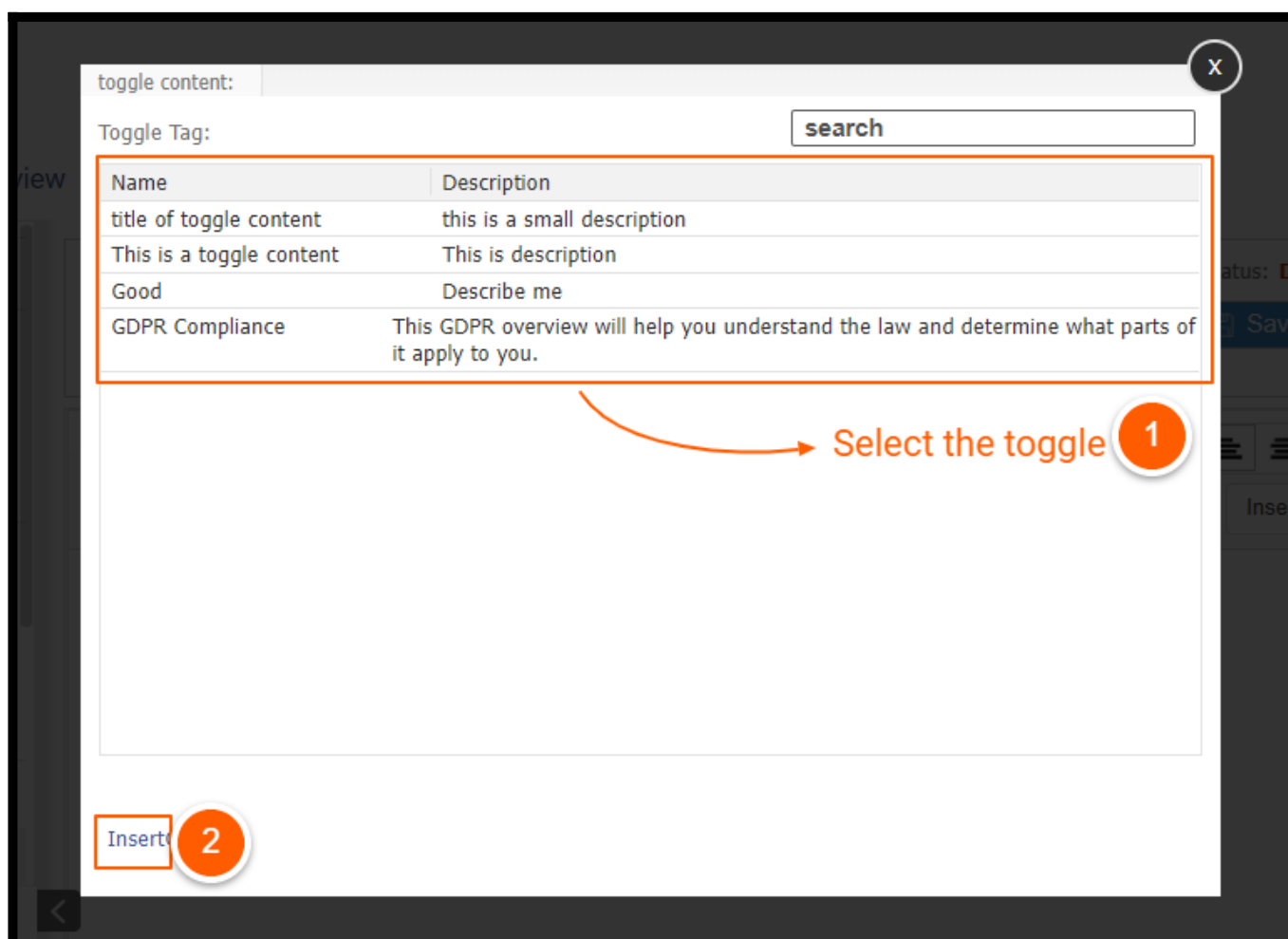
**Step 1:** Open a page for editing where you want the Toggle Content to appear.



**Step 2:** Click Insert >Toggle Content.

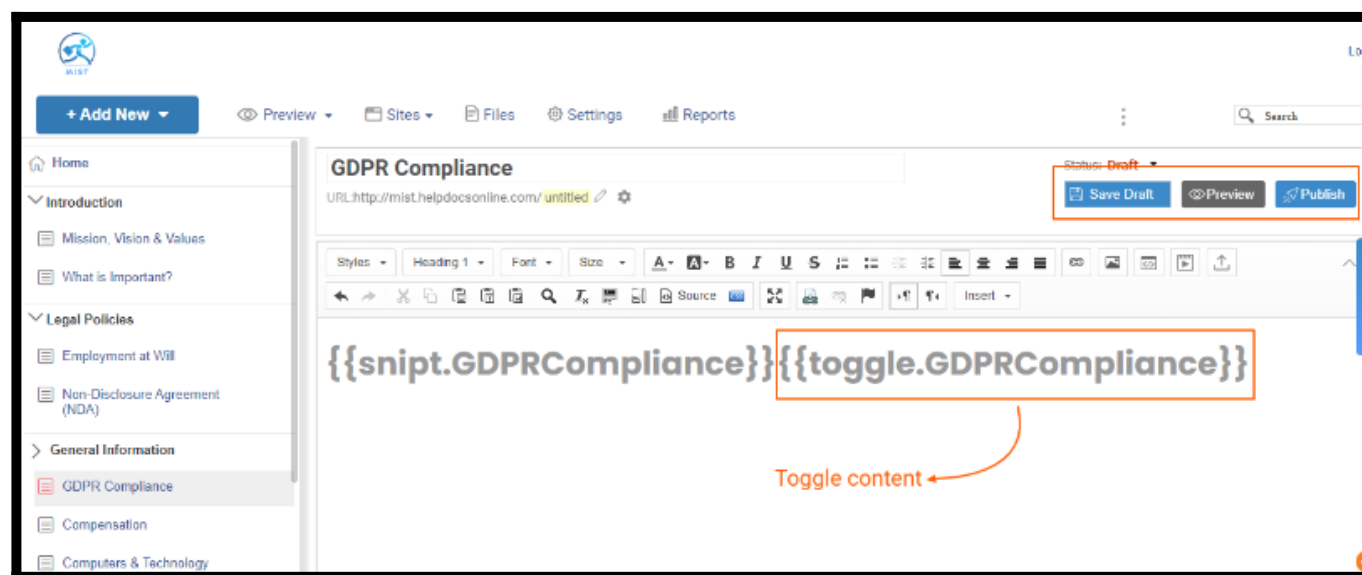


**Step 3:** Select the **Toggle Tag** from the list and click **Insert**.

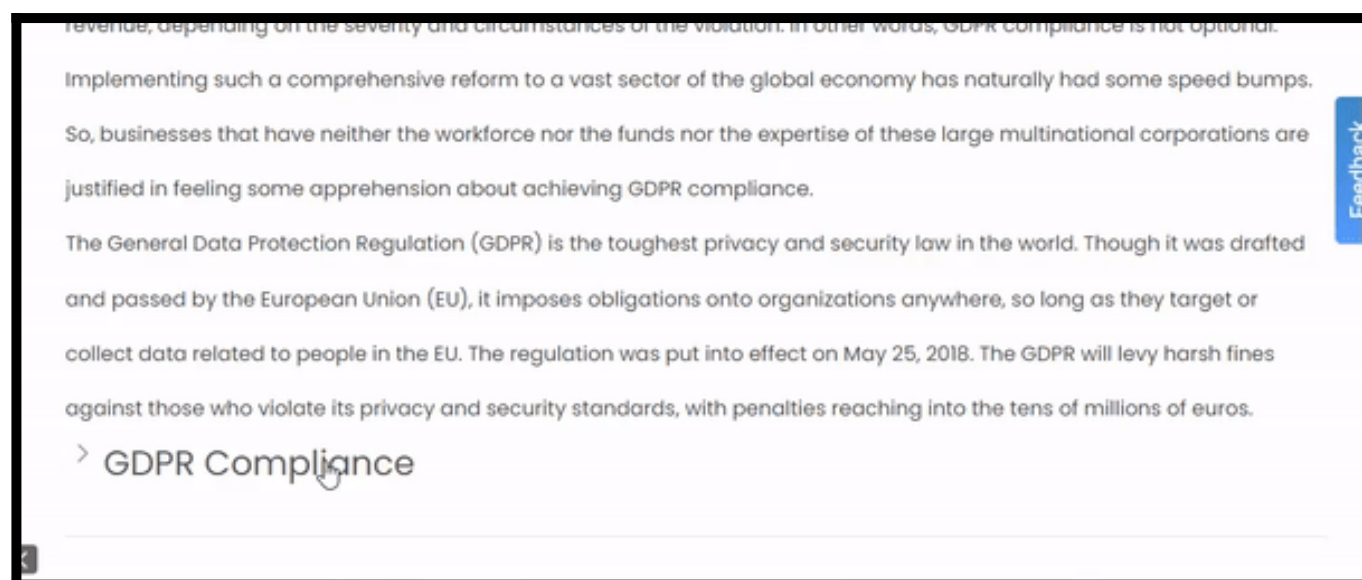


**Step 4:** Place the Toggle Content anywhere you want on the page. You can also drag the Toggle Content and create multiple copies at different locations on the page. When you're done, **save**

and **publish** the page.



This is how the toggle content appears on your page.



*That is all about adding the toggle content to your page.*

### Related Articles:

- [How to Create a Tooltip](#)
- [How to Add/Delete, Edit, or Copy a Page](#)
- [How to Customize the Homepage of Your Help Site](#)



# How to Add & Use Merge Tags

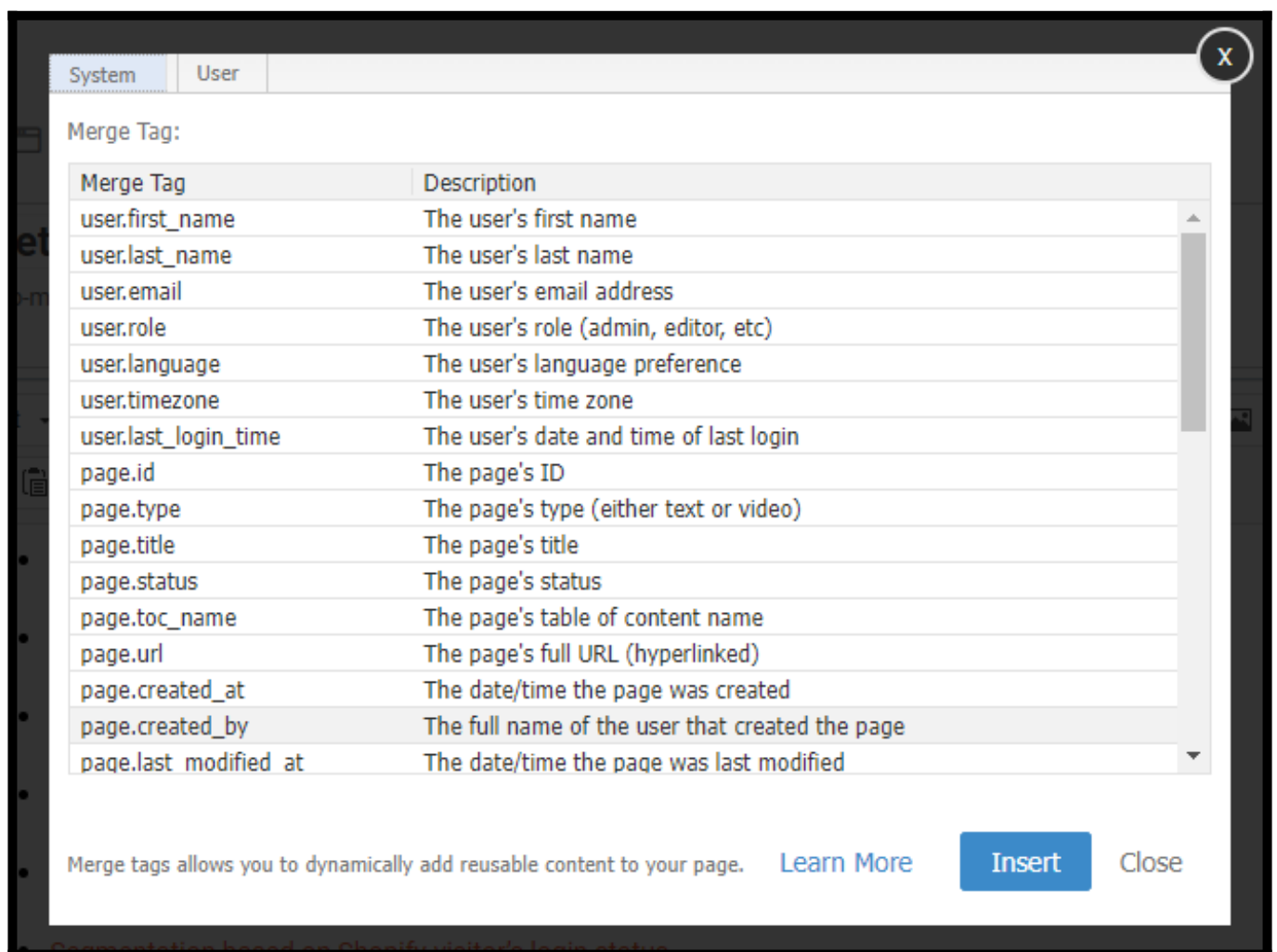
A merge tag is a small placeholder tag that may consist of a few words or strings of text, which you can add to any page on your help site. You can create merge tags once and use them multiple times across different pages on your help site.

**Note:** The text you add to the page is not formatted and is stored as plain text on publishing the page.

Merge tags are flexible and reusable. You can make site-wide changes by editing the merge tag source. It saves you from the tedious task of modifying tags on different pages separately.

**There are two types of merge tags:**

**1. System merge tags** - These are pre-defined tags that you can reuse to quickly update a page's content. You cannot alter or edit these tags.



System User

Merge Tag:

Merge Tag	Description
user.first_name	The user's first name
user.last_name	The user's last name
user.email	The user's email address
user.role	The user's role (admin, editor, etc)
user.language	The user's language preference
user.timezone	The user's time zone
user.last_login_time	The user's date and time of last login
page.id	The page's ID
page.type	The page's type (either text or video)
page.title	The page's title
page.status	The page's status
page.toc_name	The page's table of content name
page.url	The page's full URL (hyperlinked)
page.created_at	The date/time the page was created
page.created_by	The full name of the user that created the page
page.last_modified_at	The date/time the page was last modified

Merge tags allows you to dynamically add reusable content to your page. [Learn More](#) [Insert](#) [Close](#)

**2. Custom merge tags**- You can create tags per your requirements and add them to pages on your help site.

System User

Merge Tag:

Merge Tag	Value	Default Value
user.last_name		Pritam

Merge tags allow you to dynamically add reusable content to your pages. [Learn more](#)

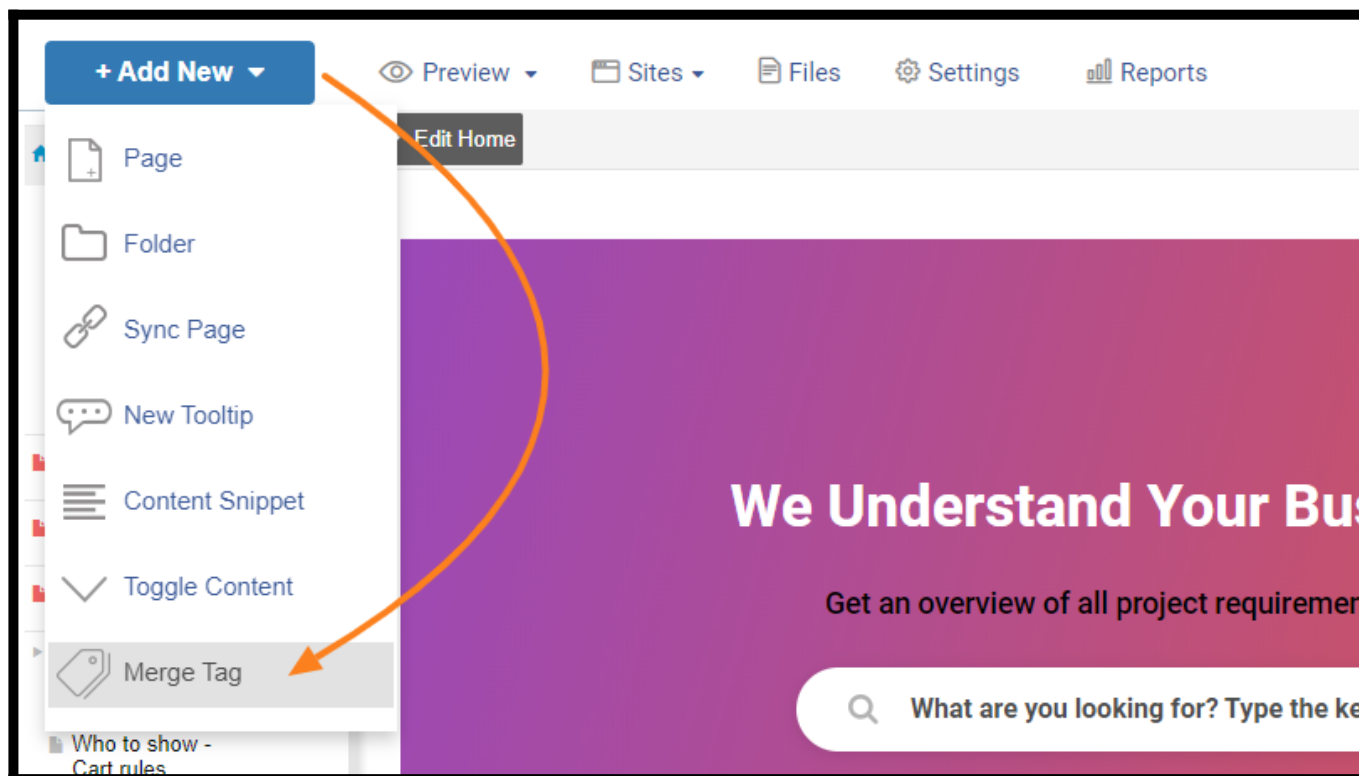
Insert Close

In this article, you'll learn:

- [How to Create a Merge Tag](#)
- [How to View, Edit, and Delete Merge Tags](#)
- [How to Add a Merge Tag to a Page](#)
- [How to Add Custom Color to Merge Tags](#)

## How to Create a Merge Tag

**Step 1:** On your ProProfs Knowledge Base dashboard, go to **+Add New > Merge Tag**.



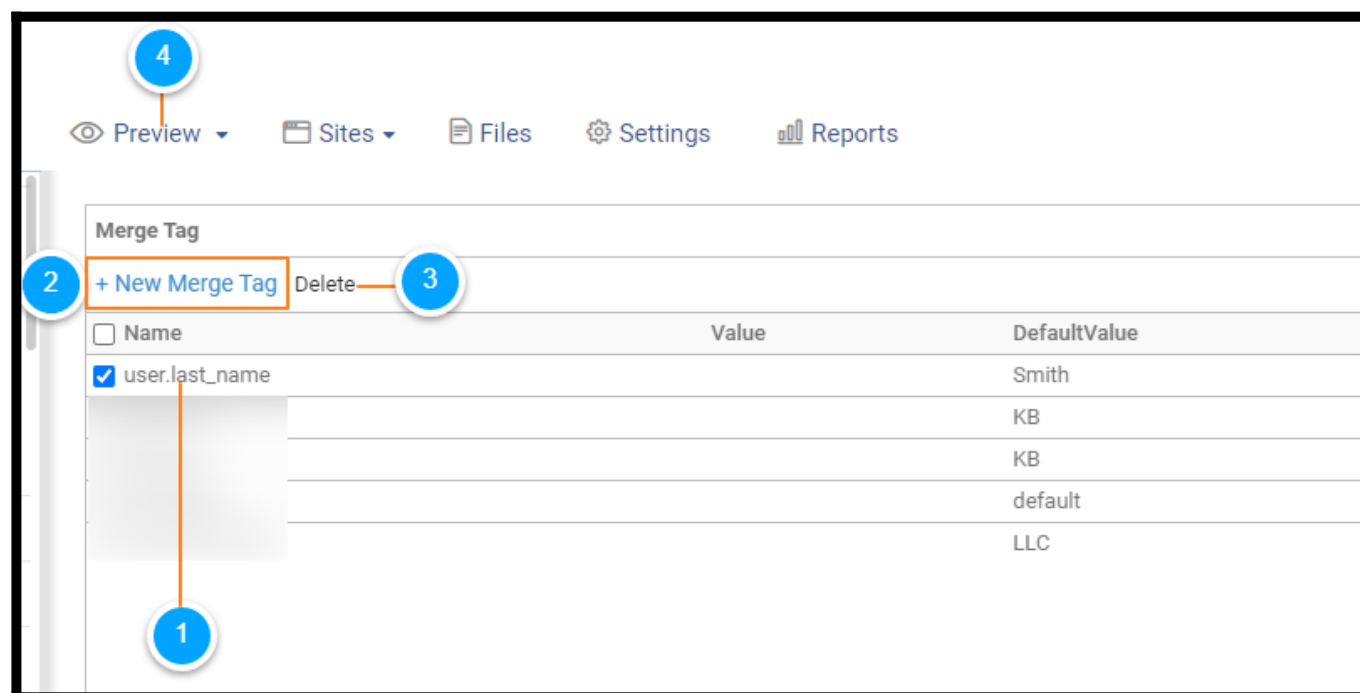
**Step 2:** Provide the **Title** and **Default Value** for the placeholder. Click on **Save**.

- **Title** - Enter the name of the tag you want to create.
- **Default Value** - Enter the default value of your tag. This value will display by default if you haven't defined any tag value.

*You have successfully added a new merge tag.*

After adding a new merge tag, you will see a window **displaying all the custom tags** you have created till now.

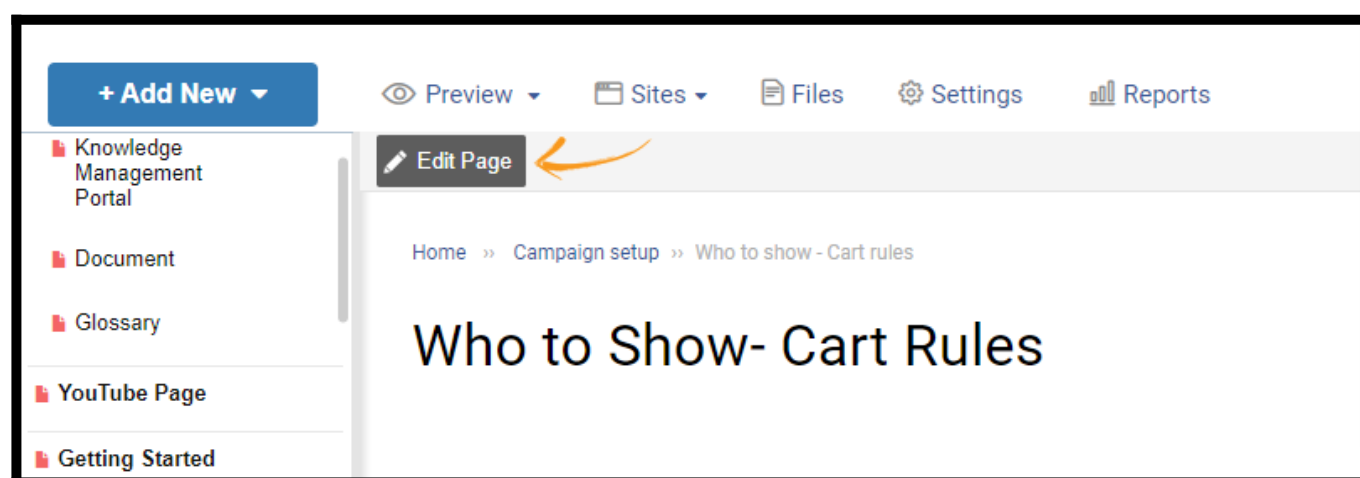
Copyright © 2014 ProProfs



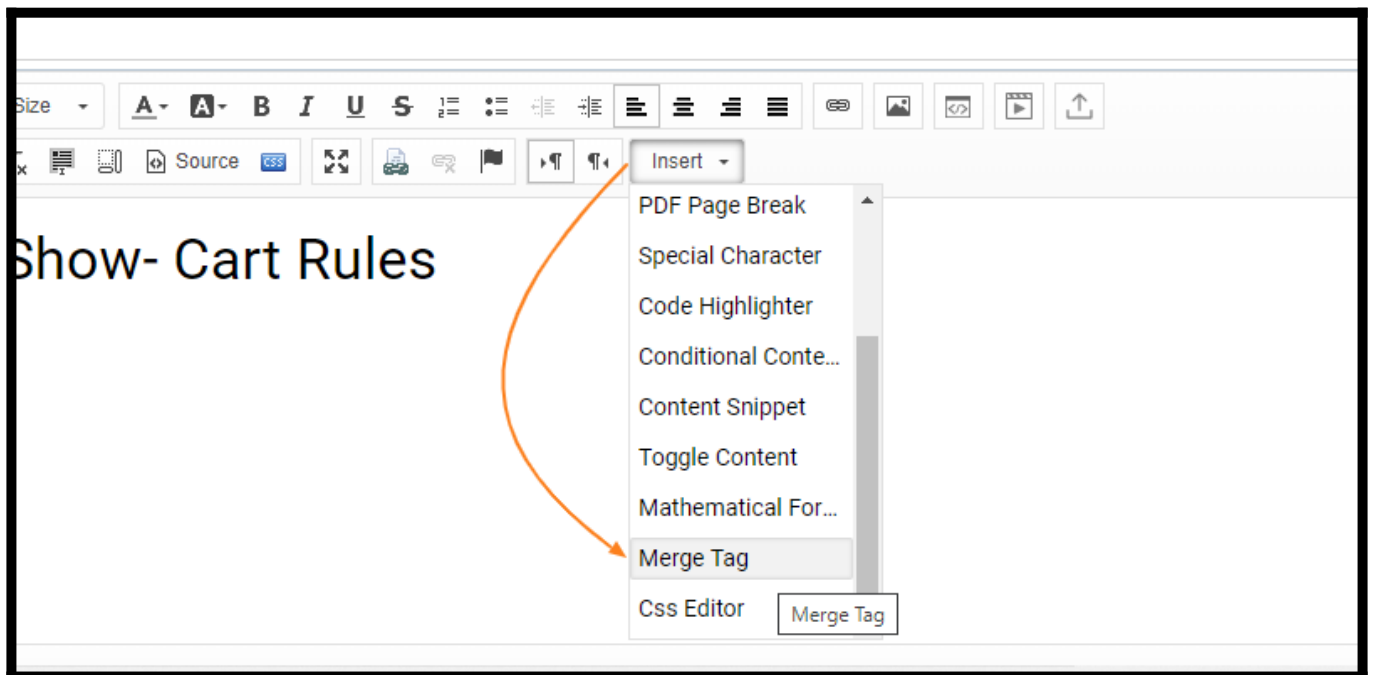
1. **Edit** a merge tag by clicking on its name.
2. **Create** a new merge tag.
3. **Delete** a merge tag.
4. You can access the page through **Preview > Merge Tags**.

## How to Add a Merge Tag to a Page

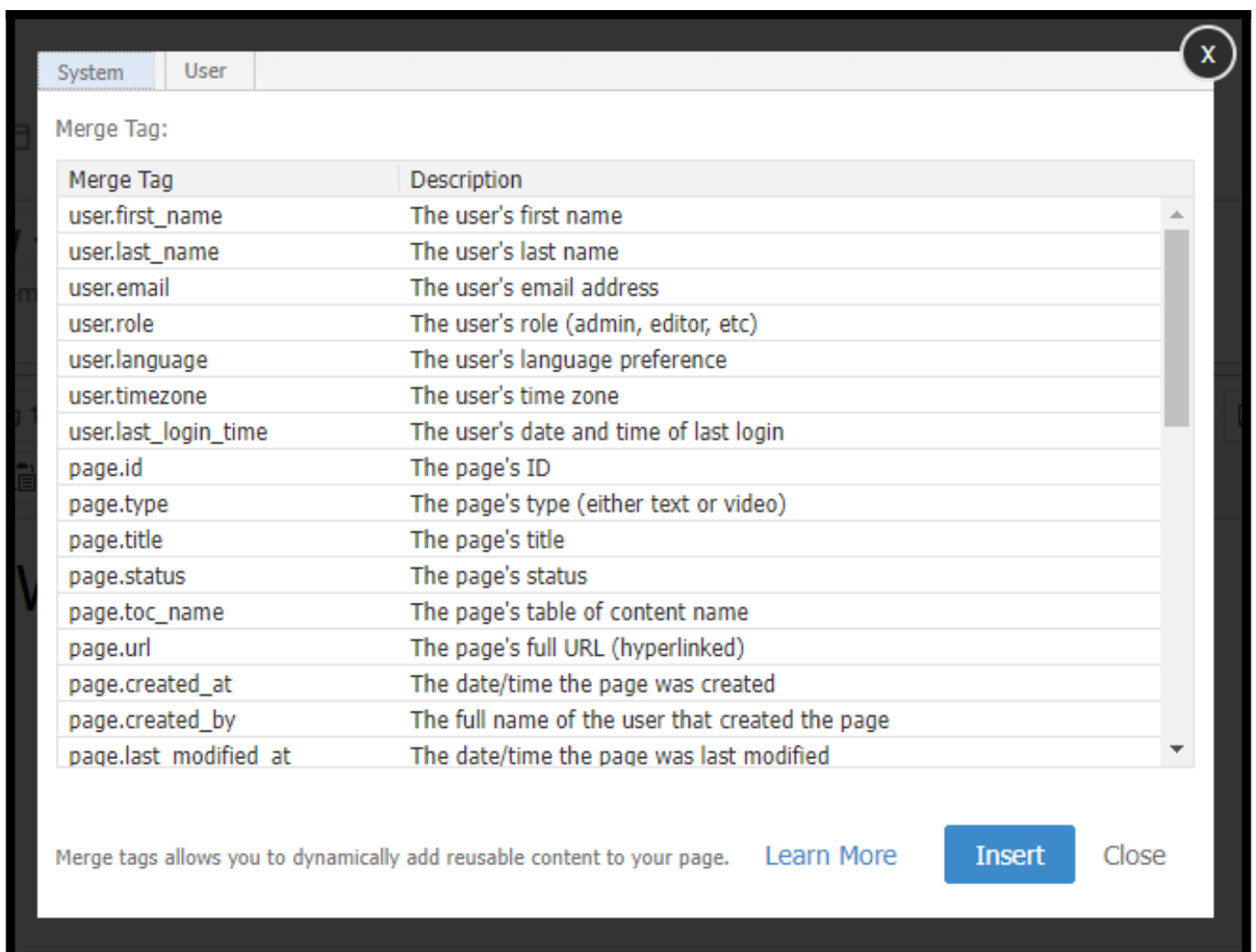
**Step 1:** Navigate to the page in the TOC where you wish to add the merge tags and click **Edit Page**.



**Step 2:** Go to **Insert > Merge Tag** in the toolbar.



**Step 3:** Select the **System Merge Tag** or **Custom Merge Tag** and click **Insert** to add it to the page.



## When to Use System Merge Tags

ProProfs [Knowledge Base](#) offers a library of system merge tags you can use at a click. Here are some scenarios where you can use system merge tags:

**1. User Identification** - Use these tags to identify the profile of the author or editor who created or made changes/edits to a particular page on your help site.

Tag Name	Description
user.first_name	Display the first name of the user.
user.last_name	Display the last name of the user.
user.email	Display email address of the user.
user.role	Display the role of the user like admin, editor, etc.
user.language	Display the language preference of the user.
user.timezone	Display timezone of the user
user.last_login_time	Display the last login date and time of the user.

**2. Page identification** - Use these tags to identify the attributes of a page, such as its title, id, status, etc.

Tag Name	Description
page.id	Display unique id of the page.
page.type	Display the type of the page as text or video.
page.title	Display the title of the page.
page.status	Display status of the page like published, draft, etc.
page.toc_name	Display the name of the page on the table of content.
page.url	Display URL of the page.
page.created_at	Display the date and time of the page when the page was created.
page.created_by	Display full name of the user who created the page.
page.last_modified_at	Display date and time of the page when the page was last modified.

page.last_modified_by	Display full name of the user who modified the page last time.
page.published_at	Display date and time of the page when the page was last published.
page.published_by	Display full name of the user who published the page last time.
page.related_articles	Display the related articles on the page.
page.published_till	Display the expiry date of the page.

**3. Navigation** - Use these tags to add navigation menus to a page, such as the "**Next**" or "**Previous**" link, breadcrumbs, inline, and more.

Tag Name	Description
page.next_page	Display a hyperlink of the next page based on the table of content order.
page.next_page_url	Display URL of the next page based on the table of content order.
page.previous_page	Display a hyperlink of the previous page based on the table of content order.
page.previous_page_url	Display URL of the previous page based on the table of content order.
page.breadcrumb	Display the breadcrumb based on the table of content. Ex - You are here XYZ.
page.pages_in_folder	Display all the pages located in the folder.
page.folder_name	Display the name of the folder in which the page is located.
page.children_pages	Display all the pages located inside the page as a hyperlink.
page.inline_toc	Scan the headings on the current page to create an inline table of content based on those headings
page.embed_page	Display the embedded page.

**4. Additional information** - Use these tags to give additional information about your company, website, recently published pages in your knowledge base and more.

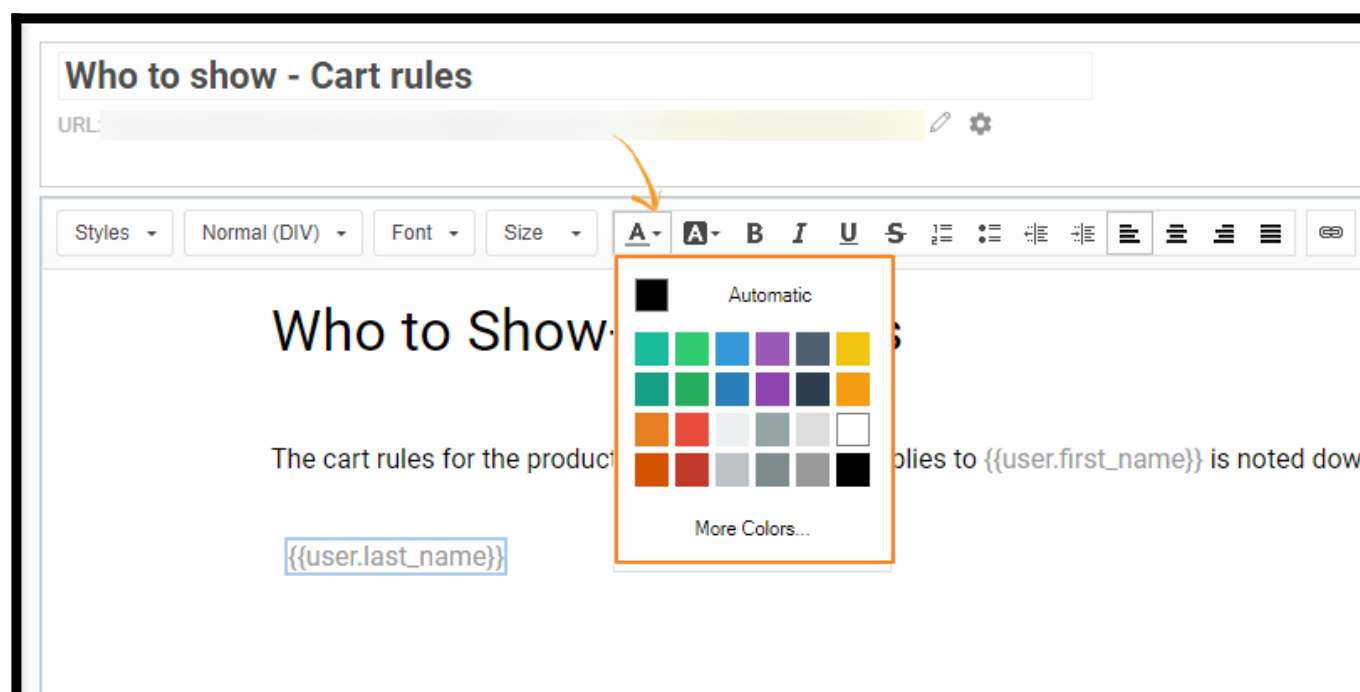
Tag Name	Description
site.name	Display the name of the help site.
site.url	Display the URL of the help site.



site.language	Display the language of the help site.
site.recently_published_pages	Display the most recently published page.
company.name	Display company name.
company.website	Display company website.

## How to Add Custom Color to Merge Tags

Once you add the merge tag, **click the tag** and go to the **text color** in the toolbar. **Select** the color for your merge tag.



After selecting a color, **save** the page and click **Preview**.

Alternatively, you can use [Content Snippets](#) to insert short content pieces that you write once and use on many pages.

*That is all about adding & using merge tags in your knowledge base.*

### Related Articles:

- [How to Add a Sync Page](#)
- [How to Add Content Snippets](#)
- [How to Create a Multi-Branding Help Site](#)

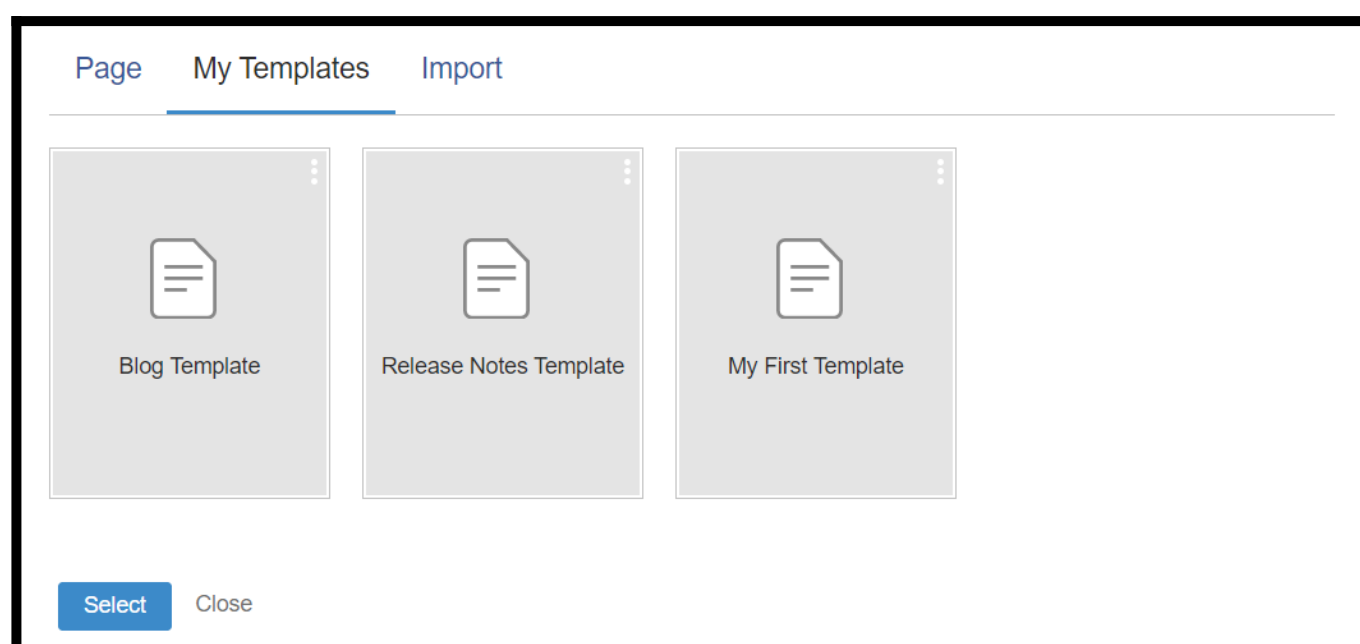
# How to Create a Page Template

Save any existing help center articles as a template for future use. You can find these templates under my templates tab when adding a new page to your help center.

## Benefits of creating a page template:

- Easy to create a new page on the same theme for a new folder or site
- Saves time and effort in creating pages with similar information

Below is a collection of page templates in the ProProfs Knowledge Base:



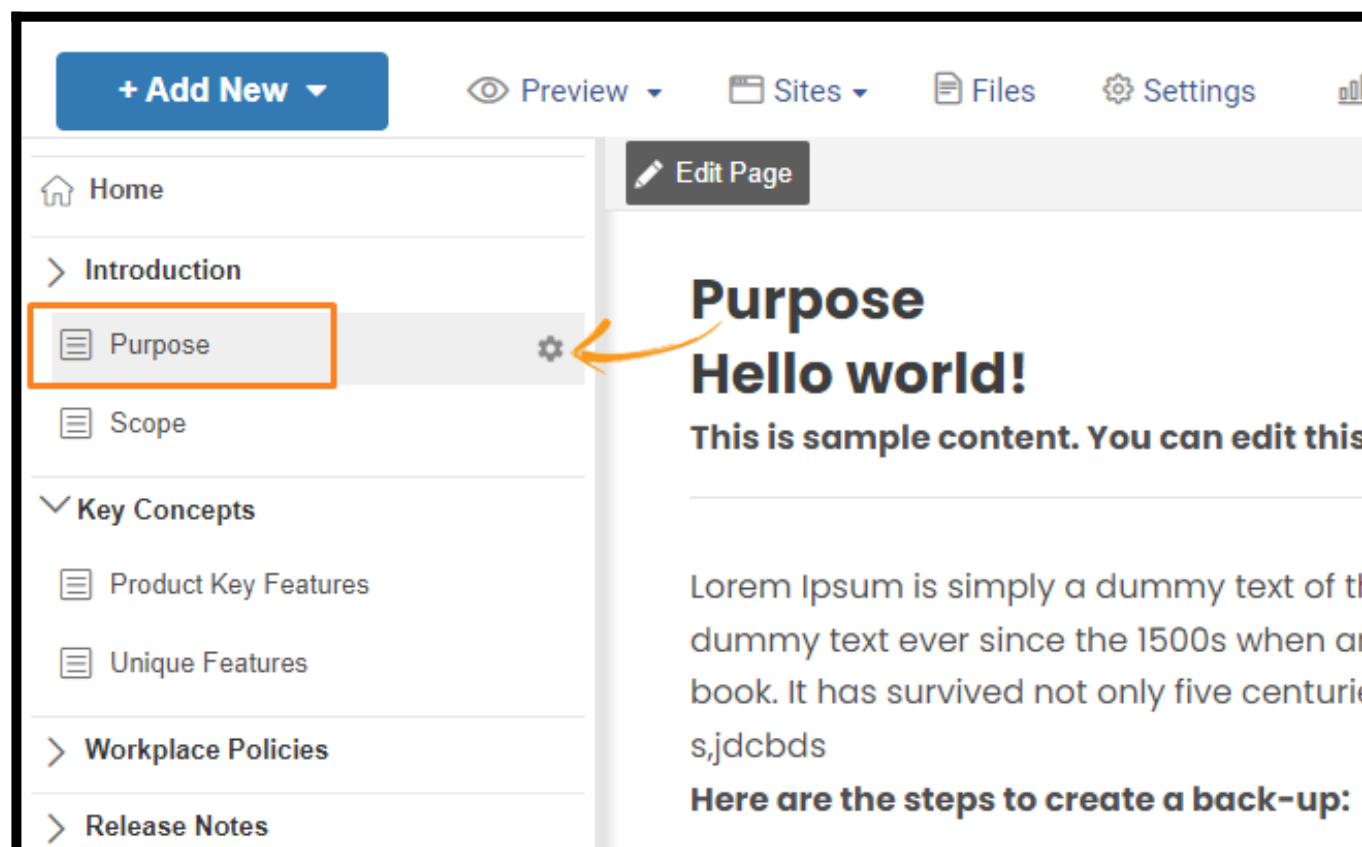
In this article, you'll learn:

1. [How to Create a Page Template](#)
2. [How to Use a Template](#)

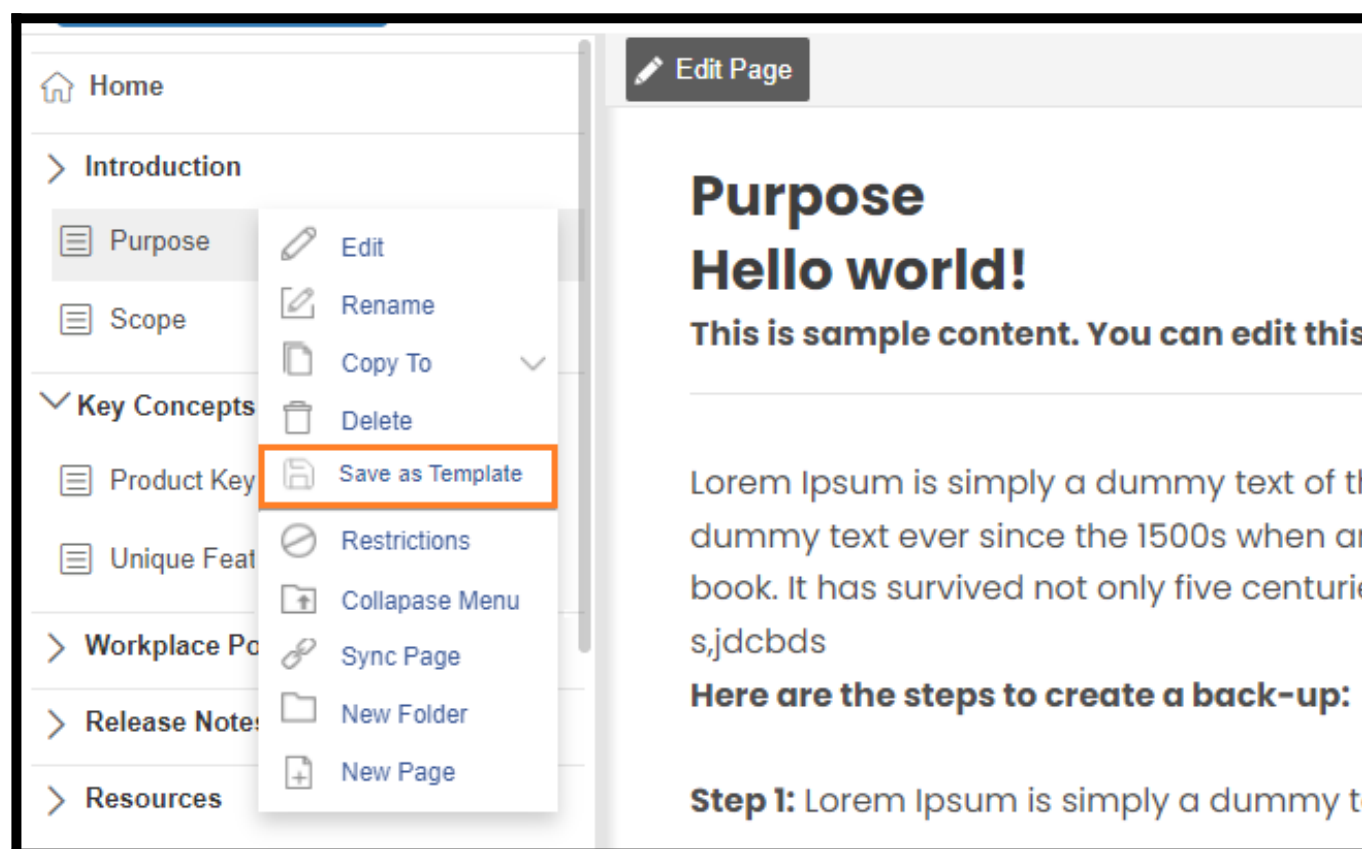
## How to Create a Page Template

**Step 1:** In your ProProfs Knowledge Base account,

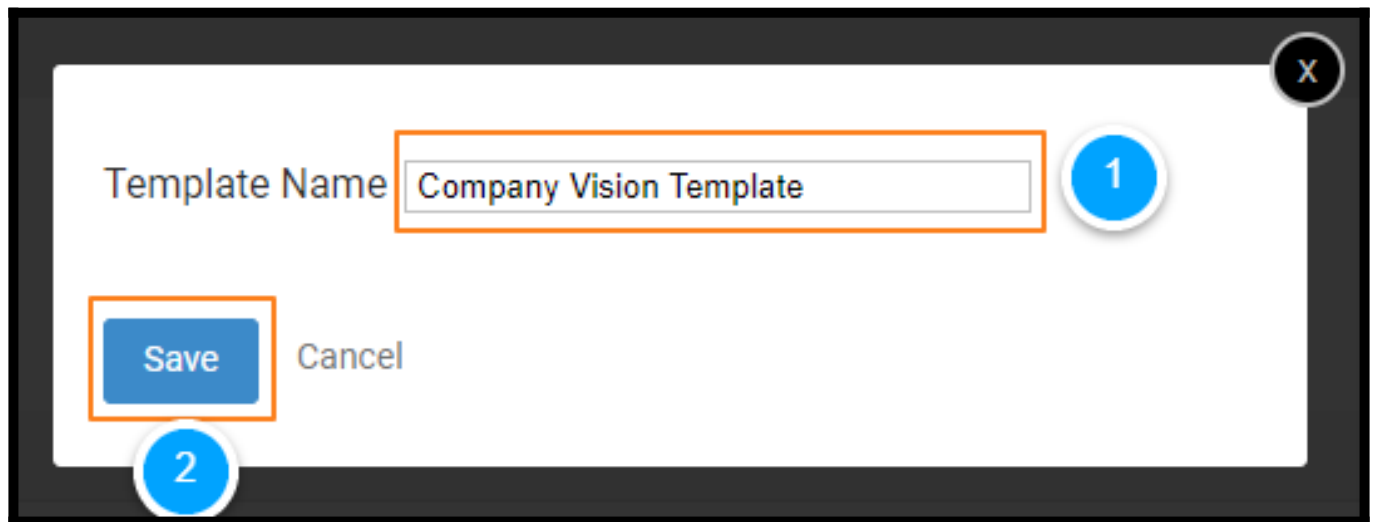
- Navigate to the **Page** in the TOC on the left panel
- Click on the **Gear** icon



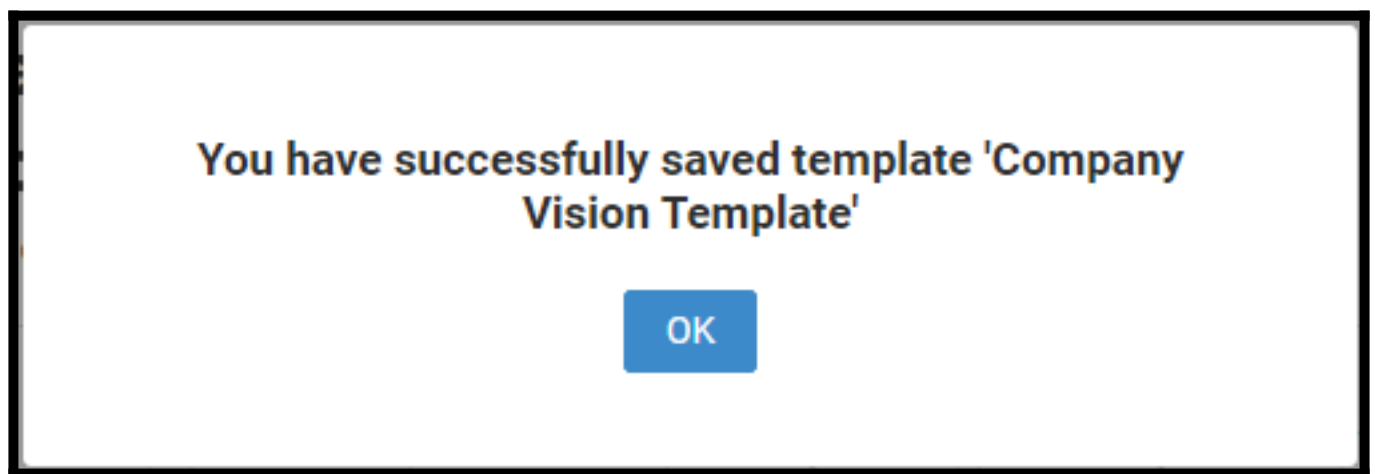
**Step 2:** Select **Save as Template** from the dropdown.



**Step 3:** Enter the **Template Name** in the pop-up box and click **Save**.



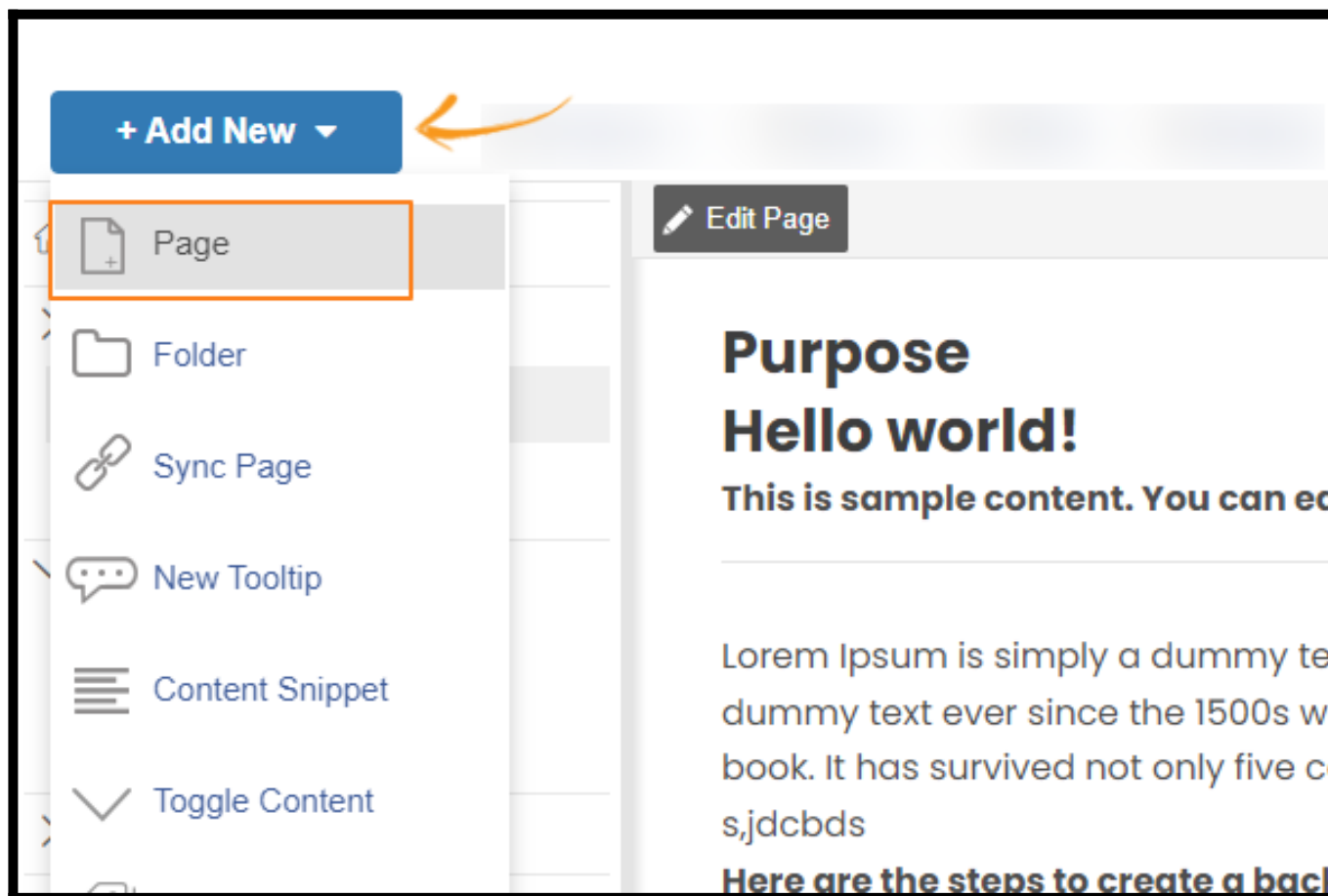
A screenshot of a web application's 'Add New' dialog box. The dialog has a dark gray border and a white background. In the top right corner, there is a circular close button with an 'X'. The main content area contains a label 'Template Name' followed by a text input field containing the text 'Company Vision Template'. A blue circular callout with the number '1' points to the input field. Below the input field, there are two buttons: a blue 'Save' button and a gray 'Cancel' button. A blue circular callout with the number '2' points to the 'Save' button.



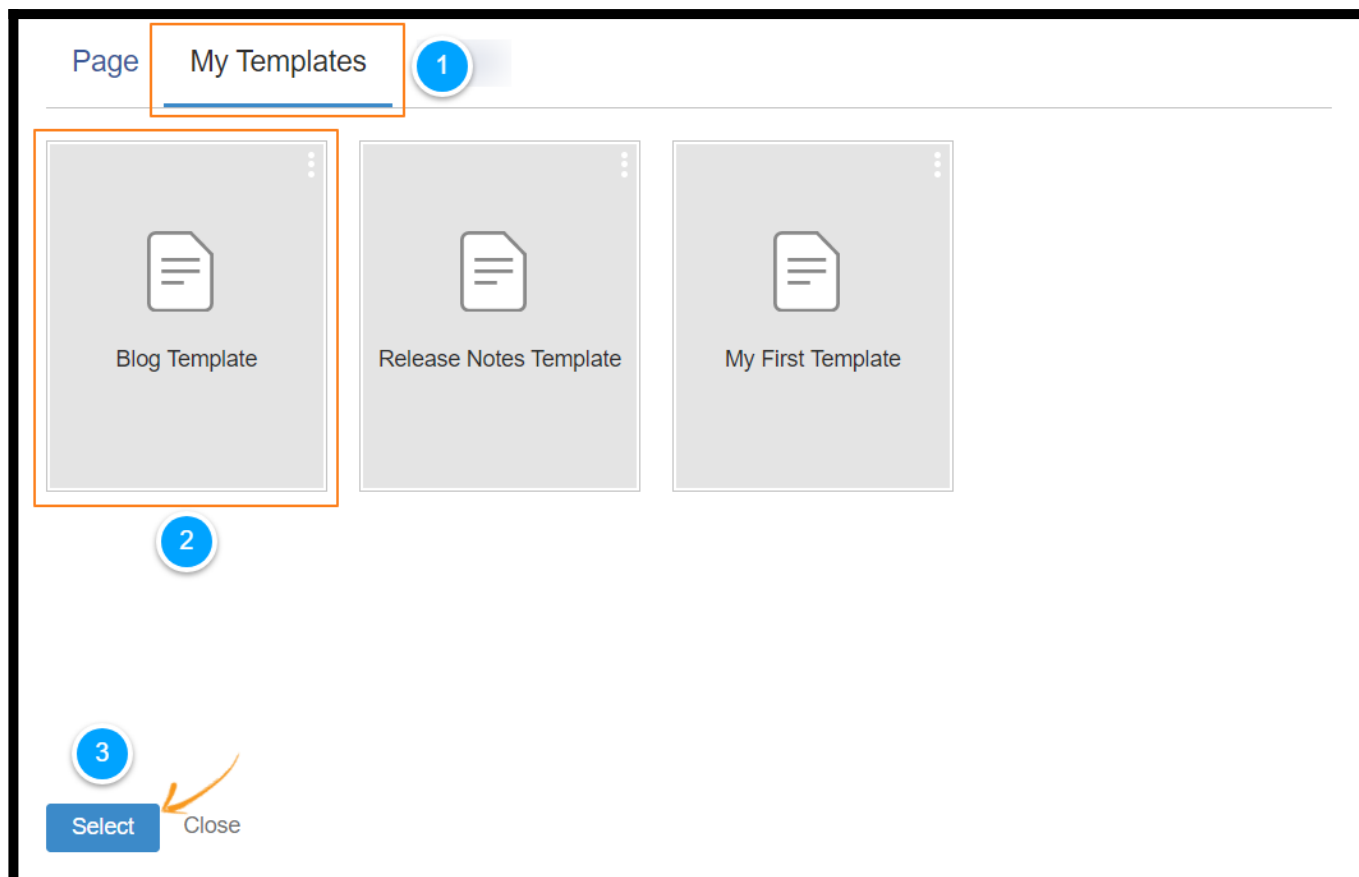
*You have successfully created a page template.*

## How to Use the Template

**Step 1:** Go to Add New > Page



**Step 2:** Under the **My Templates** tab, select the **Page Template** to add and click **Select**.



*Your page is ready for editing.*

*That is all about creating a page template and using it in the KB.*

### Related Articles:

- [How to Add Toggle Content](#)
- [How to Add, Copy, and Delete a Folder](#)
- [How to Add, Edit & Delete, and Copy a Page](#)

# Content Management

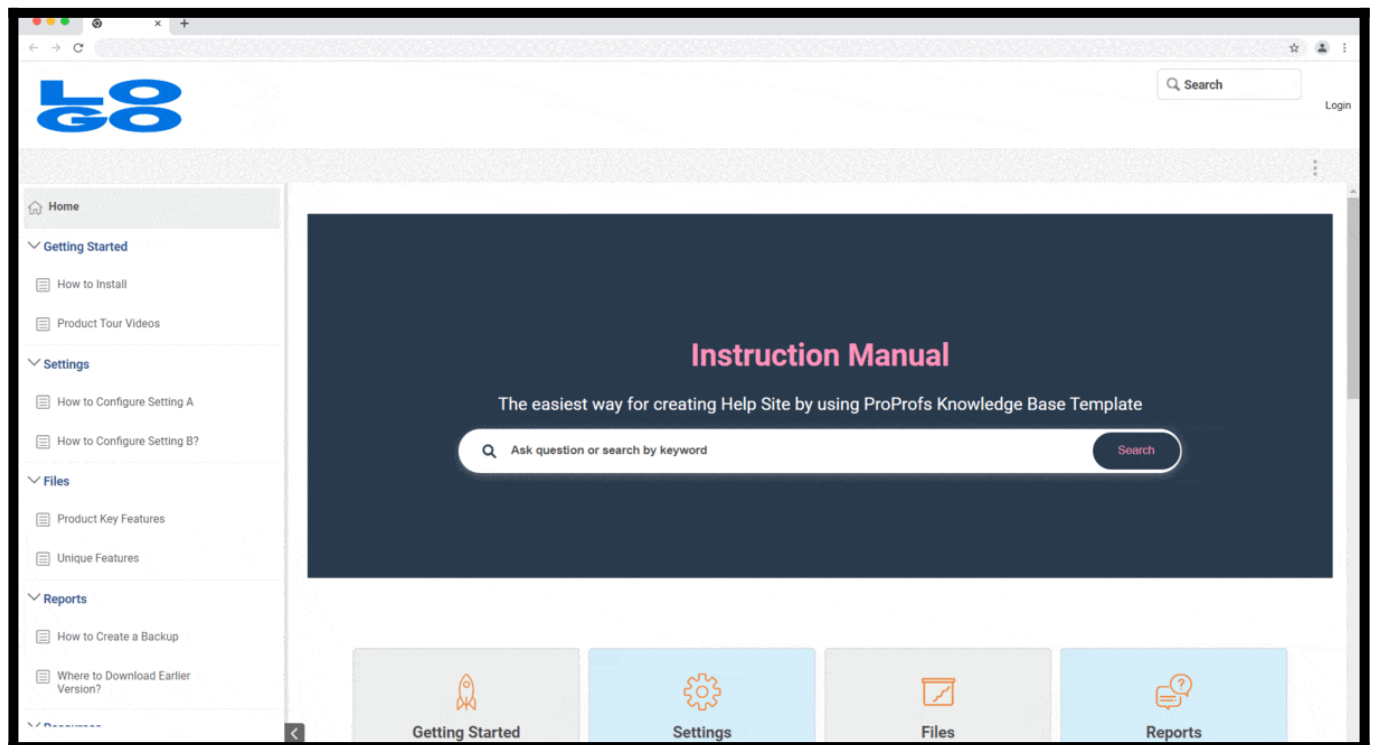
# How to Create a Multi-Branded Help Site

ProProfs Knowledge Base allows you to create multiple copies of a single help site and brand them differently. The Multi-Branded Site feature is advantageous when you have different products under an umbrella brand.

You can make each copy unique by putting a different logo on its home page.

The feature enables you to market the same help content for various products in a brand's portfolio. It also saves you time and effort in creating new help sites using existing ones.

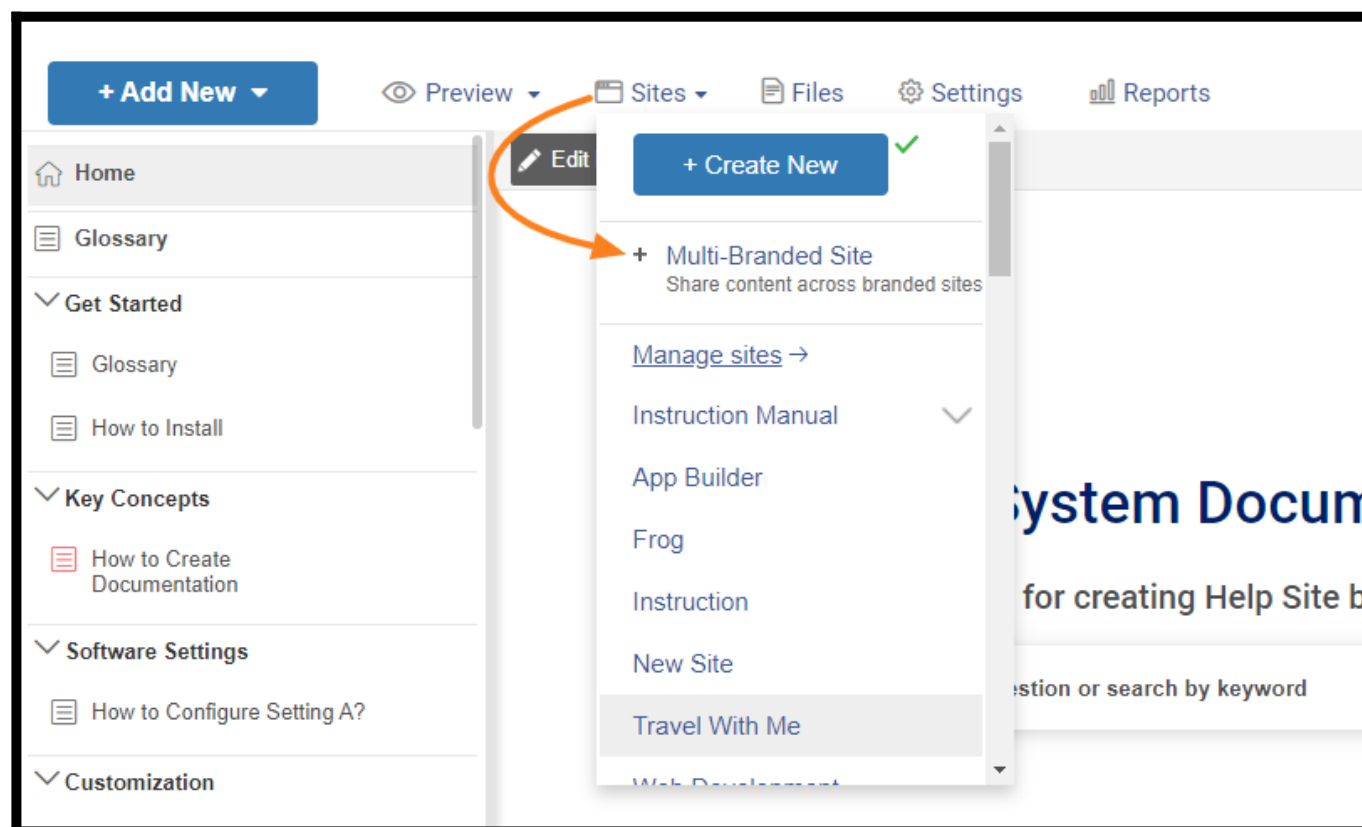
**Here's a preview of the multi-branded site feature in ProProfs Knowledge Base.**



## How to Create a Multi-Branded Help Site

**Step 1:** On the ProProfs Knowledge Base dashboard, go to **Sites > Multi-Branded Site**. A pop-up window opens.





**Step 2:** Follow the screenshot instructions to create a multi-branded site.

A screenshot of the 'Multi-Branded Site' creation form. The form has a title 'Multi-Branded Site' and a subtitle 'Create multiple brand templates that point to the same site'. It contains three numbered steps: 1. A text input field for the site name, highlighted with an orange border and a blue circle with the number 1. 2. A 'URL:' label followed by a text input field containing 'https://', a sub-domain field, and '.helpdocsonline.com', highlighted with an orange border and a blue circle with the number 2. 3. A 'Site Name:' label followed by a text input field, highlighted with an orange border and a blue circle with the number 3. Below the 'Site Name' field is the text 'The name of your site which will appear on the web browser title'. At the bottom, there are 'Create' and 'Cancel' buttons, with an orange arrow pointing to the 'Create' button.

**1: Hover over the white space,** and a drop-down list opens. **Select a site** whose template you

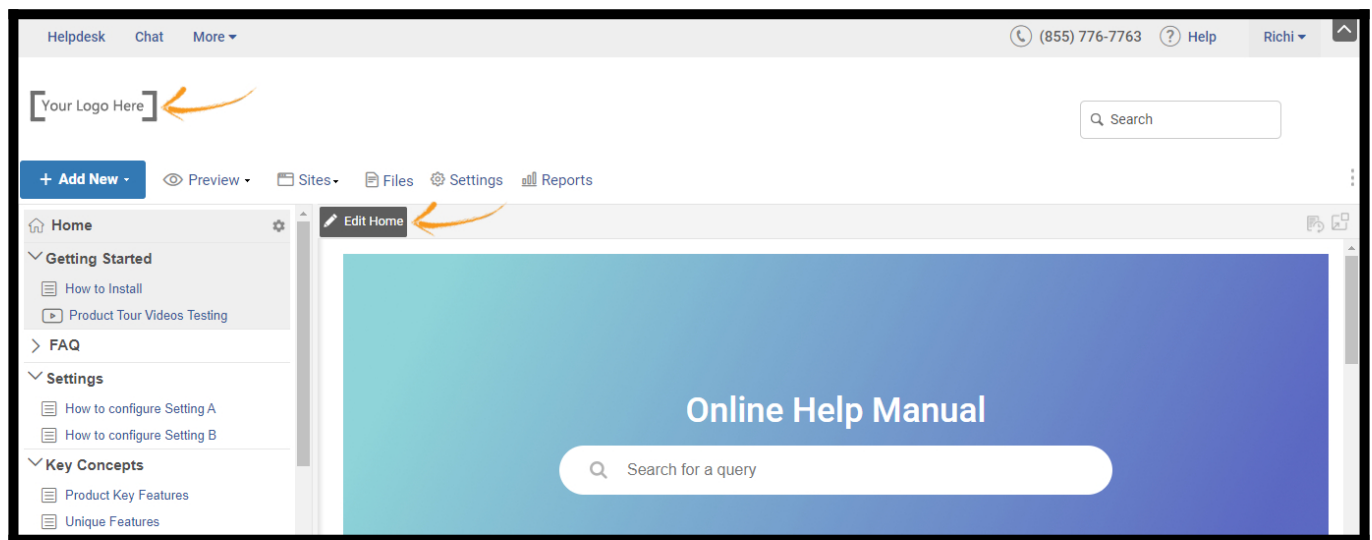
wish to use for the new version.

**2: Complete the URL.**

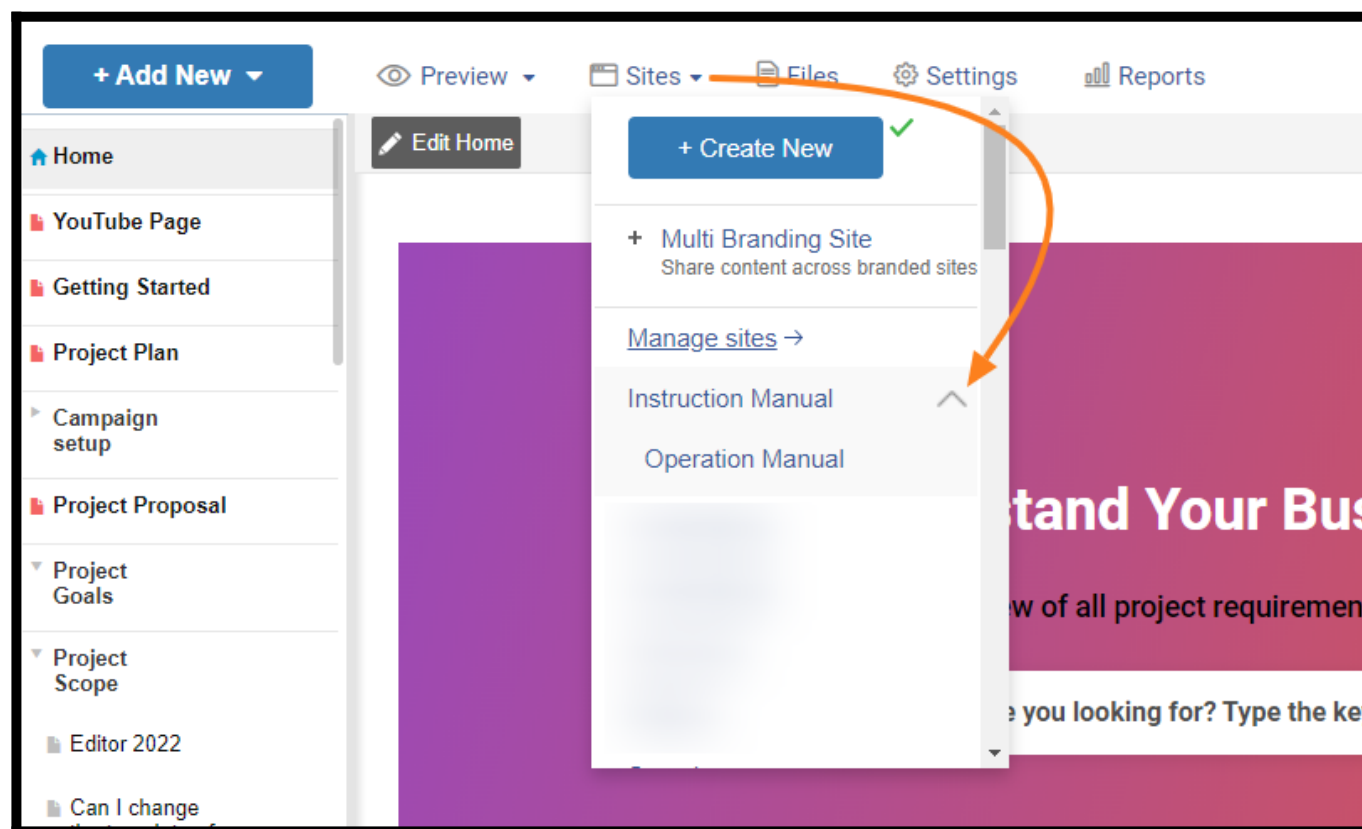
**3: Enter the name** of the multi-branded site you're creating.

**4: Click Create.**

**Step 3:** The template of your new multi-branded site is ready. You can customize it by adding a logo and editing the Home page.



**Step 4:** To see the multi-branded sites you've created, go to **Sites**. Locate the primary help site you've branched out to multiple brands (as shown in the screenshot below).



*That is all about creating multi-branded help sites.*

### Related Articles:

- [Guide to \(WYSIWYG\) Editor](#)
- [Supported File Types](#)
- [How to Create a Page Template](#)

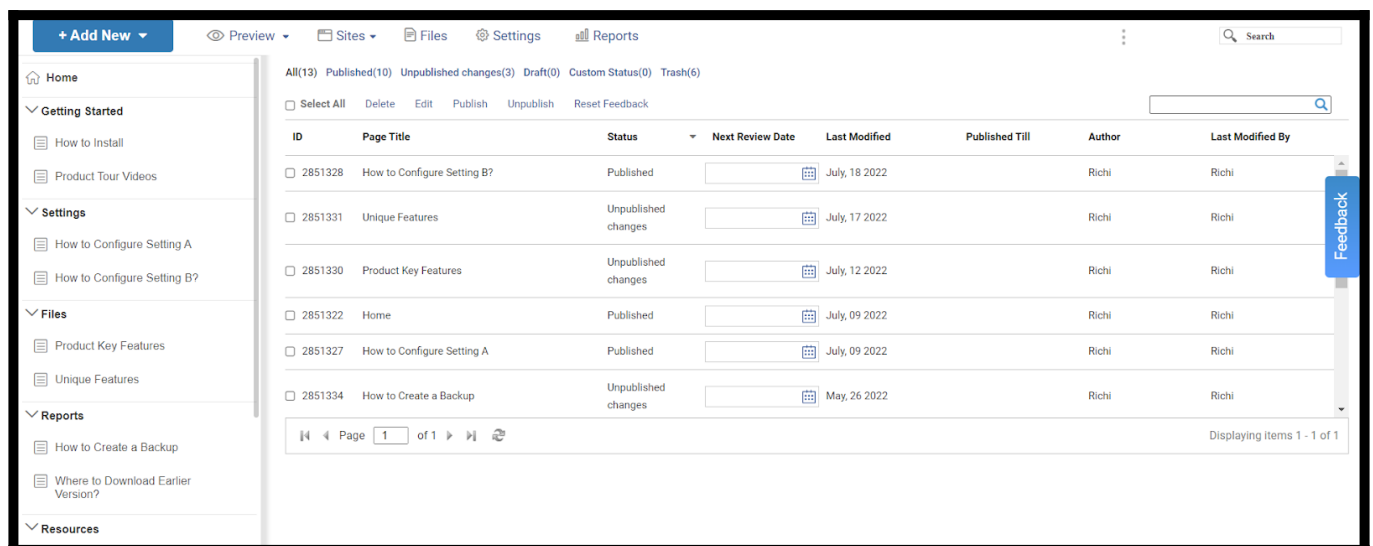
# How to View All the Pages in Your Knowledge Base

In the ProProfs Knowledge Base editor, you can view all your help site pages in a list form. This feature lets you view pages according to their statuses, such as published/unpublished, draft, and trash. It also allows you to select multiple pages for custom actions such as edit, delete, and publish/unpublish.

## Page views allow users to:

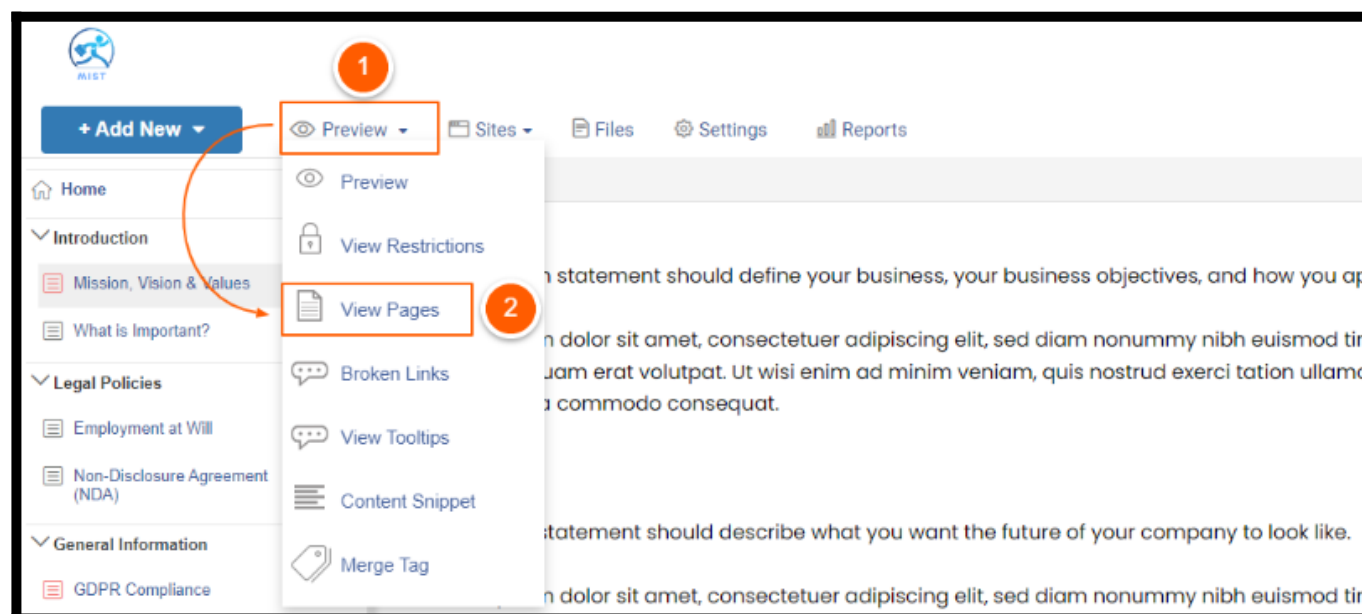
- Easily navigate to specific pages and take quick actions.
- Create custom filters to list and view particular pages.

Below is how the page view screen appears.

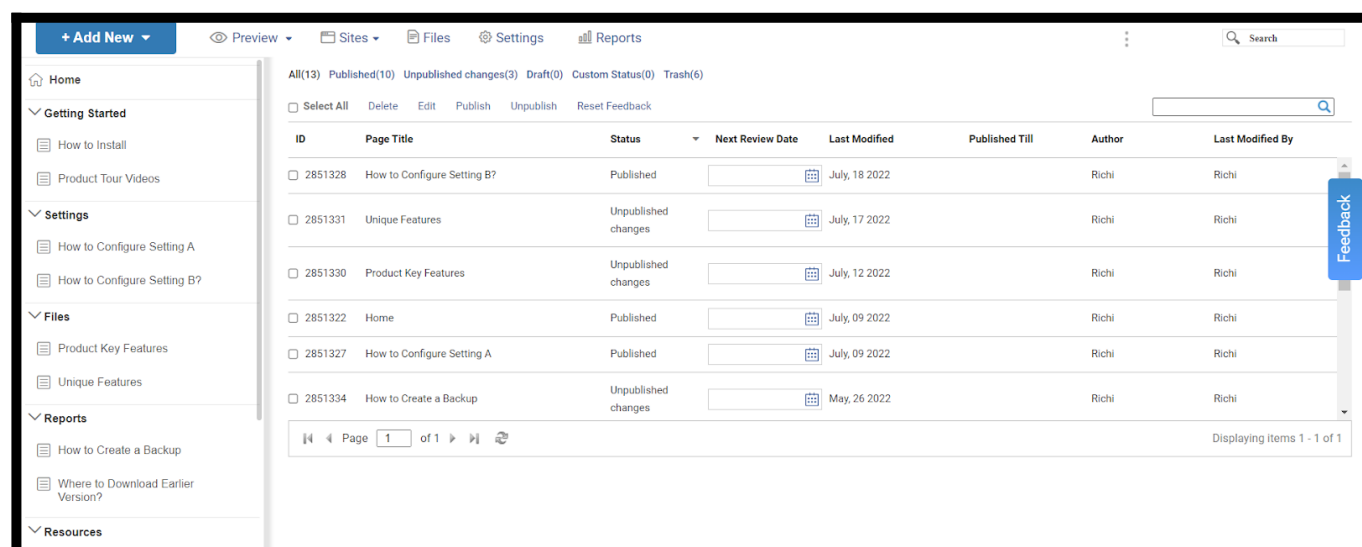


## How to Access and Manage Page Views

**Step 1:** In your ProProfs Knowledge Base Dashboard, go to **Preview > View Pages**.



You will see the list of all the pages.



## How to Sort the Page List

**Step 2:** Click on **any** of the page sorting options.

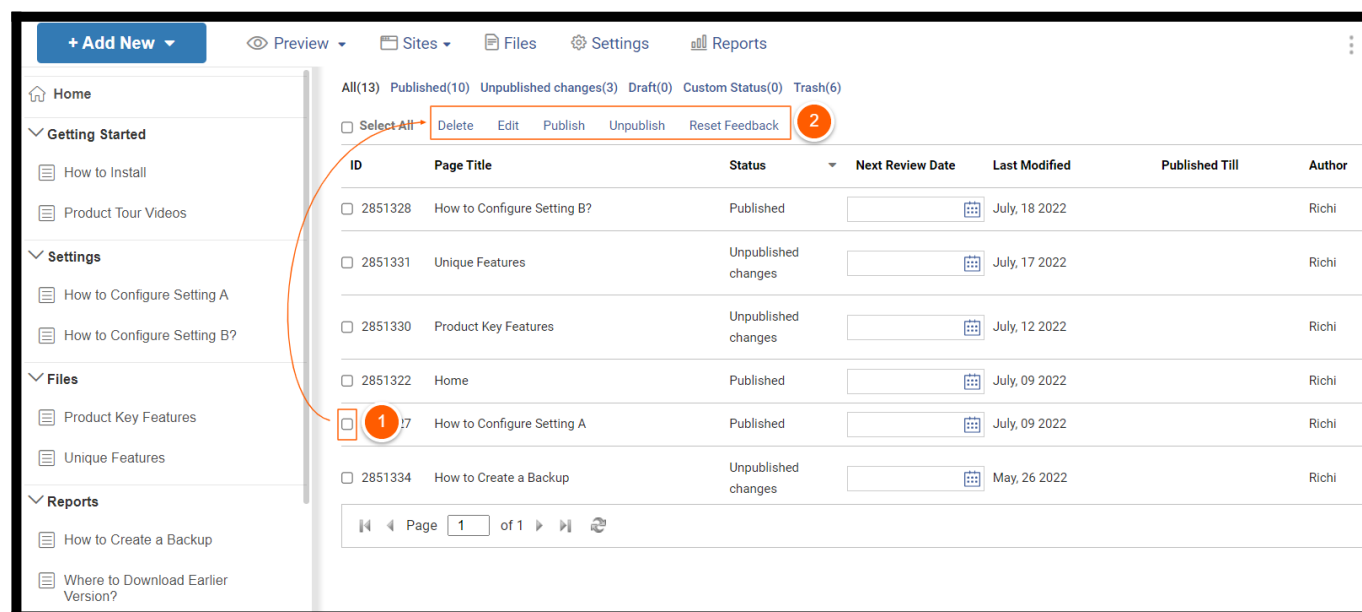
+ Add New		Preview	Sites	Files	Settings	Reports
Home		All(13) Published(10) Unpublished changes(3) Draft(0) Custom Status(0) Trash(6)				
Getting Started		Select All Delete Edit Publish Unpublish Reset Feedback				
Settings		ID	Page Title	Status	Next Review Date	Last Modified
Files						Published Till
Reports						Author
		<input type="checkbox"/>	2851328 How to Configure Setting B?	Published	<input type="text"/>	July, 18 2022 Richi
		<input type="checkbox"/>	2851331 Unique Features	Unpublished changes	<input type="text"/>	July, 17 2022 Richi
		<input type="checkbox"/>	2851330 Product Key Features	Unpublished changes	<input type="text"/>	July, 12 2022 Richi
		<input type="checkbox"/>	2851322 Home	Published	<input type="text"/>	July, 09 2022 Richi
		<input type="checkbox"/>	2851327 How to Configure Setting A	Published	<input type="text"/>	July, 09 2022 Richi
		<input type="checkbox"/>	2851334 How to Create a Backup	Unpublished changes	<input type="text"/>	May, 26 2022 Richi
		Page 1 of 1				

### Under Page sorting options:

- **All:** All the pages are shown in the list regardless of their status.
- **Published:** Only the pages that are published are shown in the list. Published pages include only originally published pages.
- **Unpublished:** Only the unpublished pages are shown in the list. Any recent changes that are saved but not published will not be live. Hence, their current status will be shown as **“Unpublished.”**
- **Draft:** Only the pages being created for the first time are considered in the draft. It would be best if you didn't confuse it with unpublished pages. Only a published page can have its status changed to Unpublished.

### How to Manage the Pages

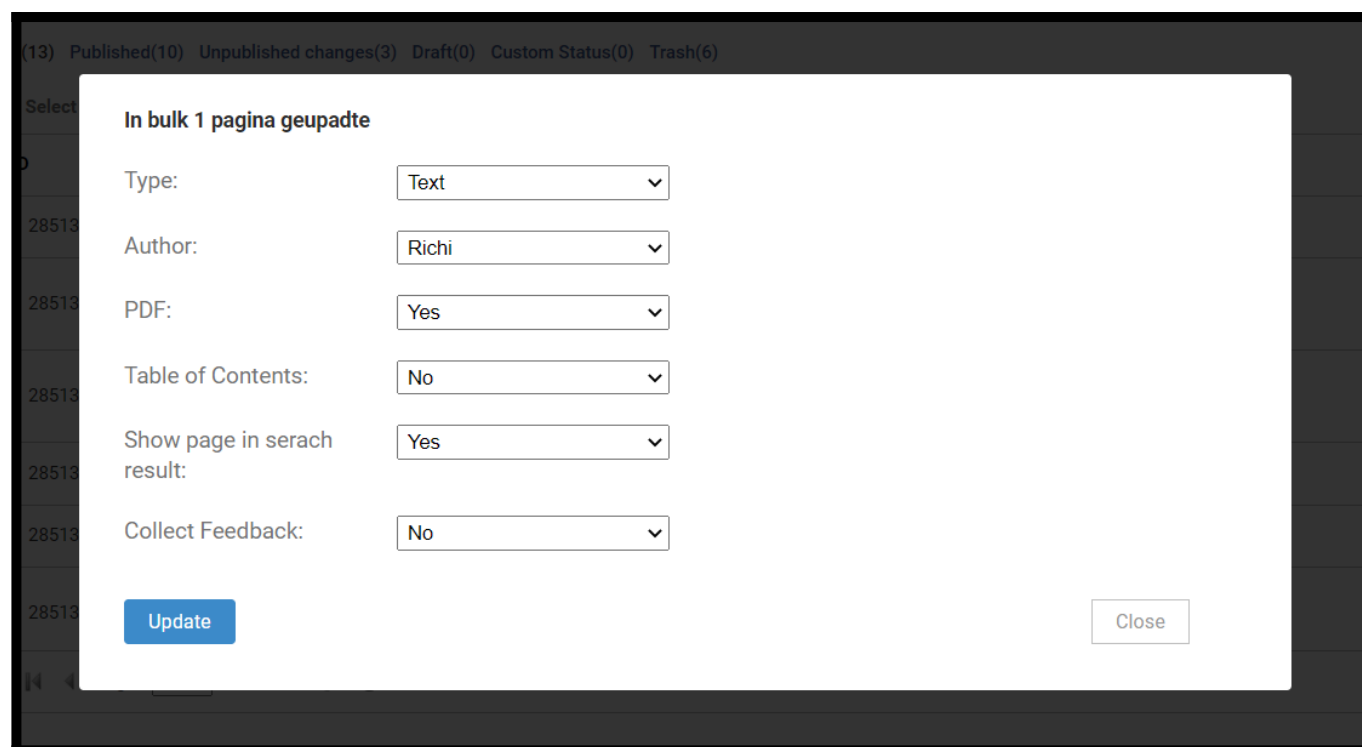
**Step 3:** Select the **page** and click on the **required page** action.



## Understanding page actions

- **Delete:** Select and delete a page or pages.
- **Edit:** Edit a single or multiple pages.

The screenshot below shows what the **Edit window** looks like. You can change the page type between text/video, add the author name, download the page/pages as PDF, hide/unhide the page from TOC, show/don't show in the search results, and allow feedback to be collected.

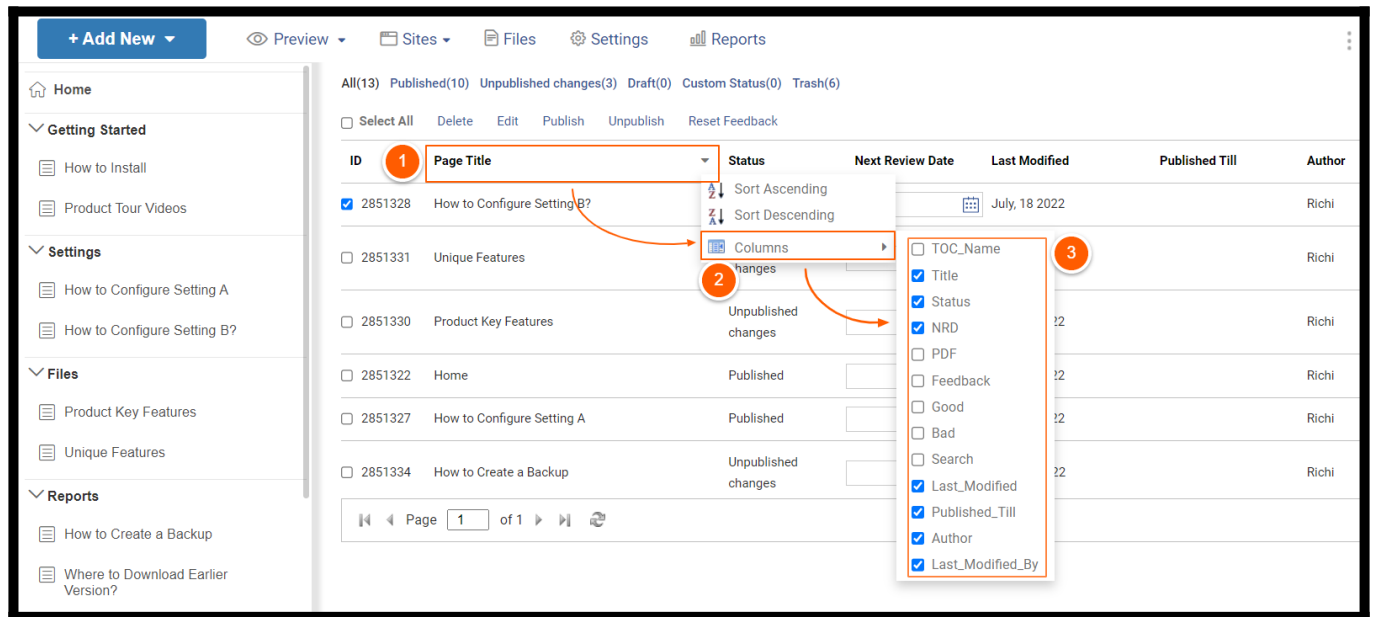


- **Publish:** Select a page or pages and hit Publish to make them live.

- **Unpublish:** You can unpublish a page or pages with this option. It is useful when, for example, the content on a page has become outdated and is no more beneficial for the viewer. You can unpublish it to hide it from public view.
- **Reset Feedback:** If you've received feedback on a page, this option resets the feedback to zero. Just select a page/pages and click 'Reset Feedback.'

## How to Sort the Page List According to Page Title

**Step 4:** Hover the cursor over **Page Title** and click **> Columns**. Check/uncheck the column names you want to show/hide.



## Understanding Column Categories

- **TOC Name:** This means the page's title, which is displayed in the Table of Contents.
- **Page Title:** It is the title that will appear on the page. Also, this is shown as a link on the **View Pages** dashboard to open a particular page.
- **Status:** Represents a page's status, such as **Published**, **Unpublished**, **Draft**, and **In-Progress**.
- **PDF:** This allows you to download a page as a PDF.
- **Good:** This represents the total number of positive feedback your page has received.
- **Bad:** This represents the total number of negative feedback your page has received.
- **Search:** Enabling this shows a page in the search results.
- **Last Modified:** It tells when a page was last edited.
- **Author:** Shows the name of the person who created a page.

*That is all about viewing options in the ProProfs Knowledge Base.*



### Related Articles:

- [Home Page](#)
- [How to Add and Publish a Page](#)
- [How to Add, Copy, and Delete a Folder](#)

# Guide to (WYSIWYG) Editor

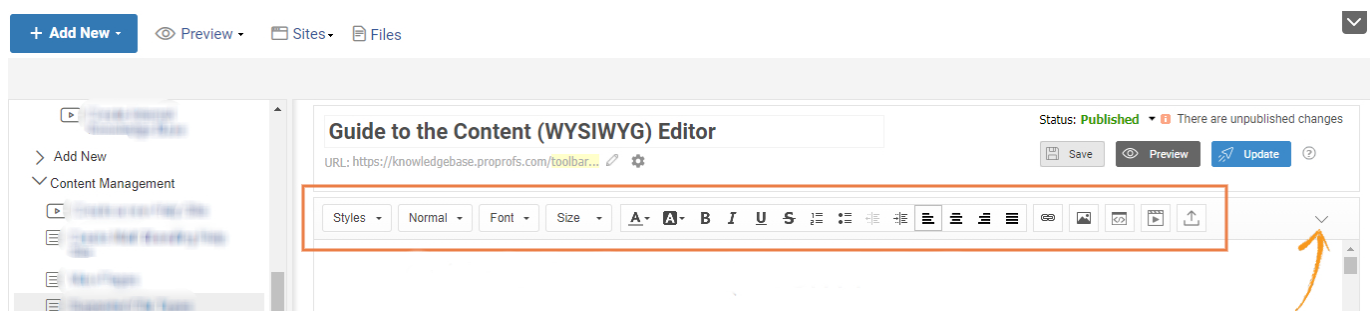
The **WYSIWYG (What You See Is What You Get) Editor** enables you to create the help pages you want. It is simple and absolutely easy to use. You get all the editing and customization options for your requirements.

You can use a variety of heading tags, insert images, embed YouTube videos, interlink with other help pages, and do a lot more with the editor. You can even access the page's source code and make certain changes to it if you're a coder.

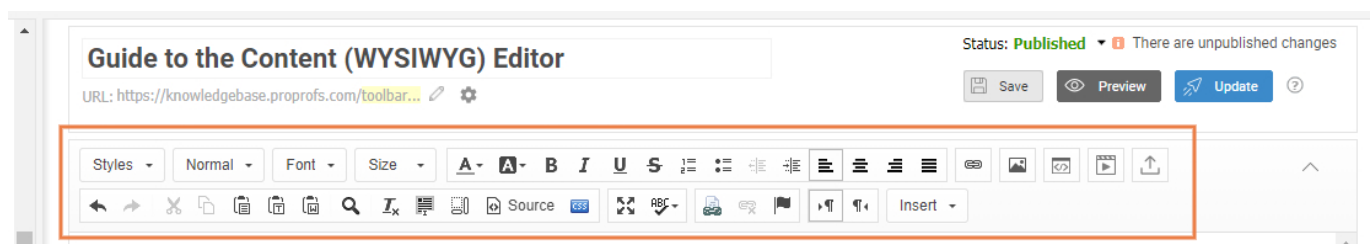
## Benefits of the WYSIWYG editor:

- Edit and customize the entire content of the article the way you want.
- You do not need to possess any coding knowledge to use the editor.
- If you know how to code, the editor also gives you the option to access a page's source HTML code.

When you attempt to create or edit a page, this is how the toolbar appears (highlighted in the box). To expand the toolbar, click on the small down arrow button at the far right of the toolbar, as shown in the screenshot below:



Shown below is the complete toolbar.



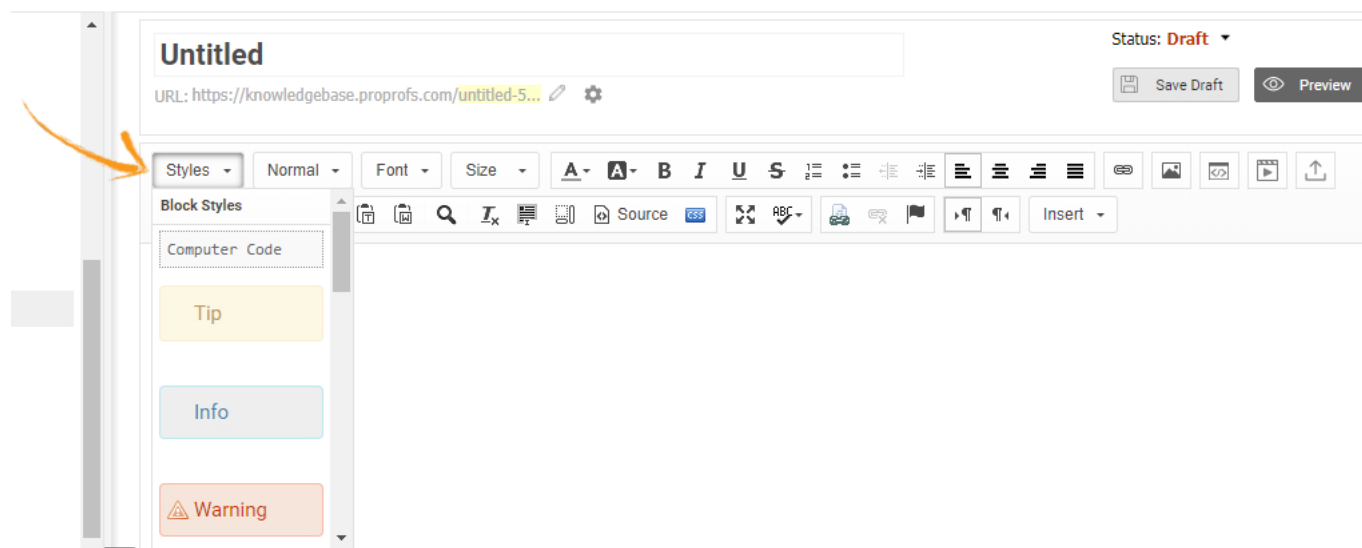
Let's understand all the options available in the Editor from left to right, starting with the first row:

- [Formatting Styles](#)
- [Paragraph Format](#)
- [Font Style](#)
- [Font Size](#)

- [Text Color, Background Color, and Text Orientation](#)
- [Numbering, Bullets, and Text Alignment](#)
- [Link, Add Image, Upload Files, and Embed Video](#)
- [Undo, Redo, Copy, Paste, and Find](#)
- [Remove Format](#)
- [Select All](#)
- [Show Blocks](#)
- [Source](#)
- [CSS](#)
- [Maximize](#)
- [Spell-check](#)
- [Link Topic](#)
- [Unlink](#)
- [Anchor](#)
- [Text direction from left to right](#)
- [Text direction from right to left](#)
- [Insert](#)

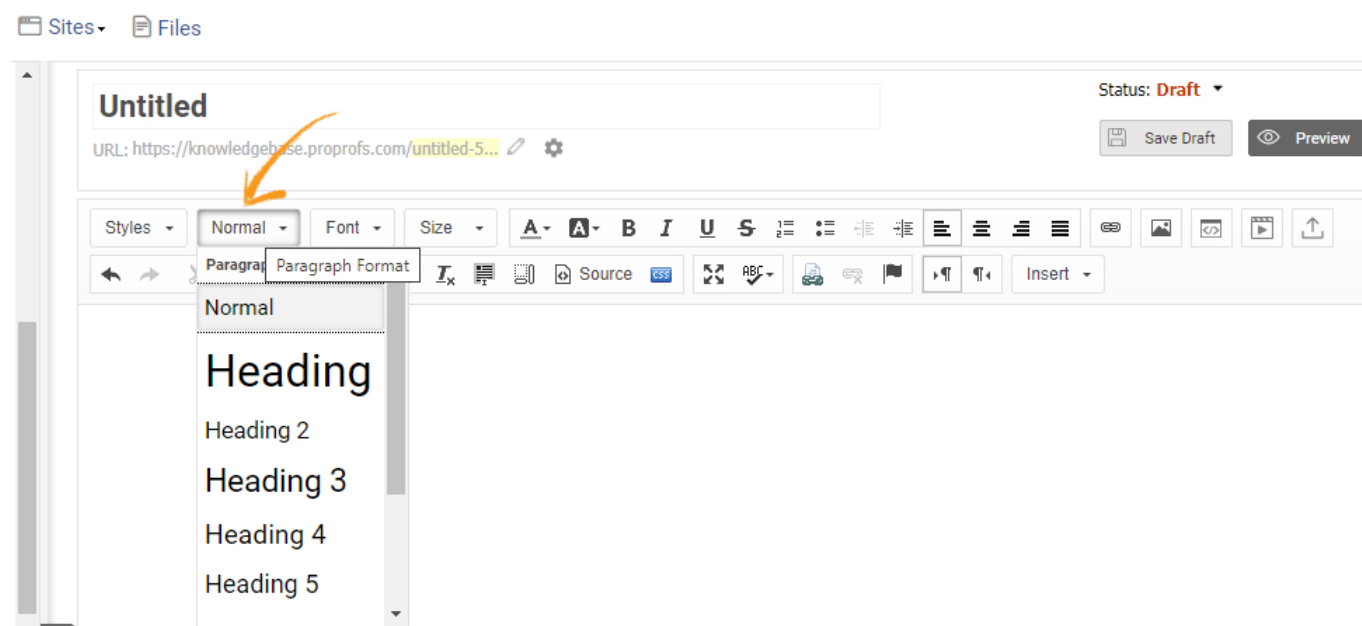
## Formatting Styles

The first option is the **Styles** dropdown. It offers various formatting styles for the textual content. For example, you want a certain text to appear in a box with a gray background? Styles dropdown gives you that option. Depending on your requirement, different formatting styles can be used to customize the look and feel of the text.



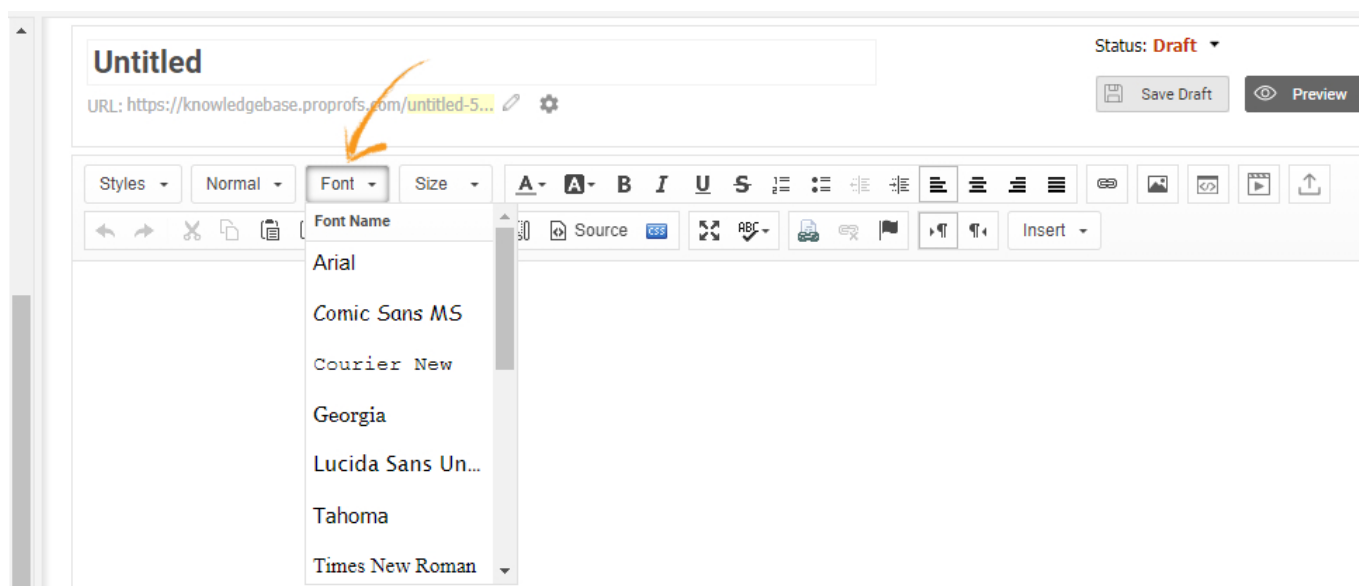
## Paragraph Format

The **Paragraph Format** dropdown, as pointed in the screenshot below, allows you to create the main title and sub-titles depending on an article. It helps you in the segregation of various sections in an article.



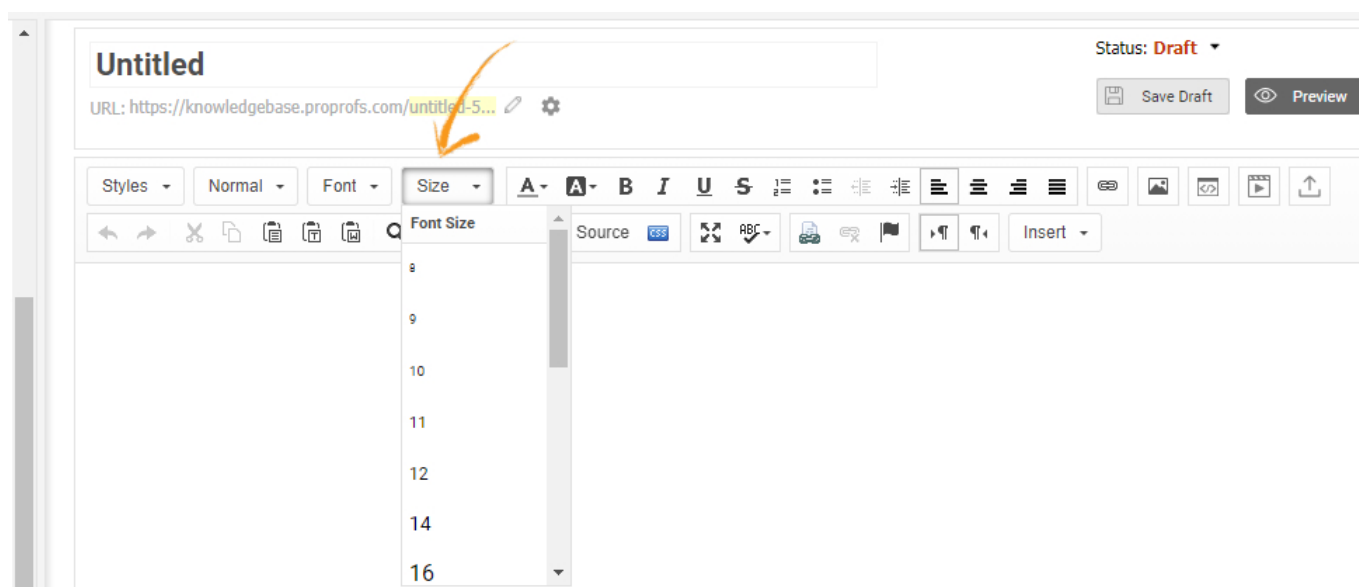
## Font Style

The **Font** dropdown is as simple to use as it looks. It provides a wide range of font styles that you can use to give your articles a unique look and feel.



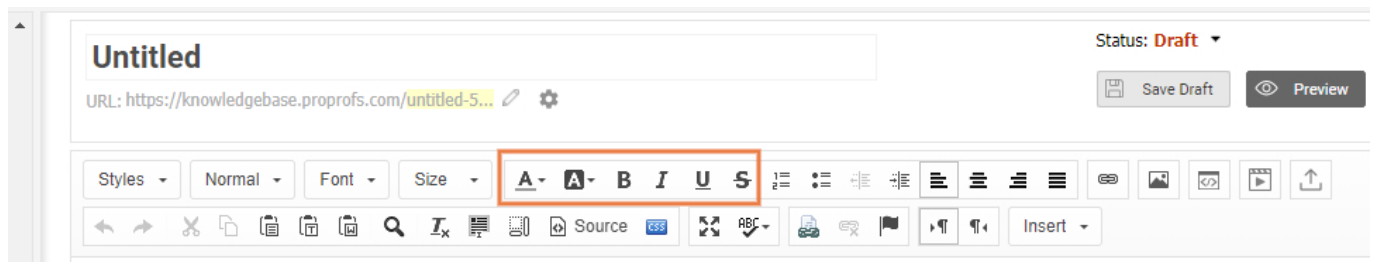
## Font Size

The **Size** dropdown provides various font sizes that you can use to highlight certain text such as titles, subtitles, etc.



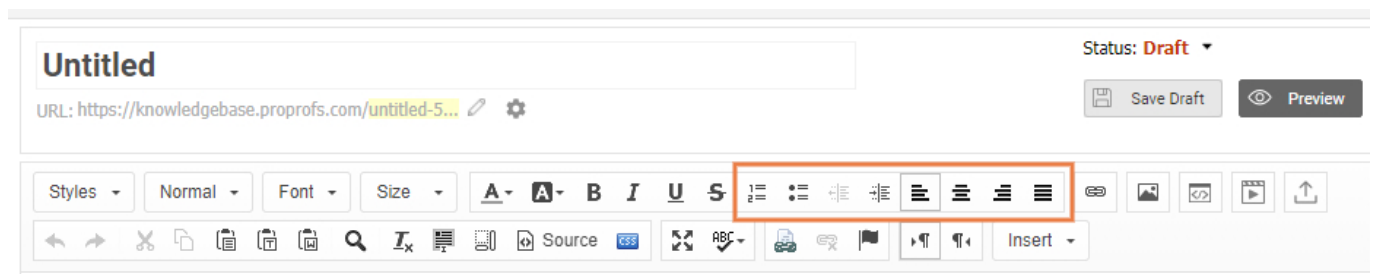
## Text Color, Background Color, and Text Orientation Options

Select from a plethora of choices of **text color** and **background color**. Make the text **bold**, **italic**, **underline it**, or **strike it through**. Combined with other text-related editing options, these options allow you to customize the text in your articles the way you want.



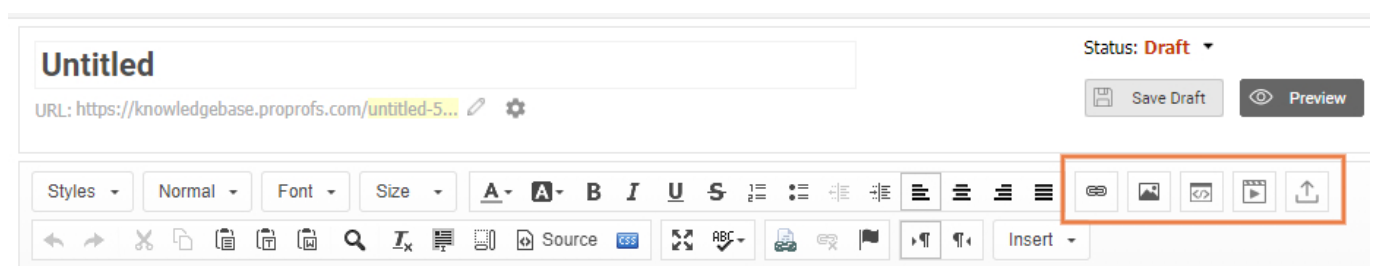
## Numbering, Bullets, and Text Alignment

The **numbering** and **bullet** options give you the freedom to create points that could be important to highlight certain content in an article. While you can use the numbering option to write a step by step process, use the bullet option to simply highlight important points in no particular order. Alignment options further enable you to arrange the text to the left, center, or right on a page.



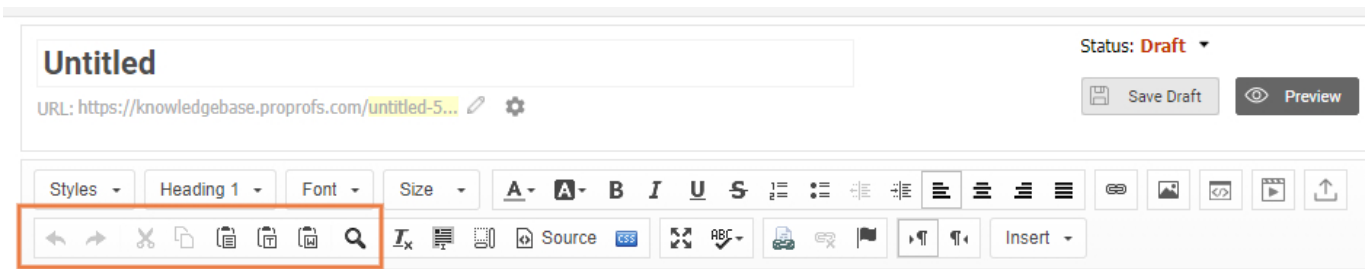
## Add Link, Add Image, Upload Files, and Embed Video

You can link text to another ProProfs help article, a product page on a ProProfs website, or even to a non-ProProfs webpage, depending on your requirement. **Upload images, videos, embed YouTube videos and upload files (DOC, DOCX, PDF, PPT, PPTX, XLS, XLSX, XLTX, DOTX, XLSM).**



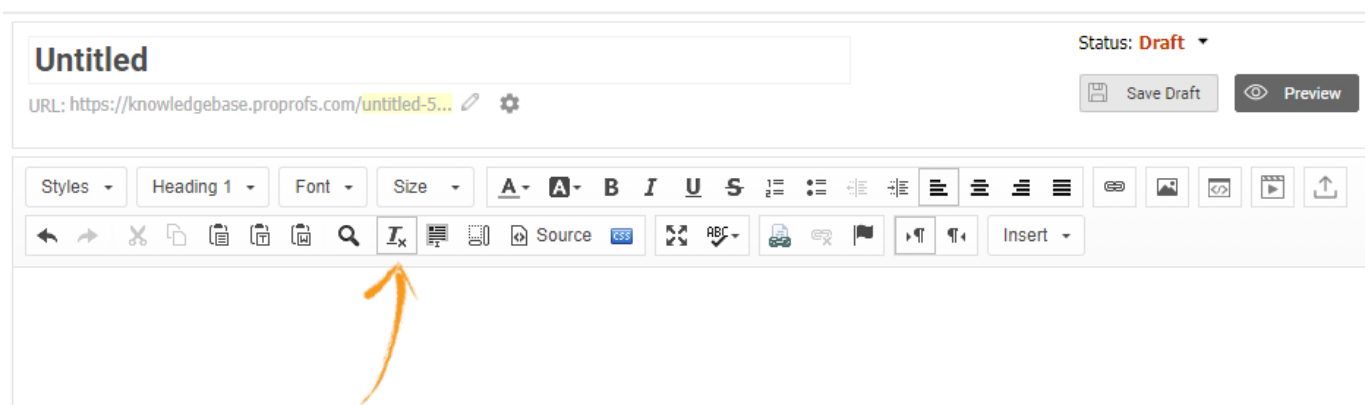
## Undo, Redo, Copy, Paste, and Find

You also get separate options to paste as **plain text** and **paste from MS Word** (which would retain the formatting of the copied text from MS Word). The **Find** option works as intended - you can search for any piece of text within that particular article.



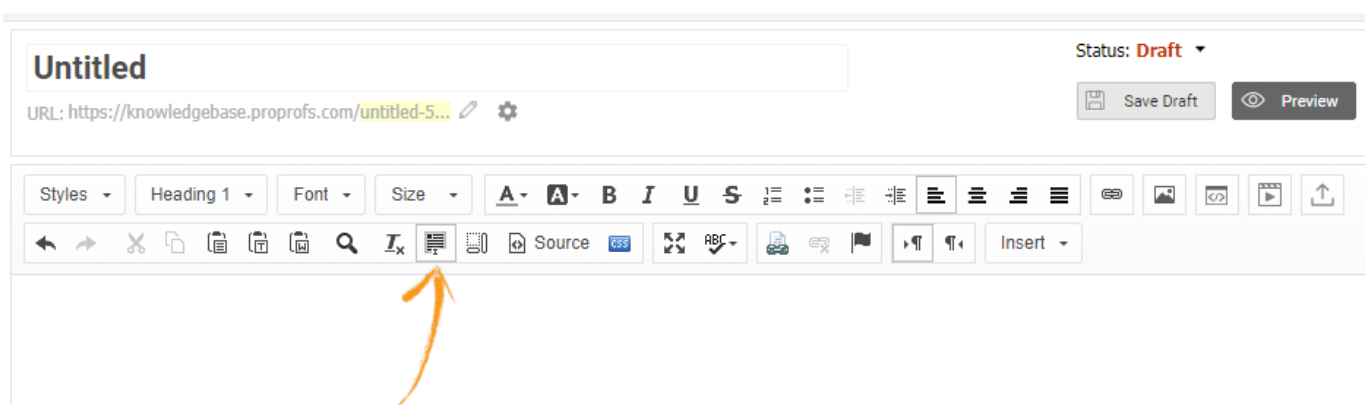
## Remove Format

Remove all kinds of text formatting, such as bold, italic, underline, and strikethrough, in a single click by using the **Remove Format** option. This option is helpful especially when you want to use it on a large amount of text. Just select the text and hit the **Remove Format** button to get rid of the aforementioned formatting.

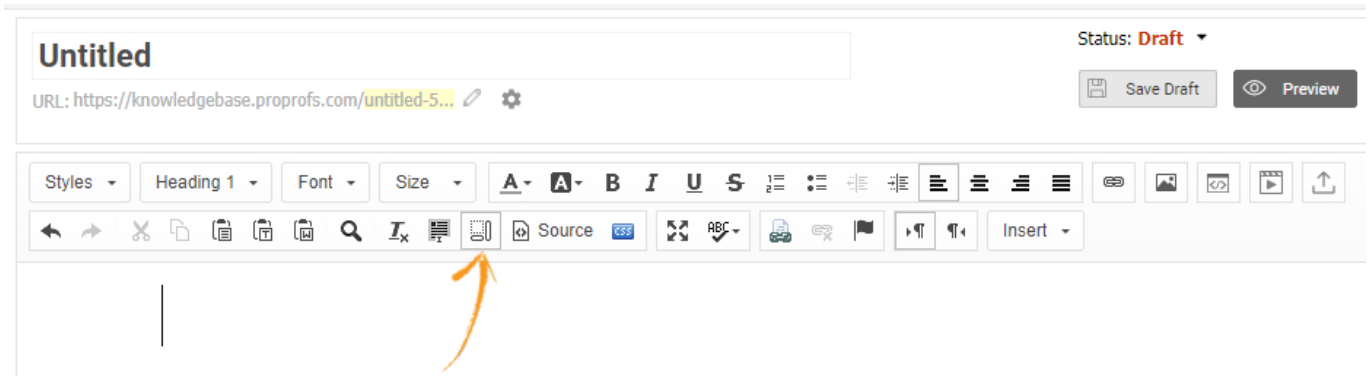


## Select All

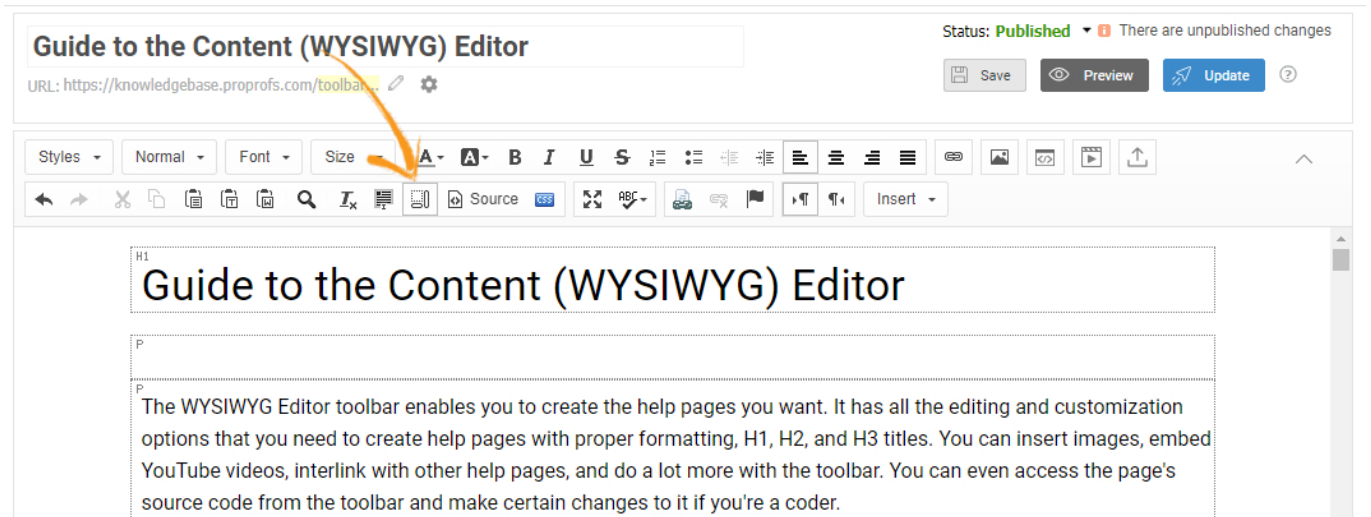
Select the entire content on a page by clicking the **Select All** button. Alternatively, you can also use **CTRL + A**.



## Show Blocks



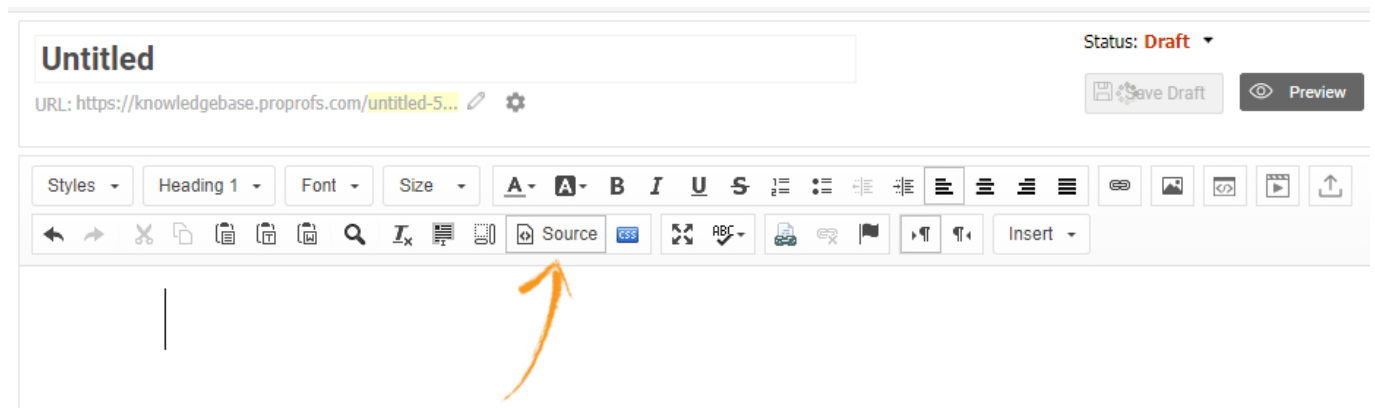
The **Show Blocks** option displays the entire text inside different blocks according to their text type. For example, the H1 title is displayed inside a box labeled H1, normal text is displayed inside a box labeled P (paragraph), and so on. Just click on the **Show Blocks** button to see the text inside the blocks. To remove the blocks, click on the **Show Blocks** button again. The screenshot below shows all the text inside different blocks depending on the text-type (H1, P, etc.).



## Source

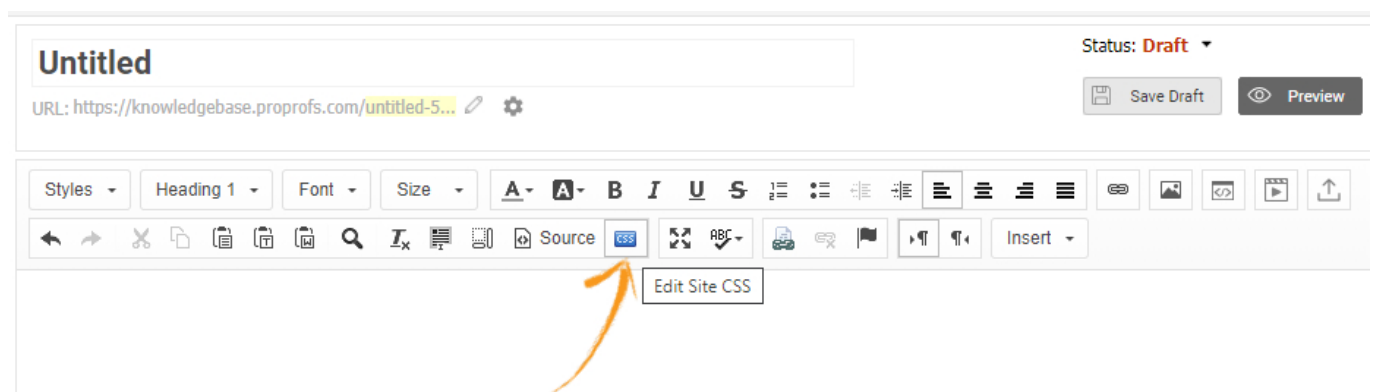
The WYSIWYG editor is simple and easy to use. It provides you with all the options and settings to create nice and impactful help articles exactly the way you want them. You do not need to know any coding for any kind of customization with this editor. However, if you want, you can still access a page's HTML code by clicking on the **Source** button.



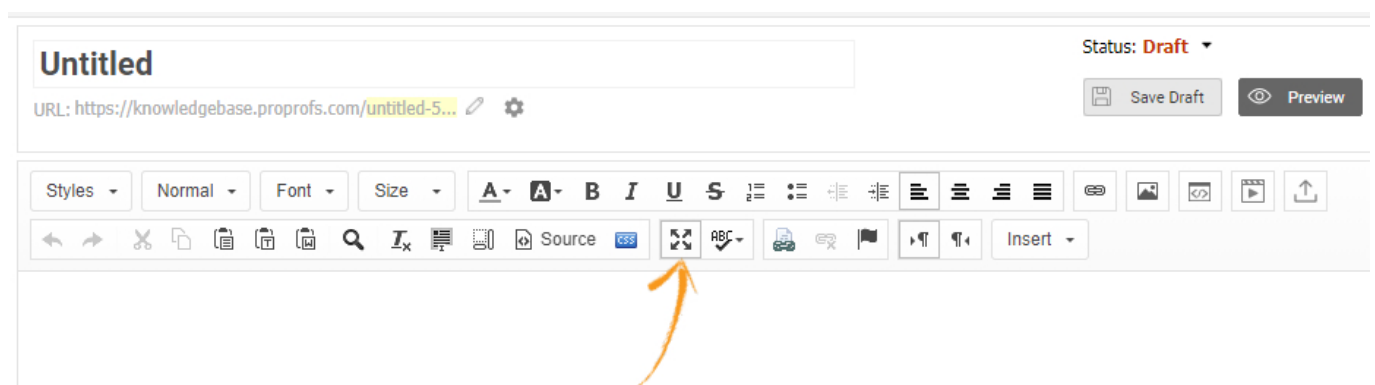


## CSS

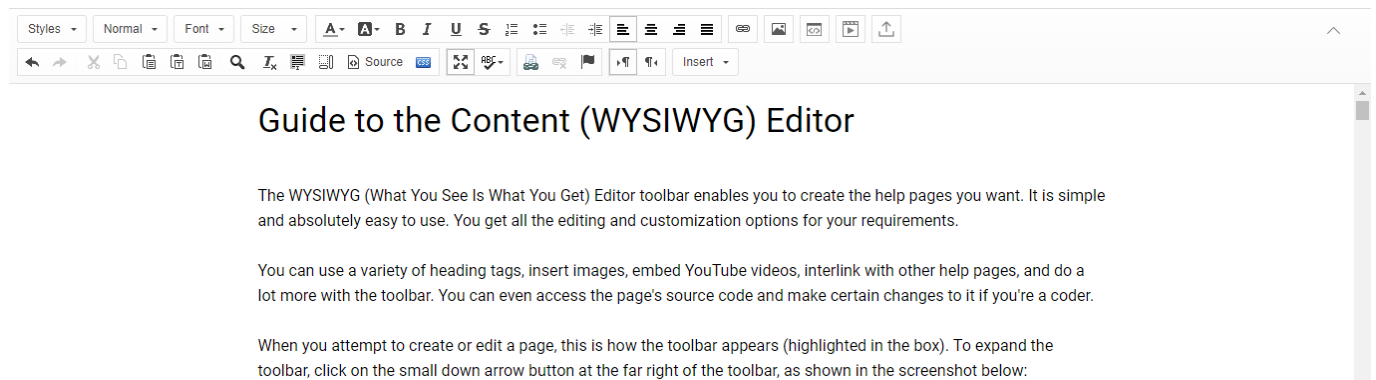
**CSS (Cascading Style Sheets)** gives you the freedom to customize the text beyond the options available in the WYSIWYG editor toolbar. Some of the things that CSS allows you to customize is the background color, font family, font size, max-width, etc. Just click on the **CSS** button to make the changes you want.



## Maximize

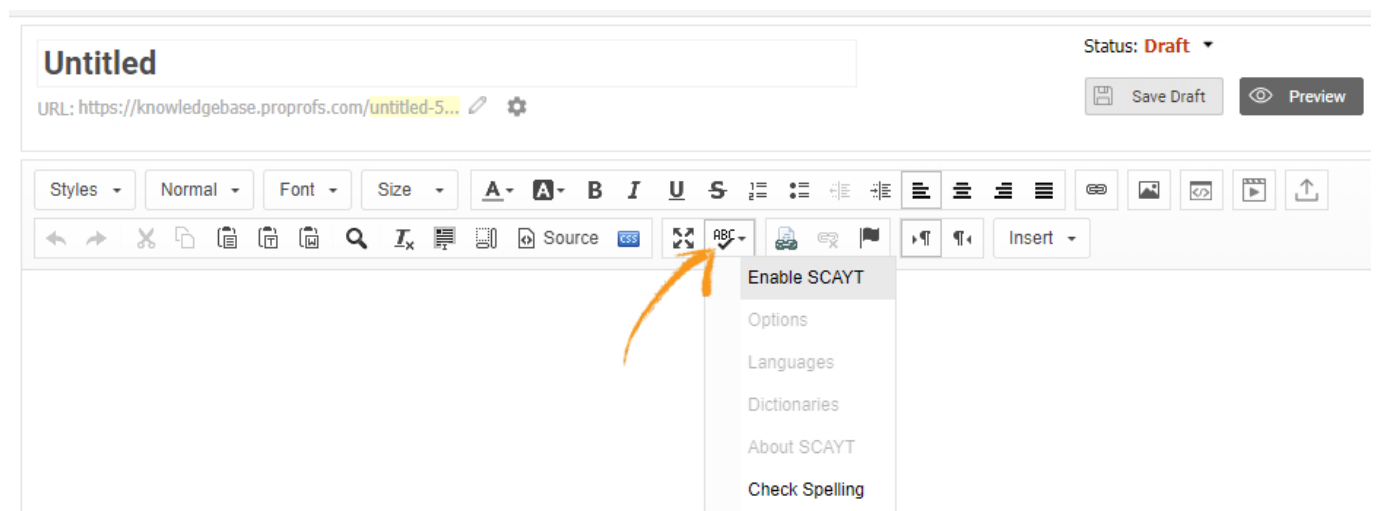


The **Maximize** option expands the page across the entire browser window. You can use this option if you prefer a larger field of view of the page you're working on. When you click on the **Maximize** button, this is how the editing page expands.

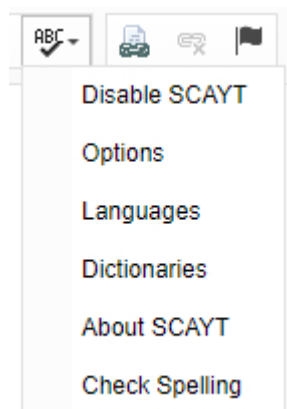


In the screenshot above, you can observe that when the page maximizes, the TOC (table of contents) and the dashboard get hidden. To bring back the default view, click on the **Maximize** button again.

## Spell Check



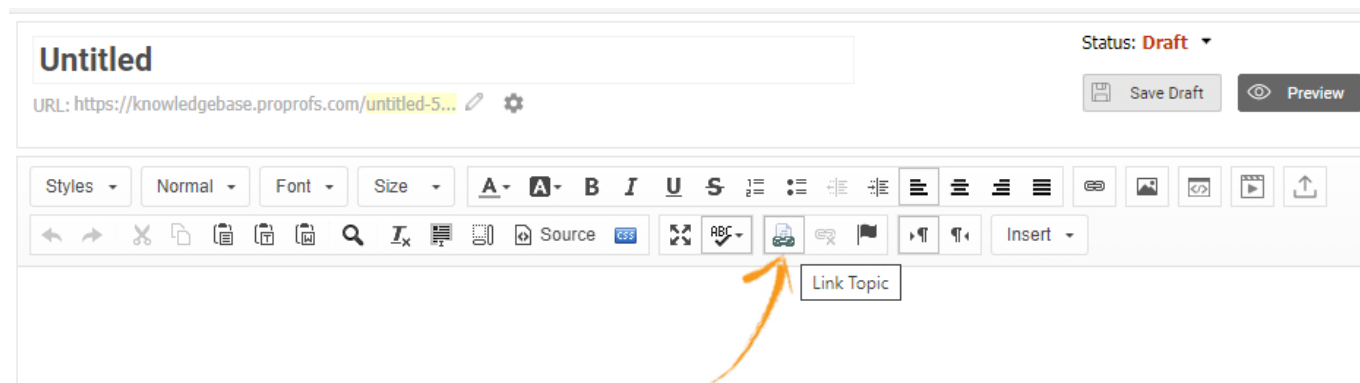
Enable spell-check using this option. When you click on the **ABC** button, you get an option to **Enable SCAYT** (Spell-Check As You Type) that checks the spellings as you type. Once SCAYT is enabled, you can then access the **Options**, **Languages**, **Dictionaries**, and **About SCAYT**.



The **Options** lets you choose what text you want to include/exclude from spell-checking such as

domain names, words in upper cases, etc. The **language** option lets you choose what language this editor should follow. And if you want, you can add frequently used words in the **dictionary** that might be unique to your content requirement, so that the spell-check recognizes them as correct words. **About** simply tells the version of the spell checker.

## Link Topic



The **Link Topic** option enables you to link to another ProProfs help site/page. Click on **Link Topic** and you'll get the following pop-up window where you can select a ProProfs page you want to link to. Just click on a page from the list and save. The selected page will appear as a link on the current page (where your cursor is).

## Sync Page

{link\_to}  
{page}

☐ Show TOC
 ☐ Show only published pages

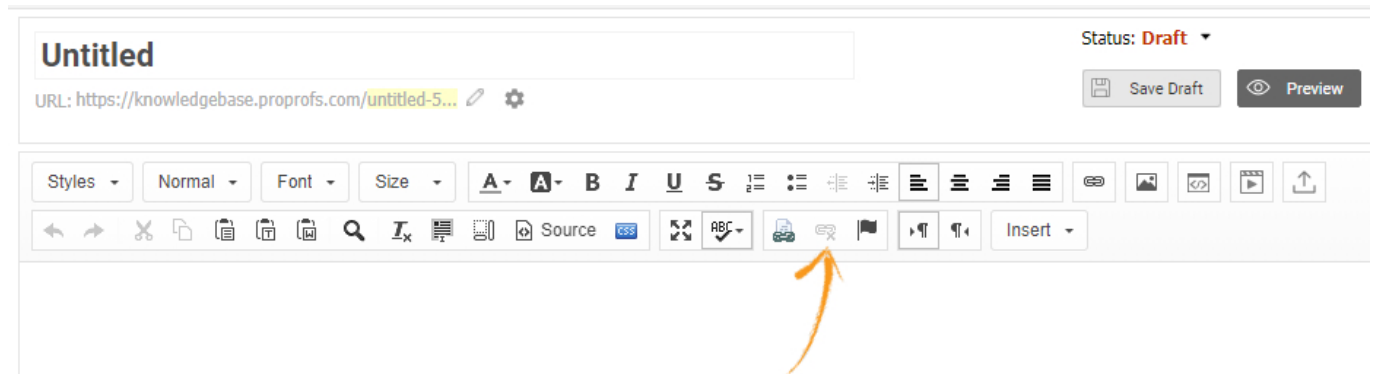
Page Title	Status	Last Modified	Author
<a href="#">Guide to the Content (WYSIWYG) Editor</a>	Unpublished changes	Oct 07, 2020	
<a href="#">Untitled</a>	Draft	Oct 07, 2020	
<a href="#">Submit A Ticket</a>	Published	Oct 06, 2020	
<a href="#">Supported File Types</a>	Published	Sep 25, 2020	
<a href="#">View Pages</a>	Published	Sep 25, 2020	
<a href="#">Videos</a>	Published	Sep 24, 2020	
<a href="#">Create Multi Branding Help Site</a>	Published	Sep 22, 2020	
<a href="#">Links</a>	Published	Sep 21, 2020	
<a href="#">How to Add, Edit, and Delete a User</a>	Published	Sep 21, 2020	
<a href="#">How to Create a Knowledge Base</a>	Published	Sep 18, 2020	
<a href="#">Create a new Help Site</a>	Published	Sep 18, 2020	
<a href="#">Add Content Snippets</a>	Published	Sep 17, 2020	
<a href="#">Create a Tooltip</a>	Published	Sep 17, 2020	
<a href="#">Add a Sync Page</a>	Published	Sep 17, 2020	
<a href="#">Add, Copy and Delete a Folder</a>	Published	Sep 17, 2020	

Page 1 of 7

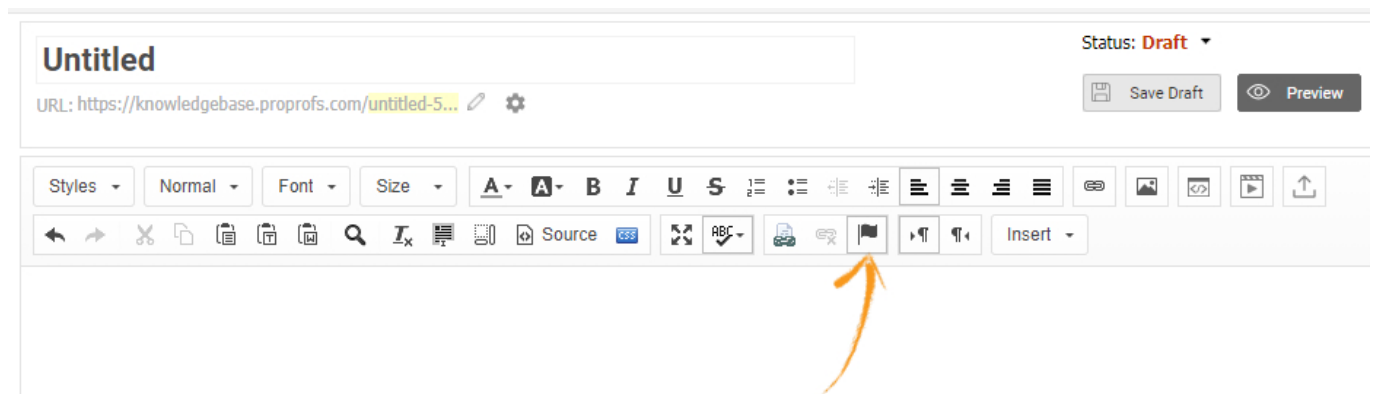
Displaying items 1 - 25 of 166

## Unlink

The **Unlink** option is used to remove the link that you created using the **Link Topic** option. To do that, just select that linked text and hit **Unlink**.



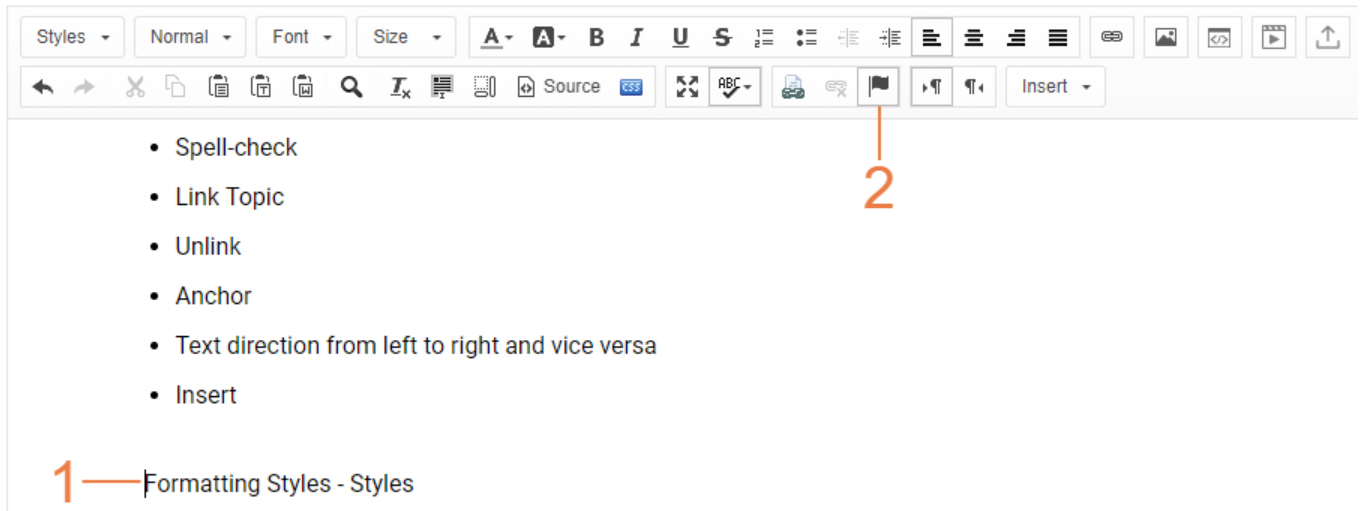
## Anchor



With the **Anchor** option, you can create a link to a different text in the same article. For example, you have bullet points that you've elaborated below, under respective subtitles, in an article. You can put an anchor at each subtitle and connect it to its corresponding bullet point. Once done, clicking on a bullet point will take you directly to that subtitle. It's like a quick scroll. The Anchor option is really useful in long articles as it minimizes manual scrolling and makes navigation easy.

**To create an anchor, follow the steps below:**

1. Place the cursor right before the text that you want to link to.
2. Click **Anchor**.

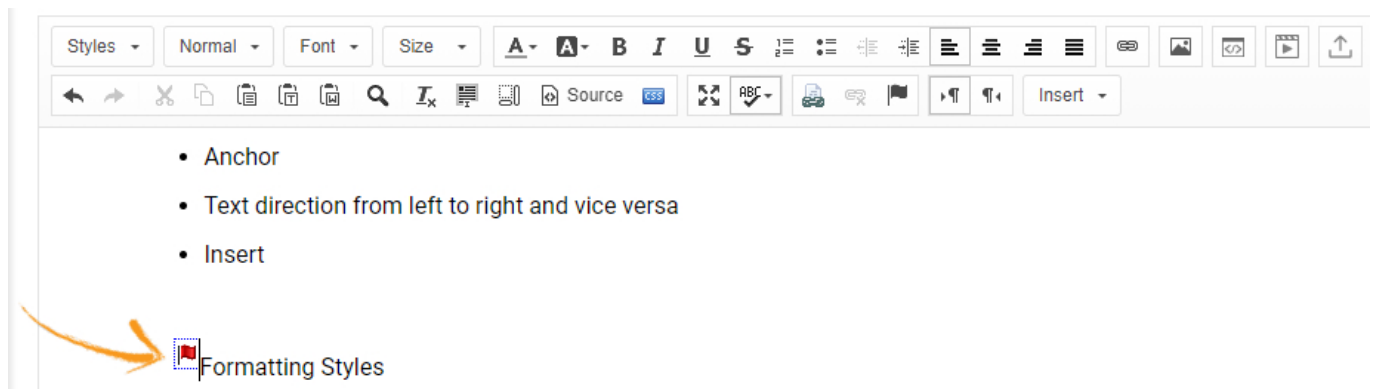


3. Enter a name for the anchor in the small pop-up window that opens.

**Anchor Properties** ✕

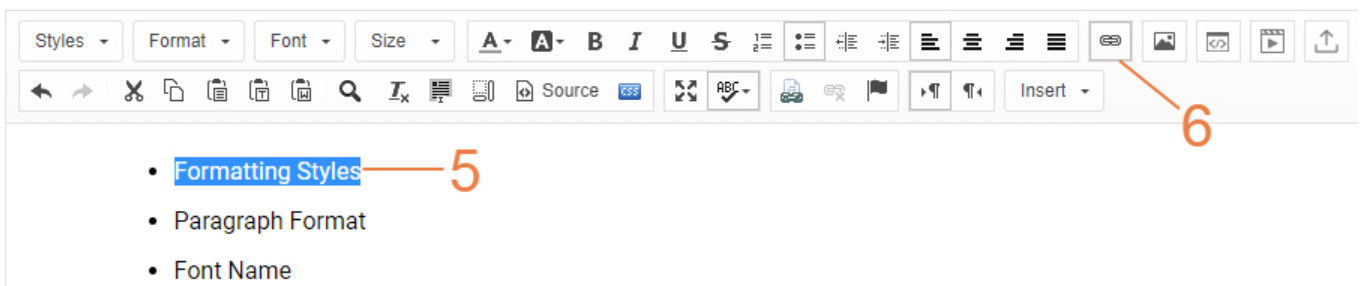
Anchor Name

4. When the anchor is successfully put, it is prefixed to that particular piece of text, as shown below.



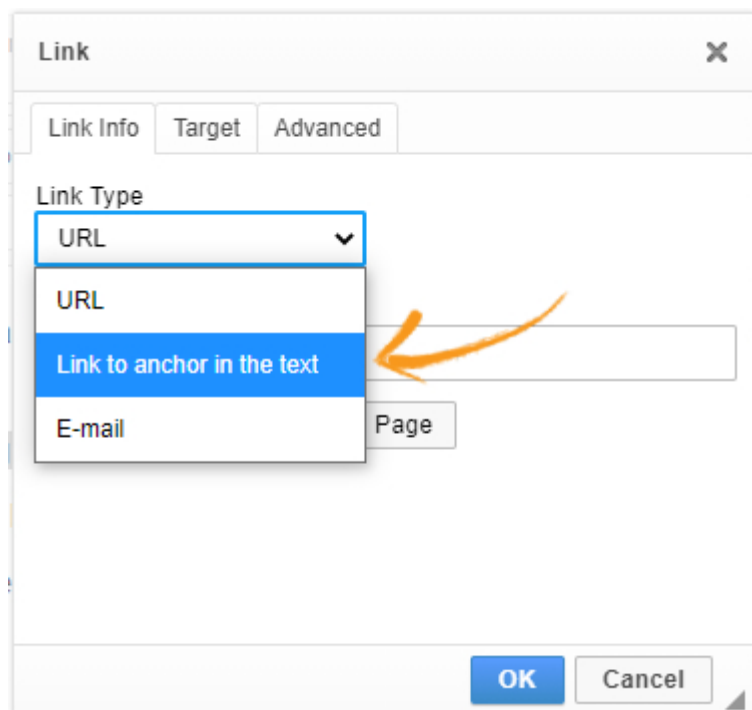
5. Now select the text that you want to link to the anchor.

6. Click the **Link** button.

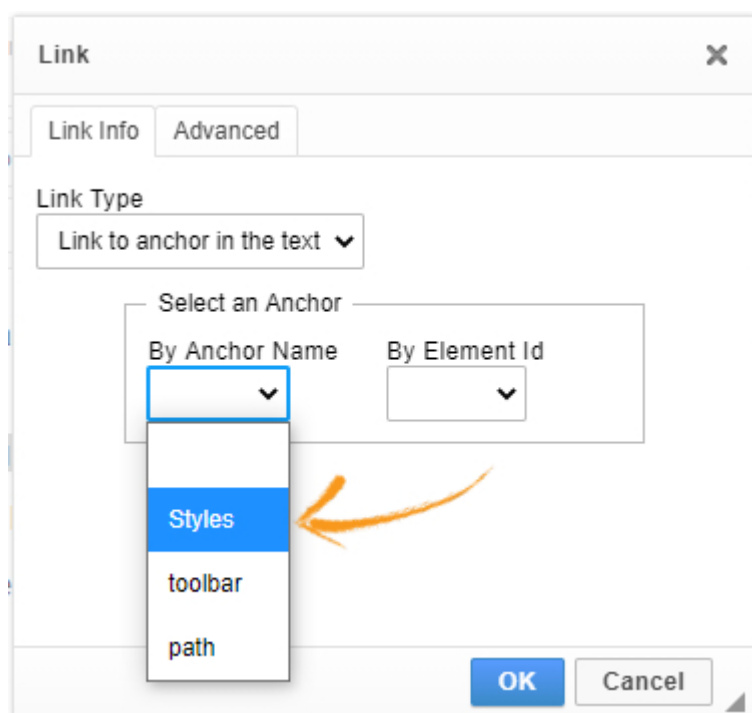


7. When the pop-up window opens, click on the **Link Type** dropdown and select the option **Link**

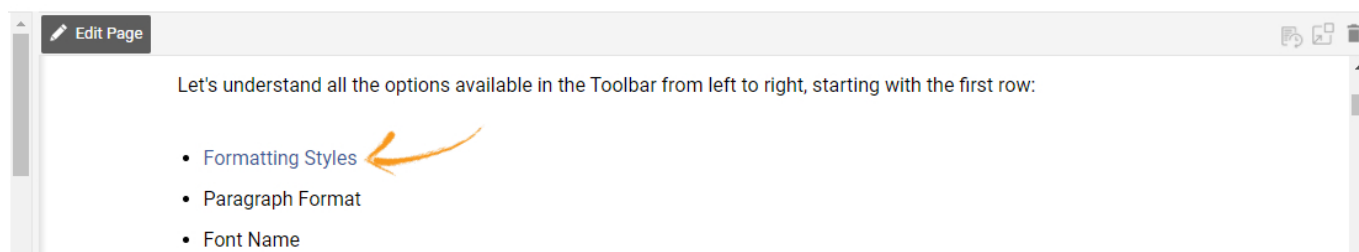
to anchor in the text.



8. Click on the **By Anchor Name** dropdown, select the correct Anchor name, and hit **OK**.

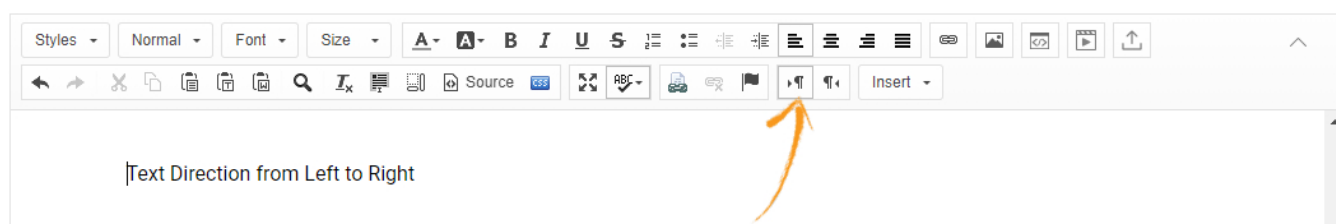


**Save** your page and **reload** it. The anchor is now ready to use. Taking the current example, clicking on the **Format Styles** link will automatically scroll to its corresponding anchor. You can create an anchor between any two text pieces.



## Text Direction from Left to Right

In the screenshot below, the highlighted button keeps the direction of the flow of the text from left to right. This is the default setting.



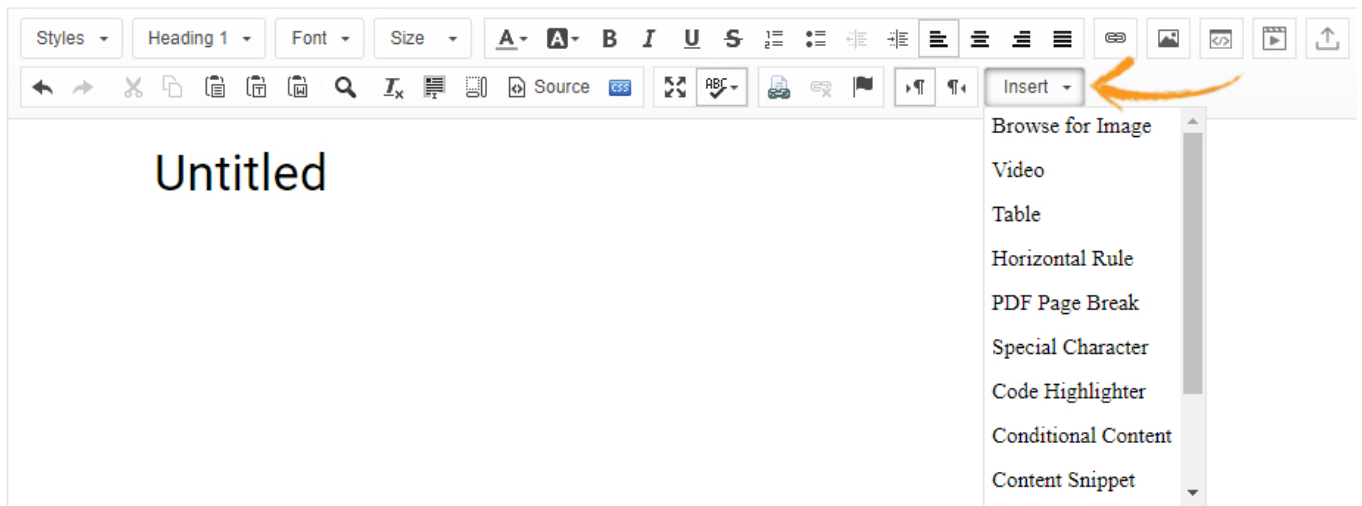
## Text Direction from Right to Left

This button switches the flow of the text and progresses it from right to left. As shown in the below screenshot, the text "Text direction from left to right" has been shifted towards the right side of the page. While you'll continue to type normally, the text flow will be from right to left.



## Insert

Use the **Insert** option to add images, videos, tables, PDF page break, and many more. For example, the **Insert** option provides you settings to edit the dimensions of an image while uploading.



#### Related Articles:

[File & Image Manager](#)

[How to Add and Publish a Page](#)

[Home Page](#)



# Supported File Types

Please keep your images, documents, videos, and folders in the following file formats, so that they are accessible on multiple devices.

**Images:** We support the following image formats - PNG, JPG, JPEG, BMP, with file sizes up to 4 MB.

**Documents:** We support the following document formats - DOCX, DOC, PDF, XLS, XSLX, PPT, PPTX, CSV, TXT, with file sizes up to 15 MB.

**Videos:** We support videos in the MP4 format with file sizes up to 15 MB. Videos can also be inserted by embedding. If you want to upload a video larger than 15 MB, you can upload it from the file manager.

**Folders:** We support the folder formats ZIP and TAR with file sizes up to 70 MB. Also, you can upload a file of any extension if it's inside a ZIP folder.

# How to Access Revision History

ProProfs Knowledge Base collects and stores the page edits on the cloud to let you monitor a page's history. The feature allows you to track changes on the page level and restore previous versions if necessary.

**Note:** Revision History saves backup copies each time you save a draft page or publish a page. ProProfs will store the last 30 revisions of each page.

## Benefits of Accessing a Page's Revision History:

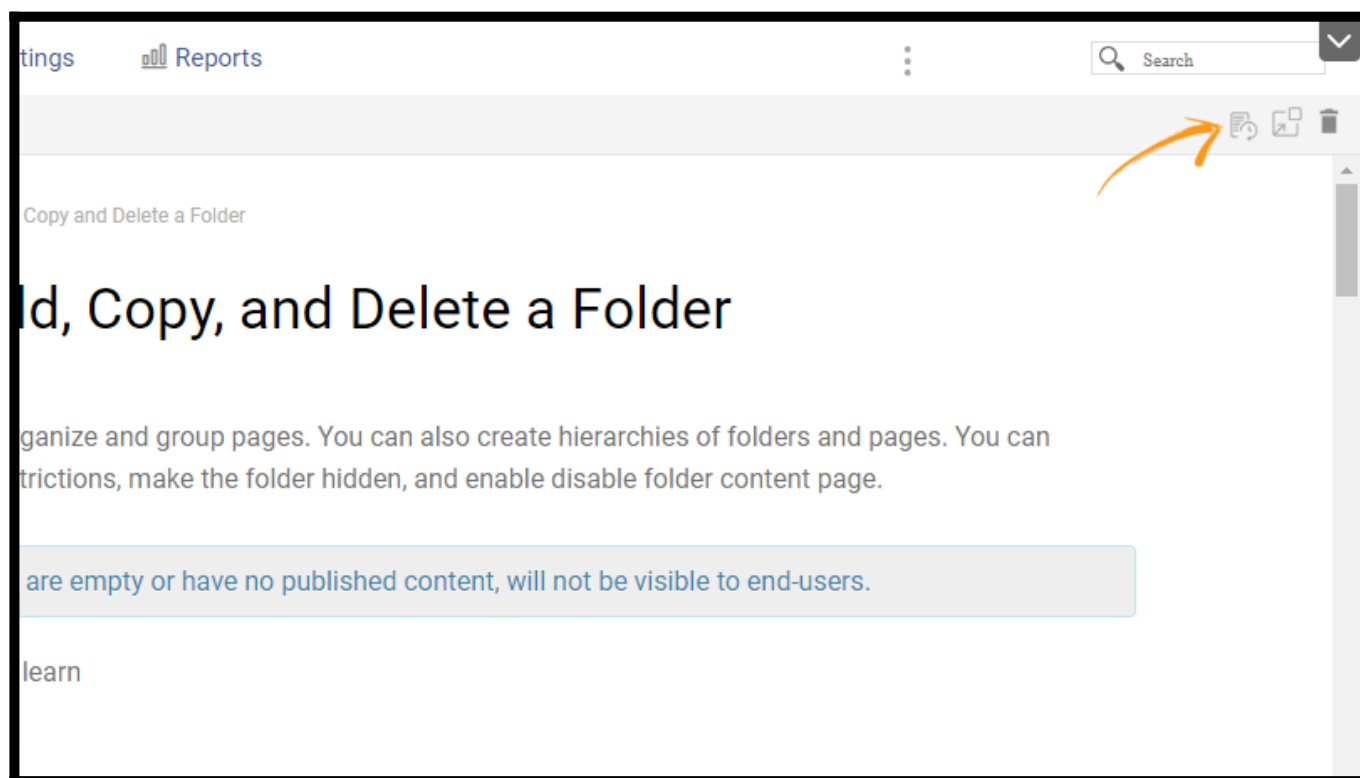
- See all previous versions of a page along with their respective dates and time of the creation
- Restore any earlier version of a page
- See the difference in the content of any two versions of a page
- Comment on any version of a page

Here's a preview of the revision history of a page:

The system will save a maximum of 30			
Revision History   <a href="#">Show Workflow History</a>			
<a href="#">Show differences</a>			
Date	Type	Author	Action
<input type="checkbox"/> Jul 12, 2022 03:36:45 AM	Draft		Working draft
<input type="checkbox"/> Jul 07, 2022 01:35:49 AM	Published		Current published version
<input type="checkbox"/> Jul 01, 2022 01:26:51 AM	Published		<a href="#">Restore this version</a>
<input type="checkbox"/> Jun 08, 2022 08:42:33 PM	Published		<a href="#">Restore this version</a>
<input type="checkbox"/> Sep 17, 2020 05:41:32 AM	Published		<a href="#">Restore this version</a>
<input type="checkbox"/> Aug 07, 2020 12:42:25 AM	Published		<a href="#">Restore this version</a>
<input type="checkbox"/> Aug 07, 2020 12:39:33 AM	Published		<a href="#">Restore this version</a>
<input type="checkbox"/> Aug 07, 2020 12:38:12 AM	Published		<a href="#">Restore this version</a>
<input type="checkbox"/> Aug 07, 2020 12:36:51 AM	Published		<a href="#">Restore this version</a>

## How to Access Revision History

**Step 1:** Select the **required page** from the **table of content** and click the **Revision History** icon on the far right, as shown in the screenshot below.



**Step 2:** As you arrive under the **Revision History** tab, you can see the **current published** and **previous** versions that you can restore. You can also see the **differences** between any two versions of the page.

The system will save a maximum of 30

Revision History | Show Workflow History

Show differences 4

Date	Type	Author	Action
<input type="checkbox"/> Jul 12, 2022 03:36:45 AM	Draft 3		Working draft
<input type="checkbox"/> Jul 07, 2022 01:35:49 AM	Published		1 Current published version
<input type="checkbox"/> Jul 01, 2022 01:26:51 AM	Published		2 Restore this version
<input type="checkbox"/> Jun 08, 2022 08:42:33 PM	Published		Restore this version
<input type="checkbox"/> Sep 17, 2020 05:41:32 AM	Published		Restore this version
<input type="checkbox"/> Aug 07, 2020 12:42:25 AM	Published		Restore this version
<input type="checkbox"/> Aug 07, 2020 12:39:33 AM	Published		5 Restore this version
<input type="checkbox"/> Aug 07, 2020 12:38:12 AM	Published		Restore this version
<input type="checkbox"/> Aug 07, 2020 12:36:51 AM	Published		Restore this version

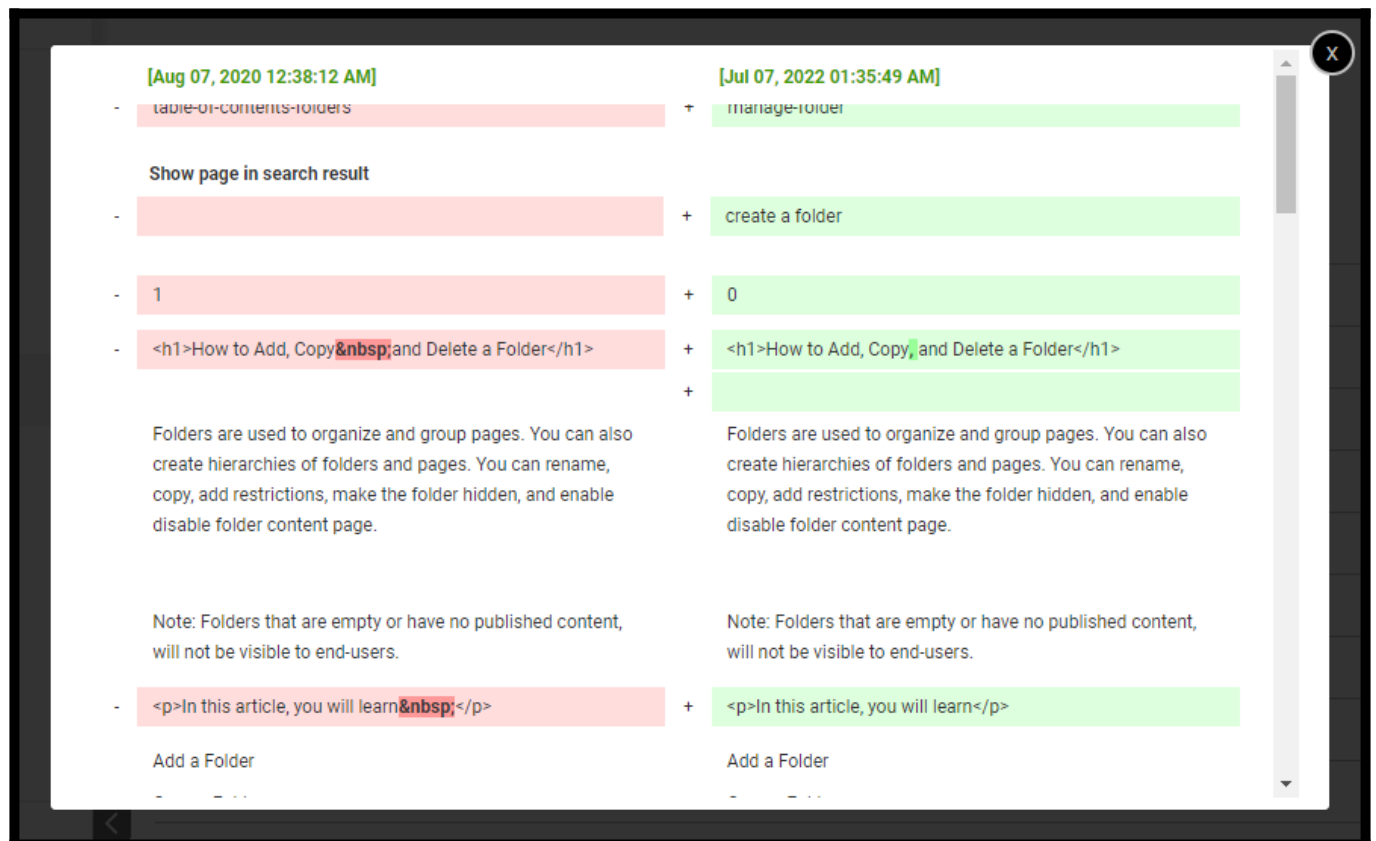
**1. Current published version** - This is the version of the page that is currently published and visible to anyone who searches for this particular page.

**2. Restore this version** - Clicking this option restores that version over the published one. You

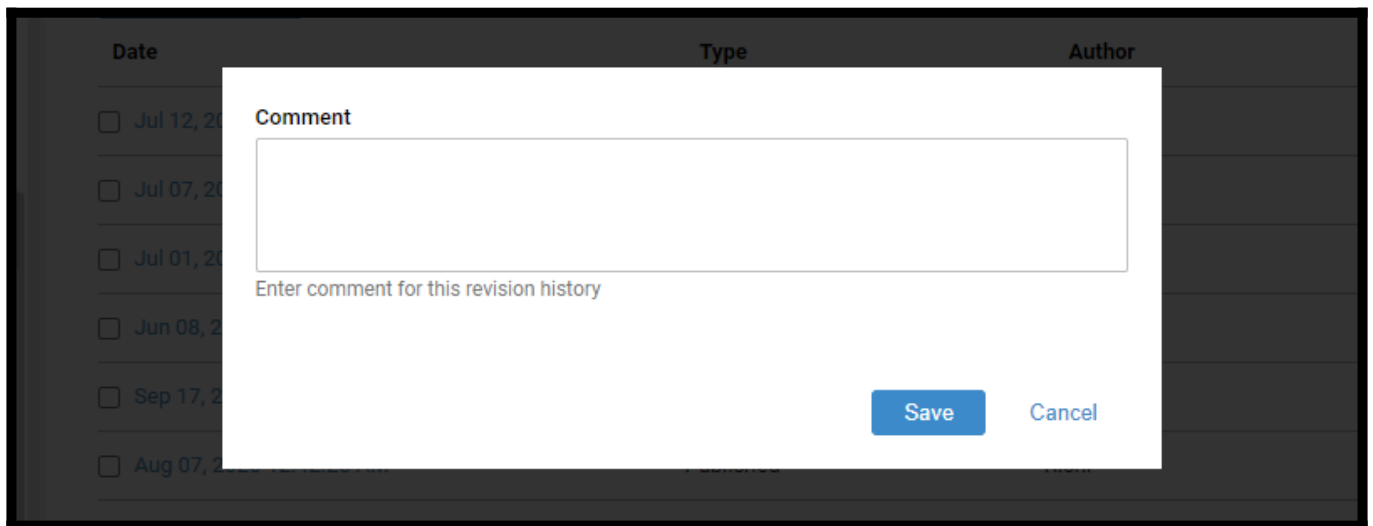
can then continue to edit its content.

**3. Draft** - Shows the version that was in draft between the currently published and previously published versions.

**4. Show Differences** - You can select any two versions of the page and click Show Differences to view their differences. The screenshot below shows how the differences between page versions are presented. You can also see the date and time of each version.



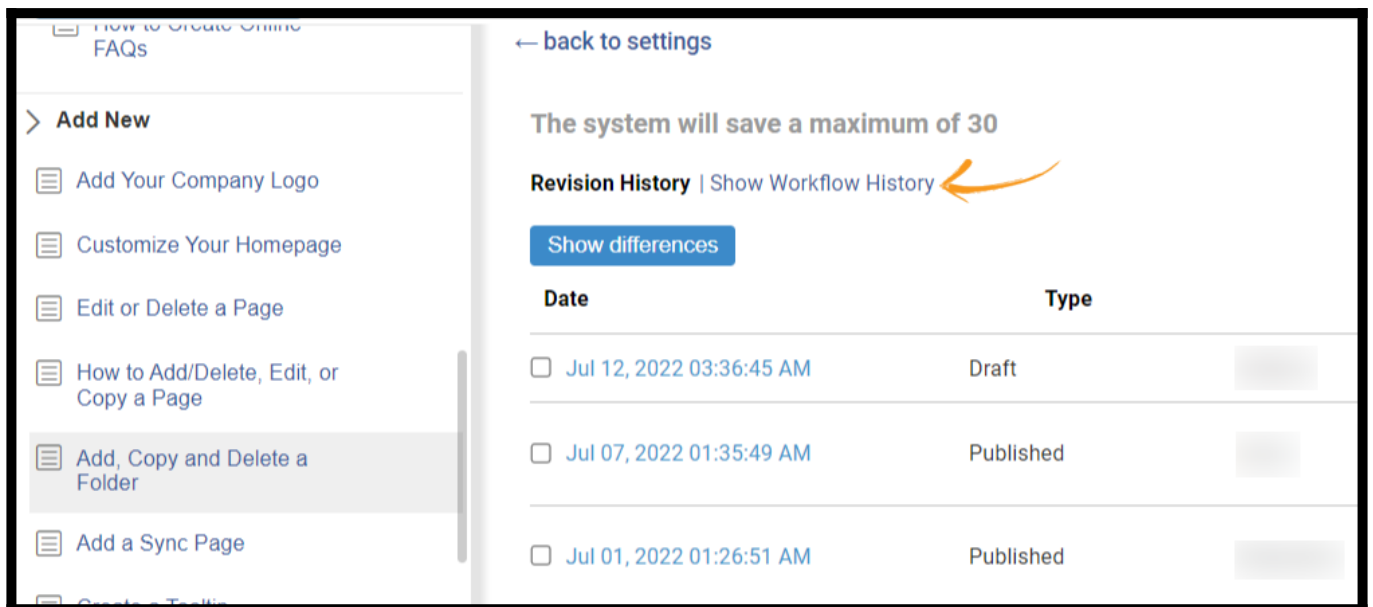
**5. Comment** - Comment on a page version by clicking the **comment icon**. The comment box appears as shown in the screenshot below. Enter your comment in the comment text box and **save**.



The screenshot shows a modal window titled "Comment" with a text input field and "Save" and "Cancel" buttons. The background is a dimmed table with columns "Date", "Type", and "Author".

Date	Type	Author
<input type="checkbox"/> Jul 12, 2022		
<input type="checkbox"/> Jul 07, 2022		
<input type="checkbox"/> Jul 01, 2022		
<input type="checkbox"/> Jun 08, 2022		
<input type="checkbox"/> Sep 17, 2021		
<input type="checkbox"/> Aug 07, 2021		

**Step 2.1:** You can also access the workflow history to see the details about modifications in a page's status. Click **Show Workflow History**.



The screenshot shows the "Revision History" section with a "Show Workflow History" link highlighted by an orange arrow. Below the link is a "Show differences" button. The table below shows the revision history.

Date	Type
<input type="checkbox"/> Jul 12, 2022 03:36:45 AM	Draft
<input type="checkbox"/> Jul 07, 2022 01:35:49 AM	Published
<input type="checkbox"/> Jul 01, 2022 01:26:51 AM	Published

*That is all about accessing a page's revision history in your knowledge Base.*

### Related Articles:

- [View All Pages](#)
- [How to Create a Tooltip](#)
- [How to Add, Copy, and Delete a Folder](#)

# Page Restrictions

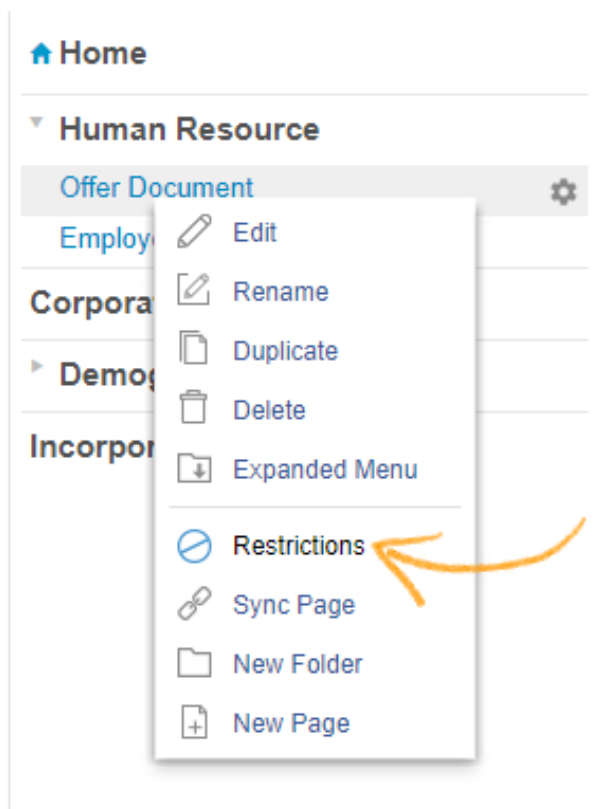
You can add conditions at the page level and choose to display or hide certain pages from your customers or employees, in your help-site.

- **Grant editing access to only authorized employees** - You can create your own conditions to allow only authorized content-managers to edit the page, while hiding it from other employees and stakeholders.
- **Show or hide pages from customers or partners** - Likewise, you can choose to show the page to only select customers or partners while hiding it from others.
- [How to restrict viewing to users](#)
- [How to restrict editing to users](#)
- [Device Viewing](#)
- [Site Language](#)
- [URL Parameter](#)
- [SSO Parameter](#)
- [User Roles](#)
- [Created On](#)
- [Last Modified](#)
- [Edit/Delete Page Restrictions](#)

---

## How to restrict viewing to users

1. Locate the page, Right click on the page name to open the pop-up menu, then click "Restrictions".



2. Under "Page Restrictions", select the users to restrict page viewing for them.

#### Page Restrictions

Editors ?  
Select user(s) ▼

Viewers ?  
| ▼

John Doe  
Clara Johnson  
Mike Doe  
Jessica Goldman

Enter your own rules using the logic builder ☒ Apply a rule set ☐ select rule set ▼

If Any ▼ of the following match:

Select Condition ▼

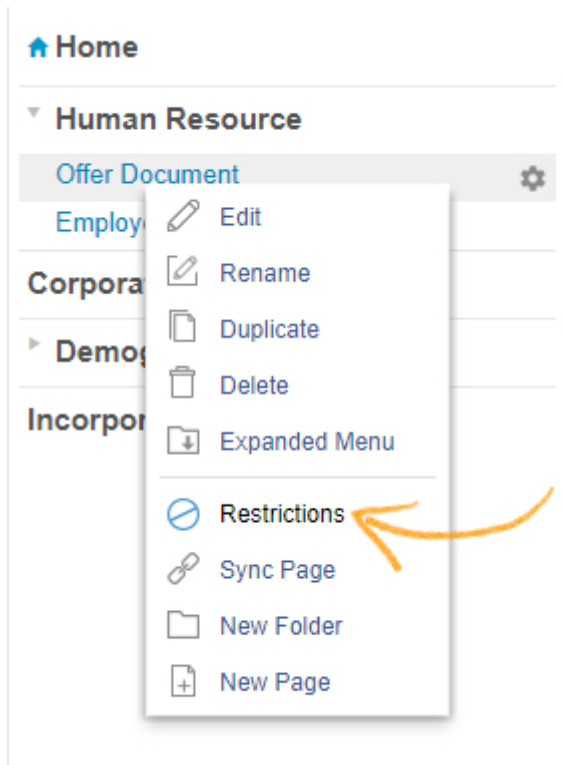
Then Hide the page ▼

Save Close

Add condition - +

#### How to restrict editing to users

1. Locate the page, Right click on the page name to open the pop-up menu, then click "Restrictions".



2. Under "Page Restrictions", from the "Editors" drop down menu select the users to restrict editing for them.

#### Page Restrictions

Editors ?

▼ →

- John Doe
- Clara Johnson
- Mike Doe
- Jessica Goldman

☒ **Show or hide based on conditional logic**

For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set ▼

If Any ▼ of the following match:

Select Condition ▼

Then Hide the page ▼

+  
Add condition +

Save Close

#### Viewing Device

You can restrict users from editing or viewing a page based on the device they are using to access your help site.



- Select the users you want to restrict editing or viewing to and then select “Viewing Device” and choose the device.

## Page Restrictions

**Editors** <sup>?</sup>

Select user(s) ▼

**Viewers** <sup>?</sup>

Jessica Goldman × ▼

☒ **Show or hide based on conditional logic**

For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set ▼

If Any ▼ of the following match:

Viewing Device ▼ is ▼ Desktop ▼

Then Hide the page ▼

Desktop  
Desktop  
Tablet  
Phone

+ Add condition

−

Save Close

## Site Language

You can restrict users from editing or viewing the page based on the language of your help site.

- Select the users you want to restrict editing or viewing to and then select “Site Language” and choose the language.

## Page Restrictions

**Editors** ?  

Select user(s) ▼

**Viewers** ?  

Jessica Goldman × ▼

☒ **Show or hide based on conditional logic**  
For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set 

select rule set ▼

If Any ▼ of the following match:

Site Language ▼ is ▼ Czech - čeština ▼

Then Hide the page ▼

+

Add condition +

−

Save

Close

## URL Parameter

You can use URL parameters to hide or show certain pages in you help site. These parameters help you to determine which content to show to which users. For instance, you can make certain documentation available to only one of you users “X corp” and hide the same documentation from other users.


- Select the users you want to restrict editing or viewing to and then select “URL parameter” to add the parameter.

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## Page Restrictions

### Editors ?


Select user(s) 


### Viewers ?




Jessica Goldman  


### ☒ Show or hide based on conditional logic

For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set 

If Any  of the following match:

URL Parameter  is  corp = yes 

Then Hide the page 

Add condition



Save

Close


## SSO Parameter

Similar to a URL parameter, you can pass an SSO parameter to your help site. When users login to your site, an SSO parameter is instantly sent to ProProfs. Based on it, certain pages in your help site are either shown or hidden from your users.



- Select the users you want to restrict editing or viewing to and then select "SSO parameter" to add the parameter.

## Page Restrictions

### Editors ?

Select user(s) 


### Viewers ?



Jessica Goldman  


### ☒ Show or hide based on conditional logic

For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set 

If Any  of the following match.

SSO Parameter  is  PP\_user = user\_name

Then Hide the page 

Add condition



Save


Close


## User Roles


You can restrict users from editing or viewing the page based on the role of the user.



- Select the users you want to restrict editing or viewing to and then select "User Role" and choose the role of the user.

## Page Restrictions

**Editors** 


Select user(s) 


**Viewers** 




Jessica Goldman  


☒ **Show or hide based on conditional logic**

For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)



☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set 

If Any  of the following match:

User Group  is  Administrator 

Then Hide the page 

Administrator  
Administrator  
Editor  
Contributor  
Viewer (Read-Only)

Add condition


Save Close


## Created On


You can restrict users from editing or viewing the page based on the date on which the page was created. You can set the restriction for the following conditional rules:



- Created on date **is** the specified date
- Created on date **is not** the specified date
- Created on date **is before** the specified date
- Created on date **is after** the specified date

## Page Restrictions

**Editors** 


Select user(s) 


**Viewers** 




Jessica Goldman  


☒ **Show or hide based on conditional logic**

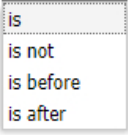
For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)



☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set 

If Any  of the following match:

Created on  is  09/27/2017 

Then Hide the page 



**Add condition**


**Save** **Close**


## Last Modified


You can restrict users from editing or viewing the page based on the date on which the page was last modified. You can set the restriction for the following conditional rules:



- Last modified date **is** the specified date
- Last modified date **is not** the specified date
- Last modified date **is before** the specified date
- Last modified date **is after** the specified date

## Page Restrictions

**Editors** 


Select user(s) 


**Viewers** 




Jessica Goldman  


☒ **Show or hide based on conditional logic**

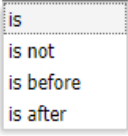
For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)



☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set 

If Any  of the following match:

Last Modified  is  10/19/2017 

Then Hide the page 



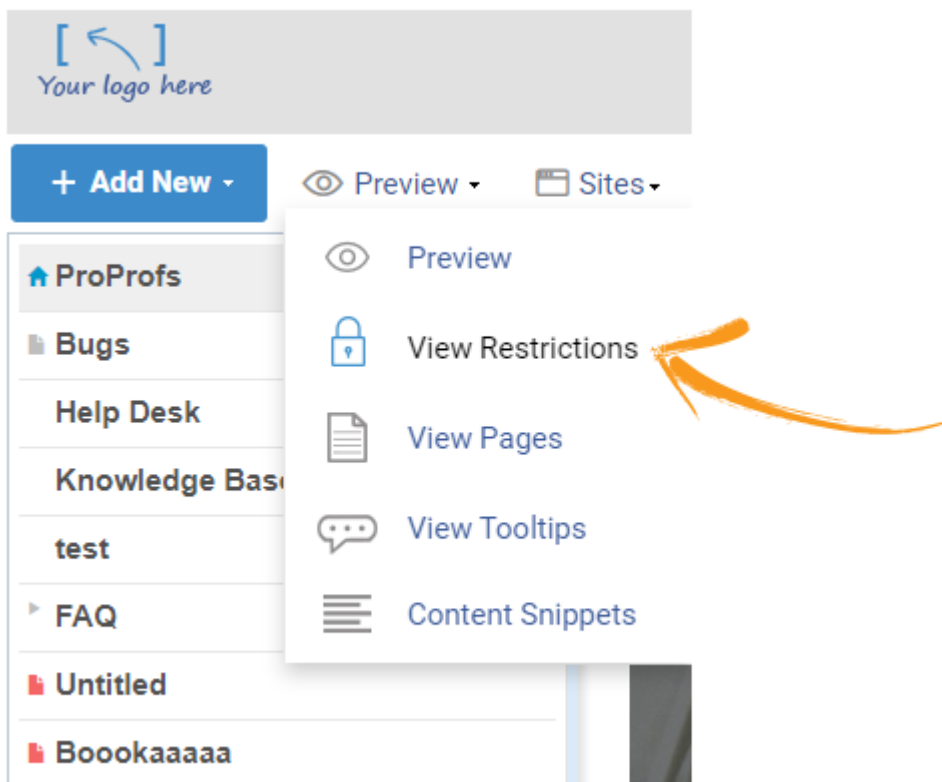
**Add condition**

**Save** **Close**

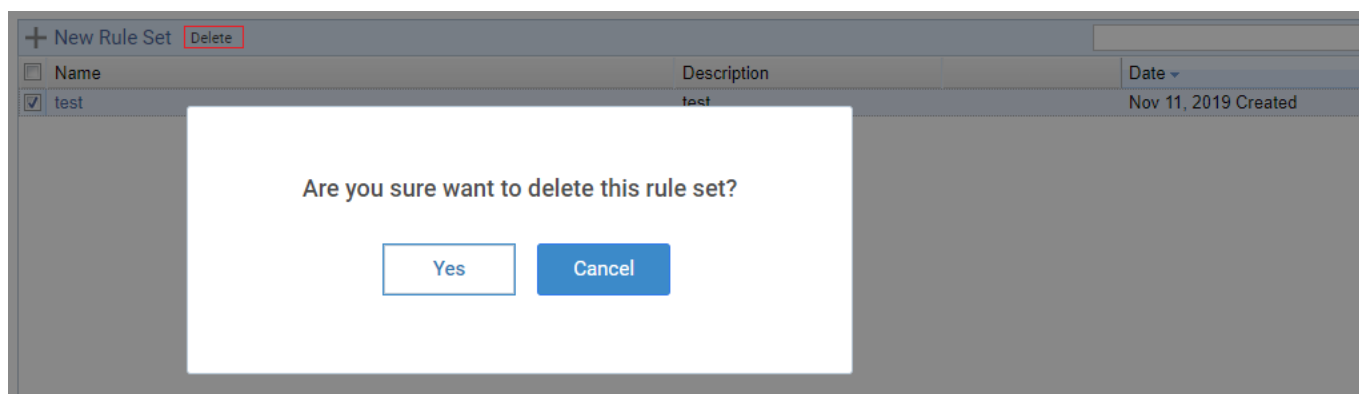
## Edit/Delete Page Restrictions

User can **Edit & Delete** page restrictions.

**Step 1:** Click on the **Preview** drop-down. Select **View Restrictions** from the menu.



**Step 2:** Select the page restriction which you want to delete and click on **Delete** button.



If you want to **Edit** the page restrictions, click on the page restriction which you want to Edit. A pop-up will open form here you can change the settings for the page restriction.

A screenshot of a web application interface showing a form titled 'Show or hide based on conditional logic'. The form has a close button (X) in the top right corner. Below the title, there's a paragraph of text: 'For example, you can set up a rule to make this page visible just for 'user role = administrator'.Keep repeating yourself? You can create conditional rule sets that you can easily apply to any page for folder. [Learn more](#) about conditional content'. The form contains several input fields: '\* Name:' with the value 'test', 'Description:' with the value 'test', and 'Sharing:' with a checkbox 'Share rule set between all sites'. Below these is a conditional logic section: 'If Any' of the following match: 'Contextual Help' is 'Lightbox', 'Then Hide the content'. To the right of this section is a red minus button and a green plus button labeled 'Add condition'. At the bottom right are 'Save' and 'Close' buttons.

## Related Articles:

[Introduction to Conditional Content](#)  
[Private Sites](#)  
[IP Restrictions](#)



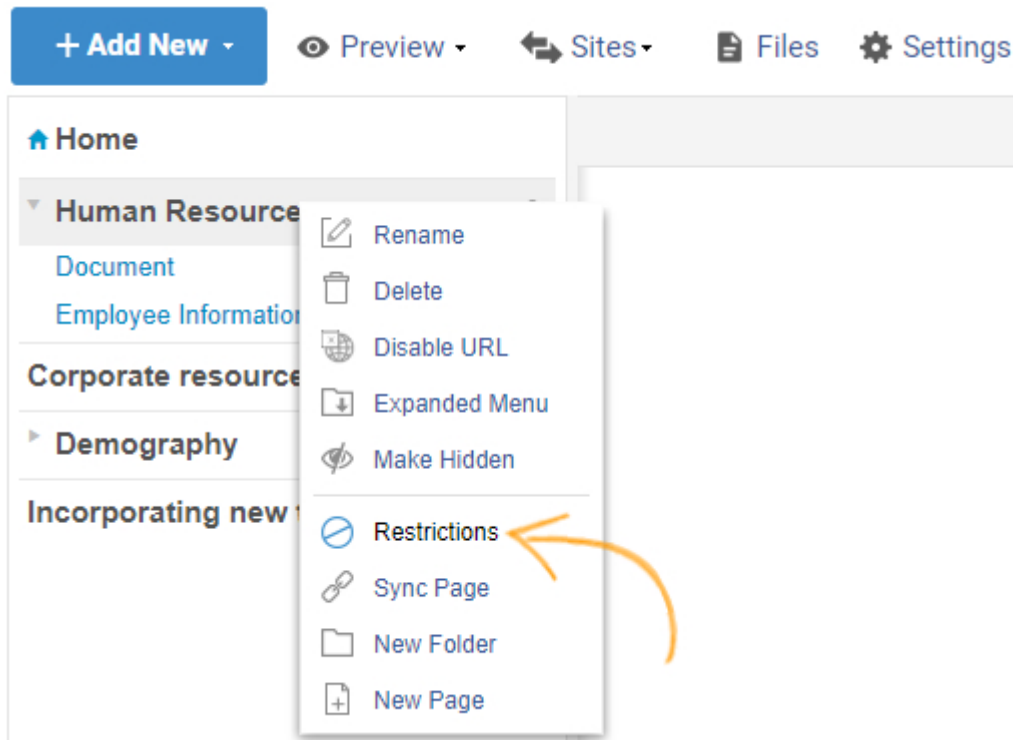
# Folder Restrictions

You can add conditions at the folder level and choose to display or hide certain folders, from your customers or employees, in your help-site.

- **Grant editing access to only authorized employees** - You can allow only authorized content-managers to edit the folder, while hiding it from other employees and stakeholders.
  - **Show or hide folders from customers or partners** - You can show the folder to only select customers or partners while hiding it from others.
  - [How to restrict viewing to users](#)
  - [How to restrict editing to users](#)
  - [Device Viewing](#)
  - [Site Language](#)
  - [URL Parameter](#)
  - [SSO Parameter](#)
  - [User Groups](#)
- 

## How to restrict viewing to users

1. Locate the folder and click on "Restrictions".



2. Under "Folder Restrictions", from the "Viewers" drop down menu select the users to restrict folder visibility for them.

#### Folder Restrictions

Editors ?  
Select user(s) ▼

Viewers ?  
▼ John Doe  
Clara Johnson  
Jessica Goldman  
Mike Doe

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set ▼

If Any ▼ of the following match:

Select Condition ▼

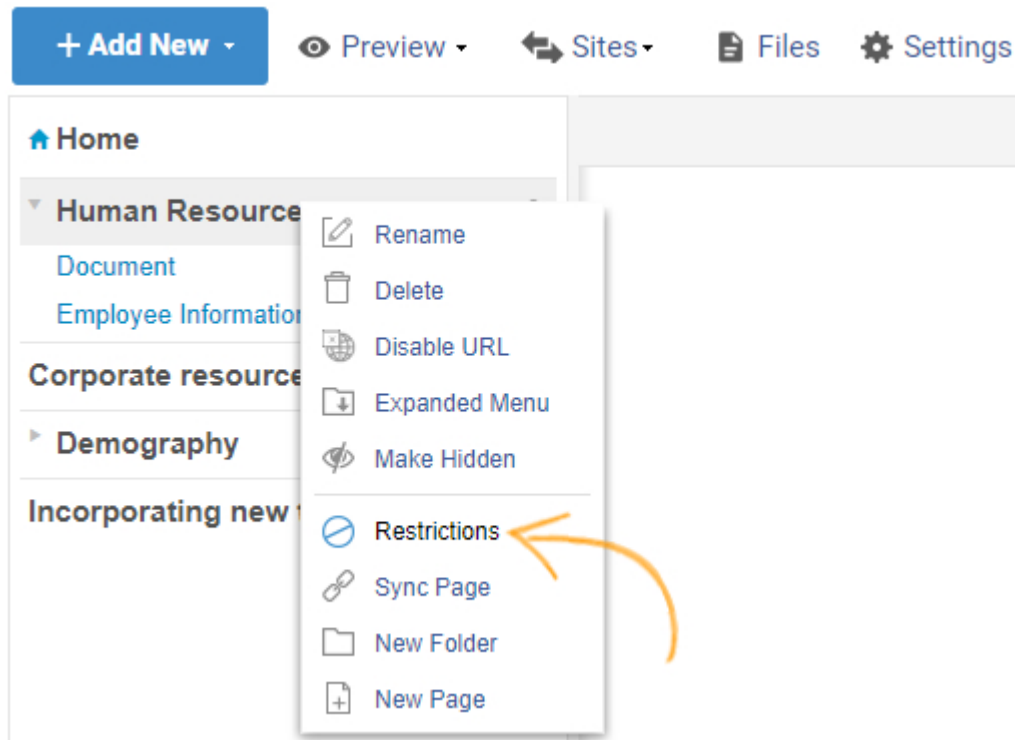
Then Hide the folder ▼

Save Close

+  
Add condition +


## How to restrict editing to users



1. Locate the folder and click on "Restrictions".



2. Under "Folder Restrictions", from the "Editors" drop down menu select the users to restrict editing for them.

### Folder Restrictions

**Editors** 



John Doe


Clara Johnson

Mike Doe


Jessica Goldman

☒ **Show or hide based on conditional logic**  
For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)


☒ Enter your own rules using the logic builder ☐ Apply a rule set 

select rule set


If 



Any

 of the following match:

Select Condition

Then 

Hide the folder

Add condition

Save

Close

## Viewing Device

You can restrict users from editing or viewing the folder based on the devices they are using to access your help site.

- Under "Folder Restrictions" Select the users you want to restrict editing or viewing to and then select "Viewing Device" and choose the device.

## Folder Restrictions

**Editors** ?  
Mike Doe X

**Viewers** ?  
Mike Doe X

☒ **Show or hide based on conditional logic**  
For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set

If Any of the following match:

Viewing Device is Phone

Then Hide the folder

Add condition

Save Close

## Site Language

You can restrict users from editing or viewing the folder based on the language of your help site.

- Under the "Folder Restrictions" select the users you want to restrict editing or viewing to and then select "Site Language" and choose the language.

### Folder Restrictions

**Editors** ?

Mike Doe X

**Viewers** ?

Mike Doe X

☒ **Show or hide based on conditional logic**

For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set

If Any of the following match:

Site Language is German - Deutsch

Then Hide the folder

Add condition

Save Close

## URL Parameter

You can use URL parameters to hide or show certain folders in you help site. These parameters help you to determine which content to show to which users.

- Select which users you want to restrict editing or viewing to and then select "URL parameter" to add the parameter.

Folder Restrictions

**Editors** ?

Mike Doe X

**Viewers** ?

Mike Doe X

☒ **Show or hide based on conditional logic**

For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set

If Any of the following match:

URL Parameter is corp = yes

Then Hide the folder

Add condition Remove condition


Save Close



## SSO Parameter


Similar to a URL parameter, you can pass an SSO parameter to your help site. When users login to your site, an SSO parameter is instantly sent to ProProfs. Based on it, certain folders in your help site are either shown or hidden from your users.



- Select which users you want to restrict editing or viewing to and then select "SSO parameter" to add the parameter.

## Folder Restrictions

**Editors** 


Mike Doe  


**Viewers** 



Mike Doe  


☒ **Show or hide based on conditional logic**



For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set 

If Any  of the following match:

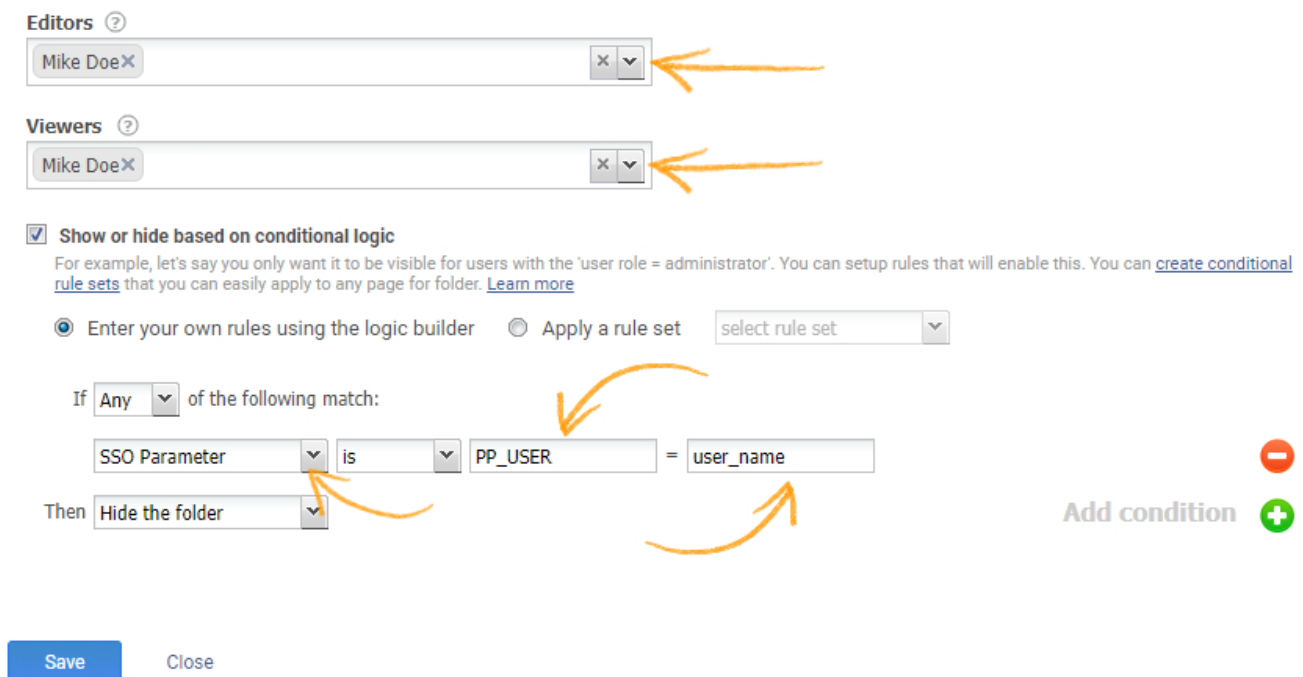
SSO Parameter  is  PP\_USER = user\_name

Then Hide the folder 

Add condition

Save Close



## User Group


You can restrict users from editing or viewing the folder based on the role of the user.

- Under "Folder Restrictions" select users you want to restrict editing or viewing to and then select "User Role" and choose the role of the user.




### Folder Restrictions

**Editors** ?

Mike Doe ✕ ▼ 

**Viewers** ?


Mike Doe ✕ ▼ 


☒ **Show or hide based on conditional logic**

For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set ▼

If Any ▼ of the following match:

User Group ▼ is ▼ Administrator ▼ 

Then Hide the folder ▼ 



Administrator

Administrator

Editor

Contributor

Viewer (Read-Only)

  **Add condition**

Save Close

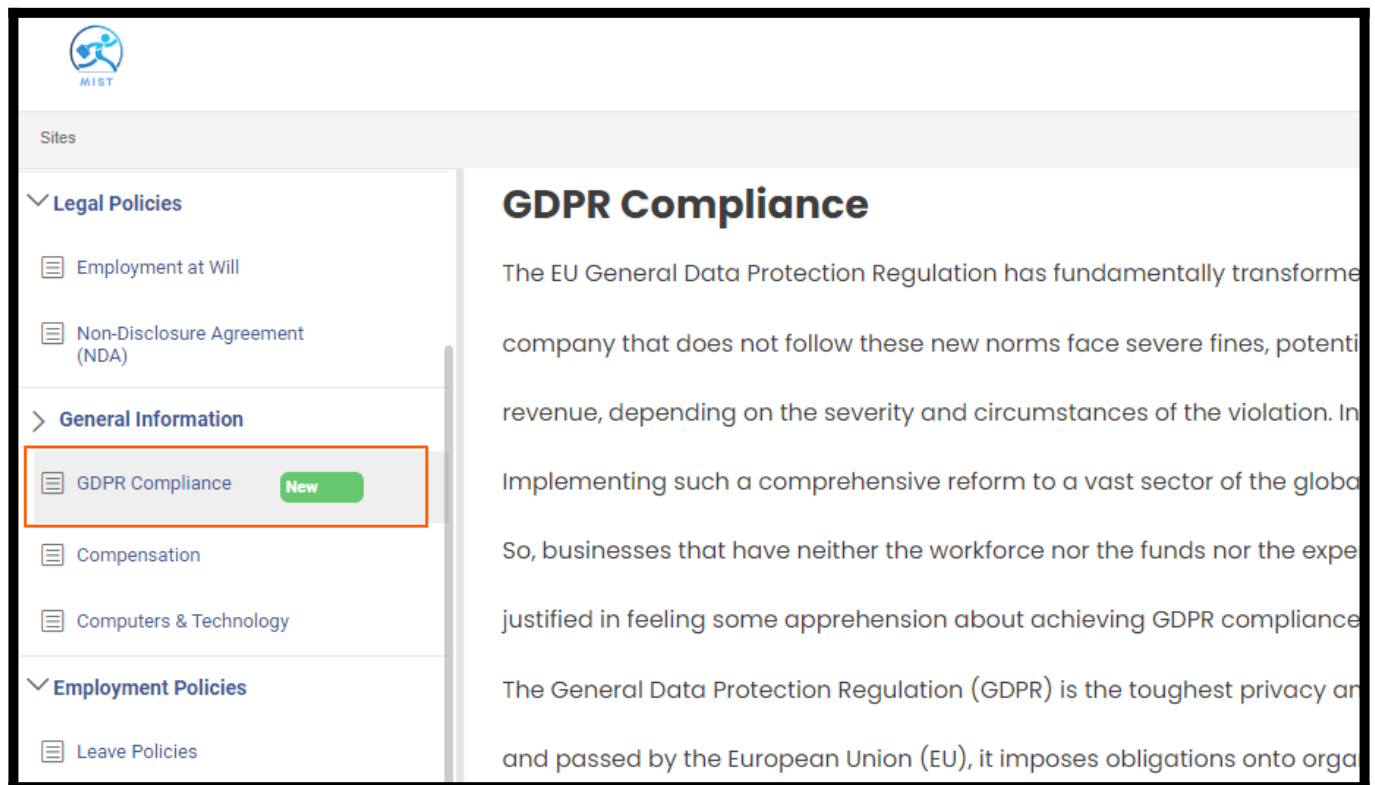
**Suggested Reading:** [Introduction to Conditional Content](#)

# What are Callouts?

In the ProProfs Knowledge Base Editor, you can highlight new and updated help articles using callouts. Callouts are tiny graphic illustrations that grab the user's attention to specific help pages.

Callouts increase the visibility of a new or updated feature and immediately inform visitors of changes that enhance the customer experience. Frequent users and visitors can save themselves from the hassle of tackling customer support by seeing the relevant article.

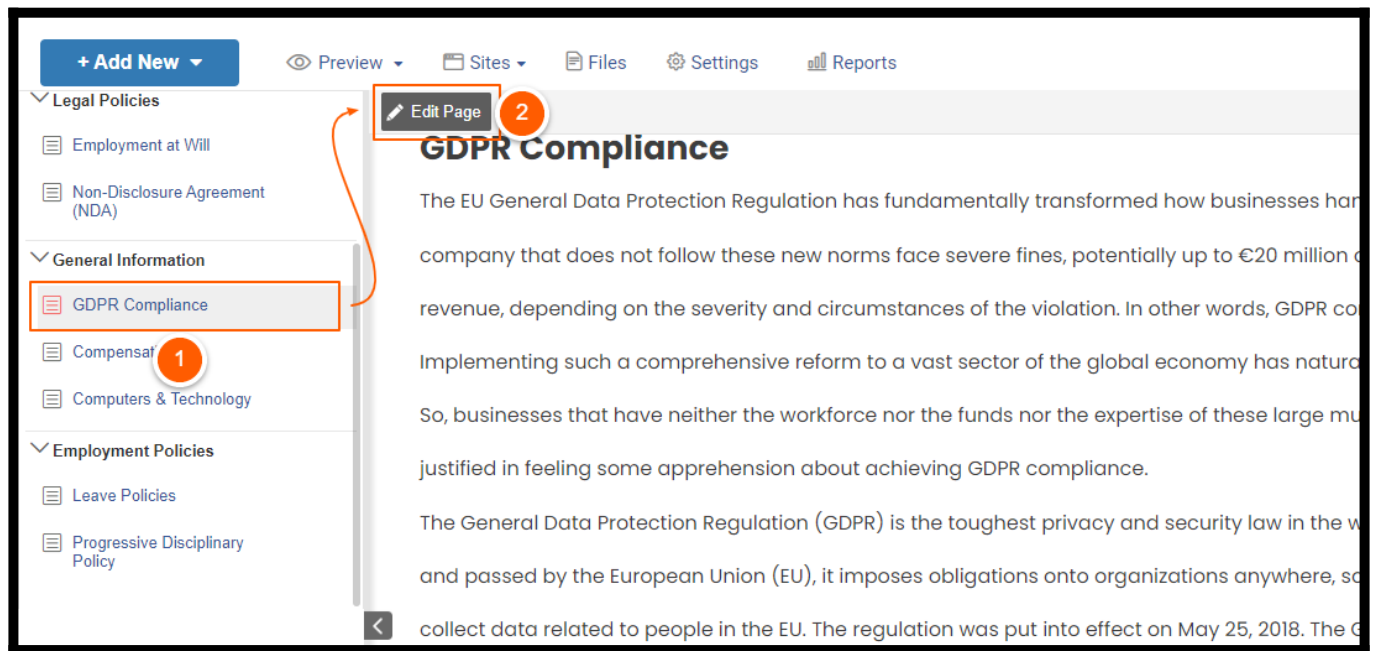
**Here's how the callouts show up in TOC:**



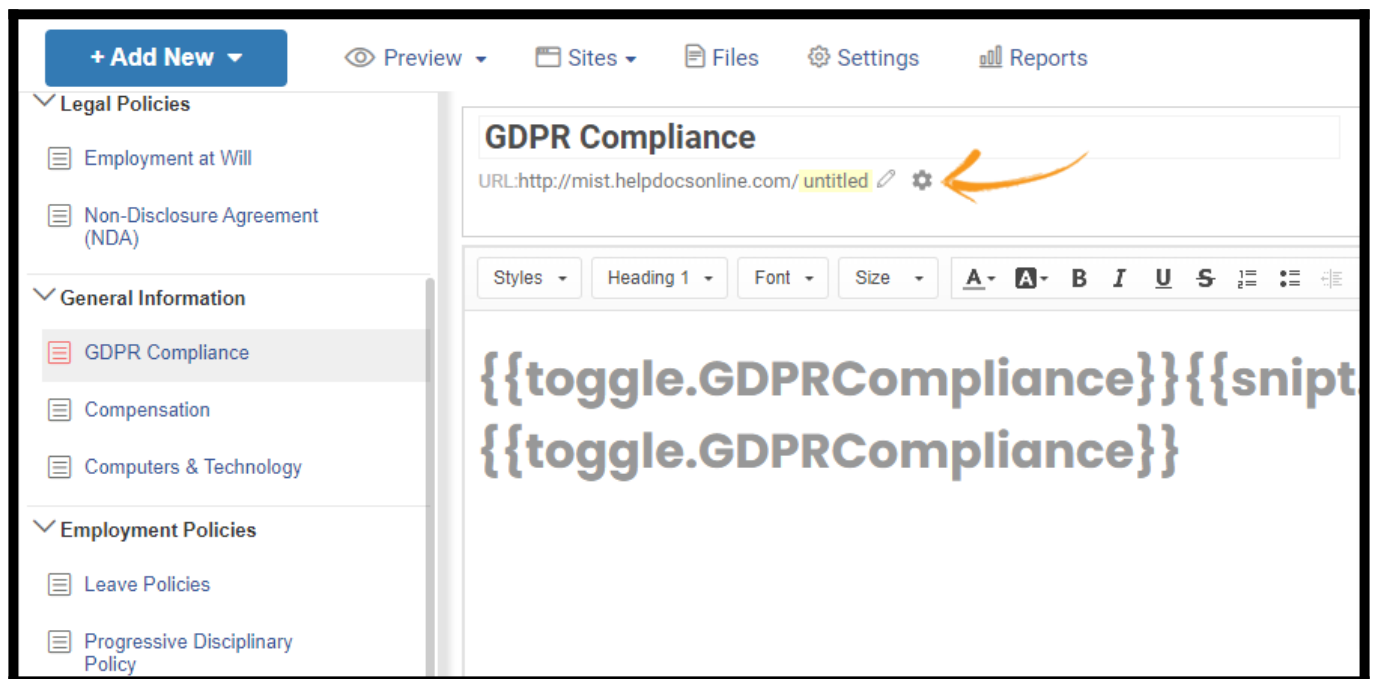
## How to Enable Callouts in ProProfs Knowledge Base

**In the ProProfs Knowledge Base editor:**

**Step 1:** Select the help article from the TOC and click **Edit Page**.



**Step 2:** Click the **Settings** icon.



**Step 3:** Switch to the **Advanced** tab. Select the "callout" **type**, **start**, and **end date**. Click **Save** when finished.

**Basic** **Advanced**

Call Outs

New

1

Callout Start

22 - 07 - 2022

Callout End

31 - 08 - 2022

2

Page Links

URL:

http://mist.helpdocsonline.com/untitled

Permalink:

http://mist.helpdocsonline.com/ID3016739

Static Link:

http://mist.helpdocsonline.com/static/ID3016739

Page Restrictions

Restrictions

Published on

Published till

Save

3

Cancel

**Step 4: Click Publish and go to Preview.**

+ Add New

Preview

Sites

Files

Settings

Reports

Search

Legal Policies

GDPR Compliance

URL: http://mist.helpdocsonline.com/untitled

Status: Draft

Save Draft

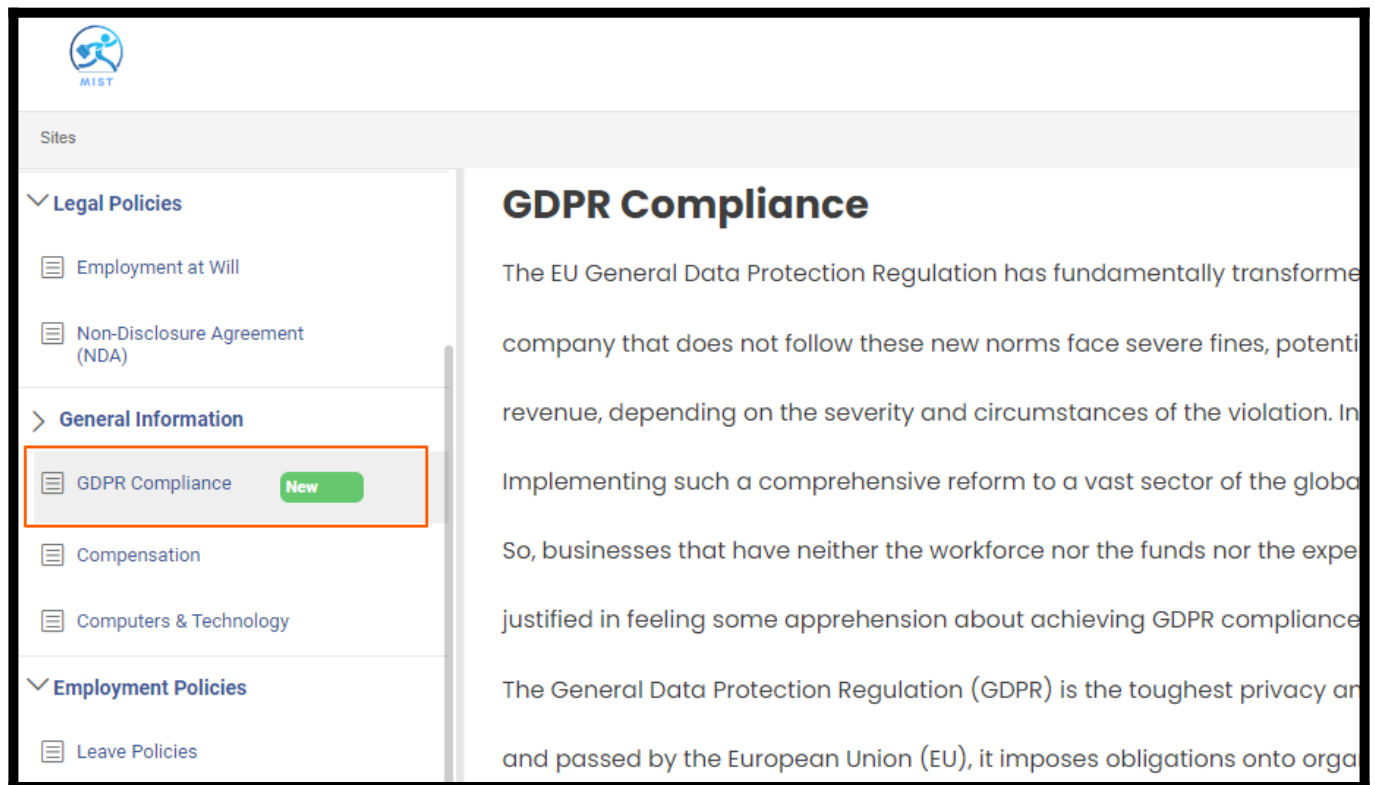
Preview

Publish

1

2

The callout will now appear in the TOC.



*That is all about adding callouts to help pages in ProProfs Knowledge Base.*

### Related Articles:

- [Editor Toolbar](#)
- [How to Add and Publish a Page](#)
- [How to Customize the Homepage of Your Help Site](#)

# Table of Contents (Side Menu)

# Overview

The Table of Contents lists a site's hierarchy of pages, folders, and subfolders. In the ProProfs Knowledge Base, you get two styles for TOC- Modern & Tree. You can select any of the two and customize them accordingly.

## Benefits of the TOC:

- Users can easily navigate between articles
- Users can quickly understand the information flow
- Authors can neatly organize the articles

Below is a preview of TOC on a help site:



This article covers the following:

- [Working with Pages, Folders, and Links](#)
- [Table of Contents Style](#)
- [Drag and Drop to Reorder](#)
- [Customizing the Table of Contents](#)
- [Turn Off the Table of Contents](#)
- [Show Book Icons](#)

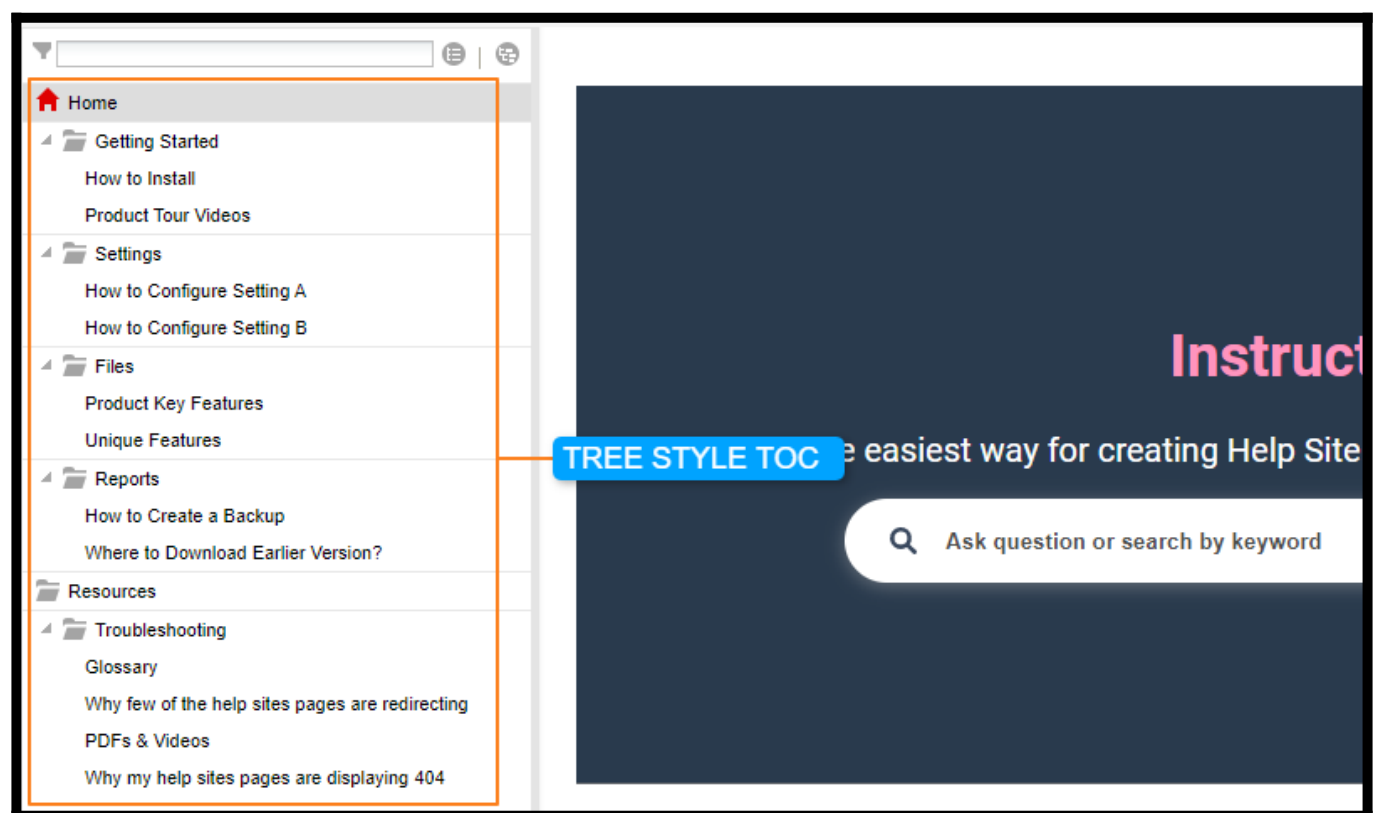
## Working with Pages, Folders, and Links

Adding [pages](#), [folders](#), and [links](#) to the table of contents is effortless. Please check out the respective articles.

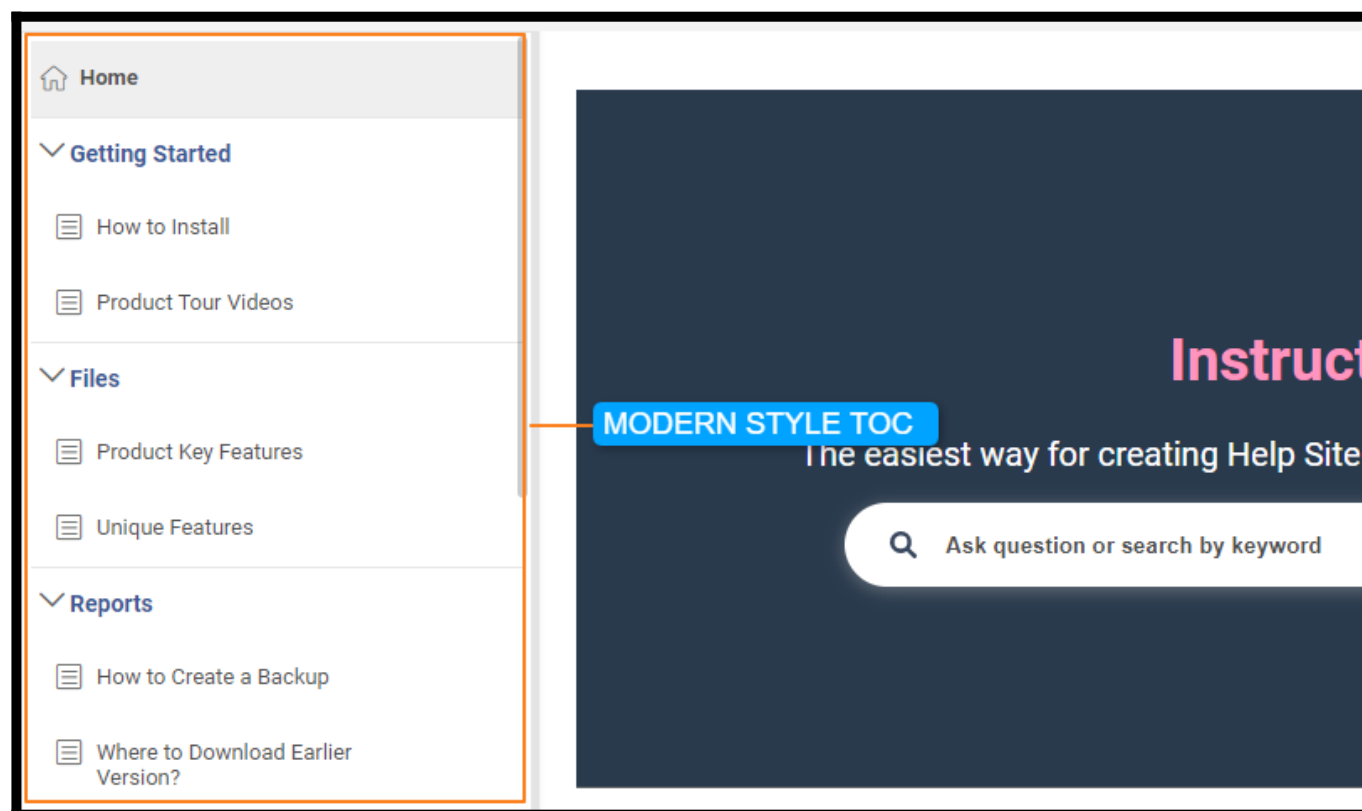
## Table of Contents Style

We currently offer two styles –**Modern** and **Tree**. You can change the style in the Site Settings.

Go to **Settings > Table of Content**.



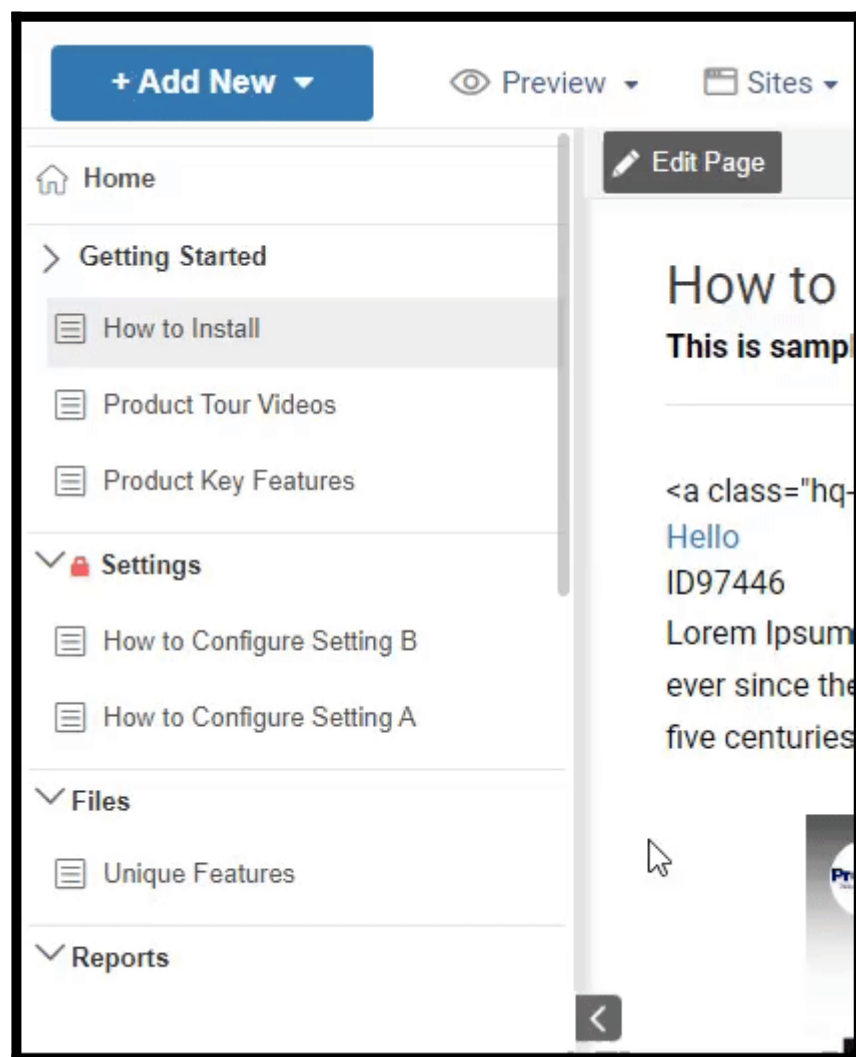




## Drag and Drop to Reorder

You can move pages or folders through simple **drag and drop**. Pages can be reordered, placed in folders, or on top of other pages. Folders can be reordered or placed in different folders as subfolders.

Check for the **split indicator** while dropping a page/folder in the TOC.



## Customize the Table of Contents

You can customize the Table of Contents, including:

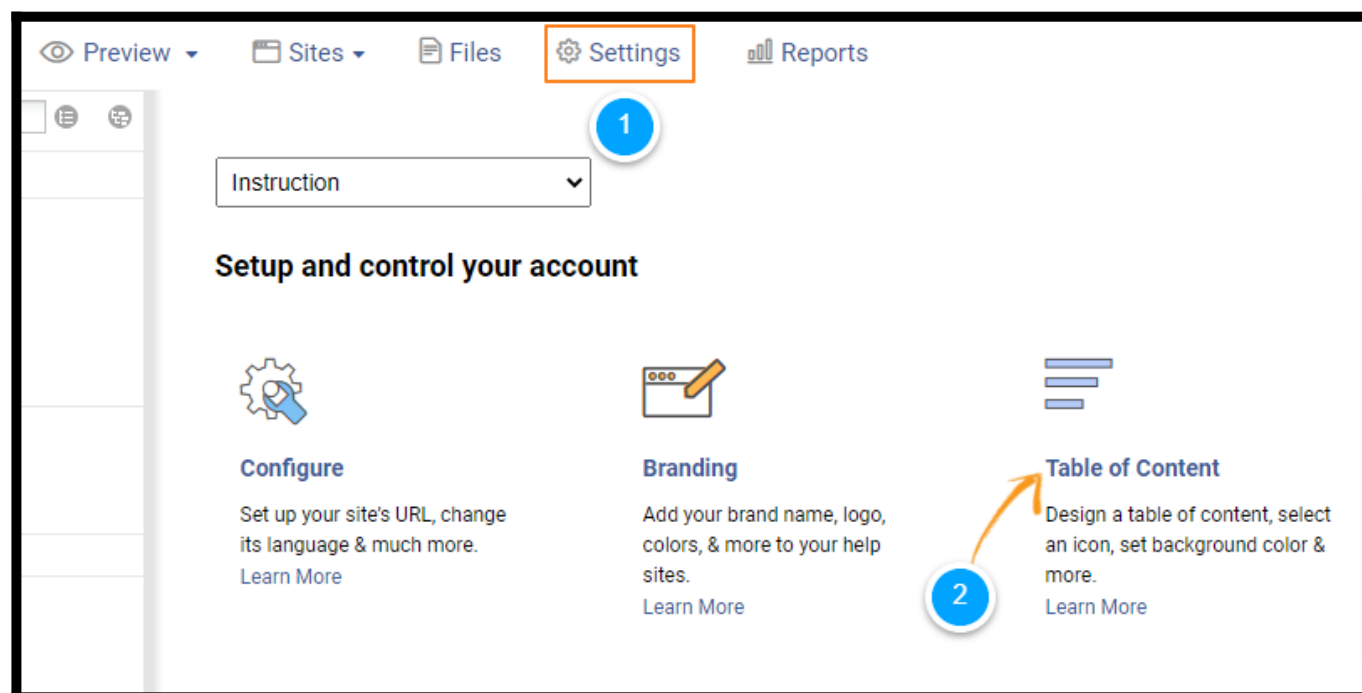
- Font size and spacing
- Width of the table of contents panel
- Show/hide the page or folder icons
- Folder options and more

Read also [Add and Customize the site.](#)

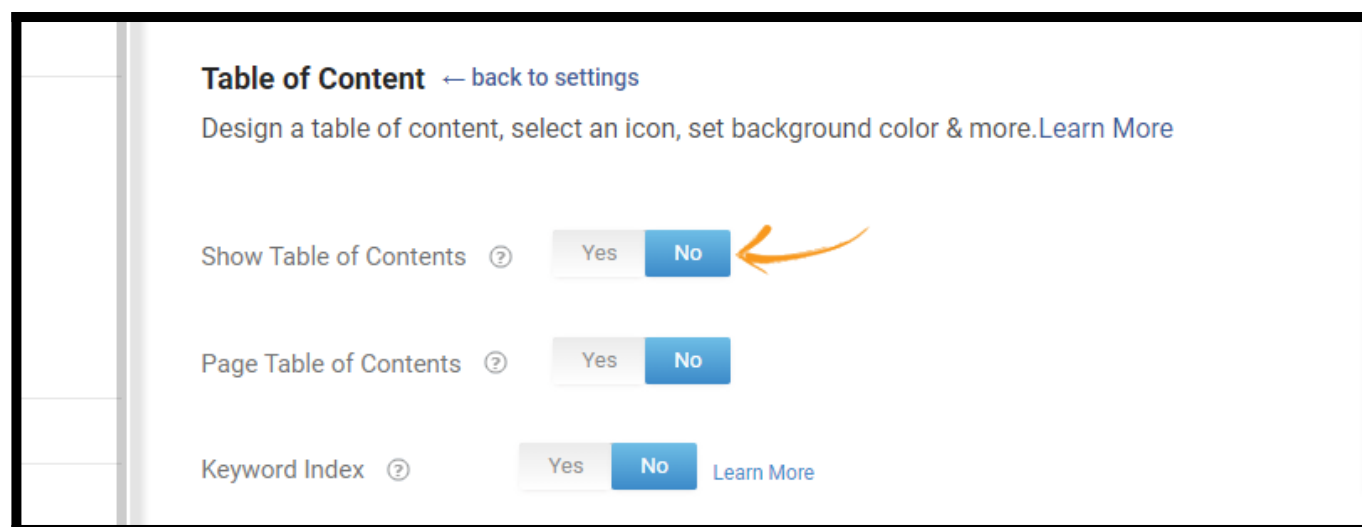
## Turn Off the Table of Contents

If you do not want a table of contents for your site, you can turn off this feature.

- Go to Site **Settings** > **Table of Content**.



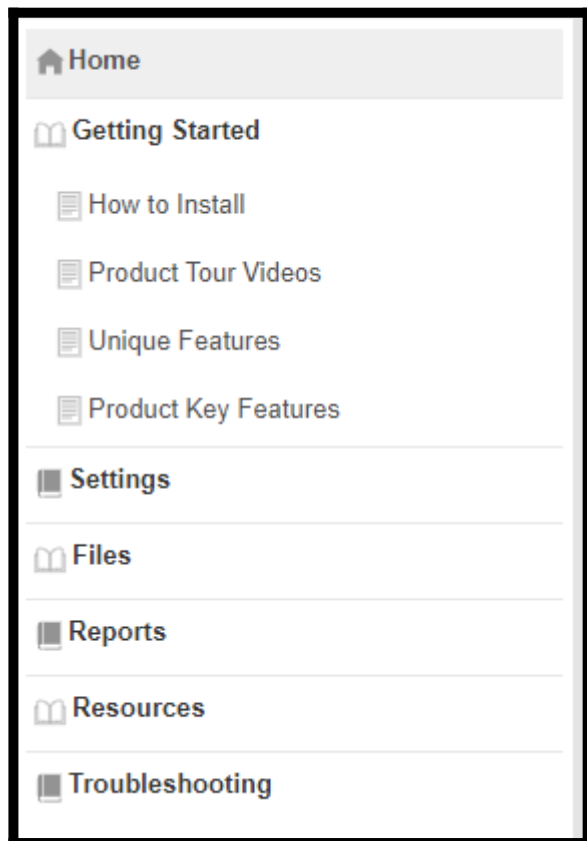
- Click **No** to disable the table of content.
- Scroll down and click **Save**.



**Note:** Your user role will determine whether or not you have access to the Settings section.

## Show Book Icons

You can add **book-style** icons for folders and pages, as shown in the image below.



To add the book-style icons,

- Go to **Settings > Table of Content**.
- Choose **Modern Style** TOC.
- Select **Book** as the preferred icon type.
- Click **Save**.

Show Table of Contents ? Yes No

Page Table of Contents ? Yes No

Style Modern

☒ Hide empty folders logged out

Choose Icons Book

Width

BG Color

<

Book

Page

Book

Plus & Minus

Arrow

Notes

*This is an example Table of Content*



If you have used your CSS style for TOC icons in "site override CSS," then you need to remove your CSS to prevent any conflicts.

*That is all about adding ToCin ProProfs Knowledge Base.*

### Related Articles:

- [Pages in the Table of Contents](#)
- [Add a Lightbox](#)
- [Working With Images](#)

# Pages in the Table of Contents

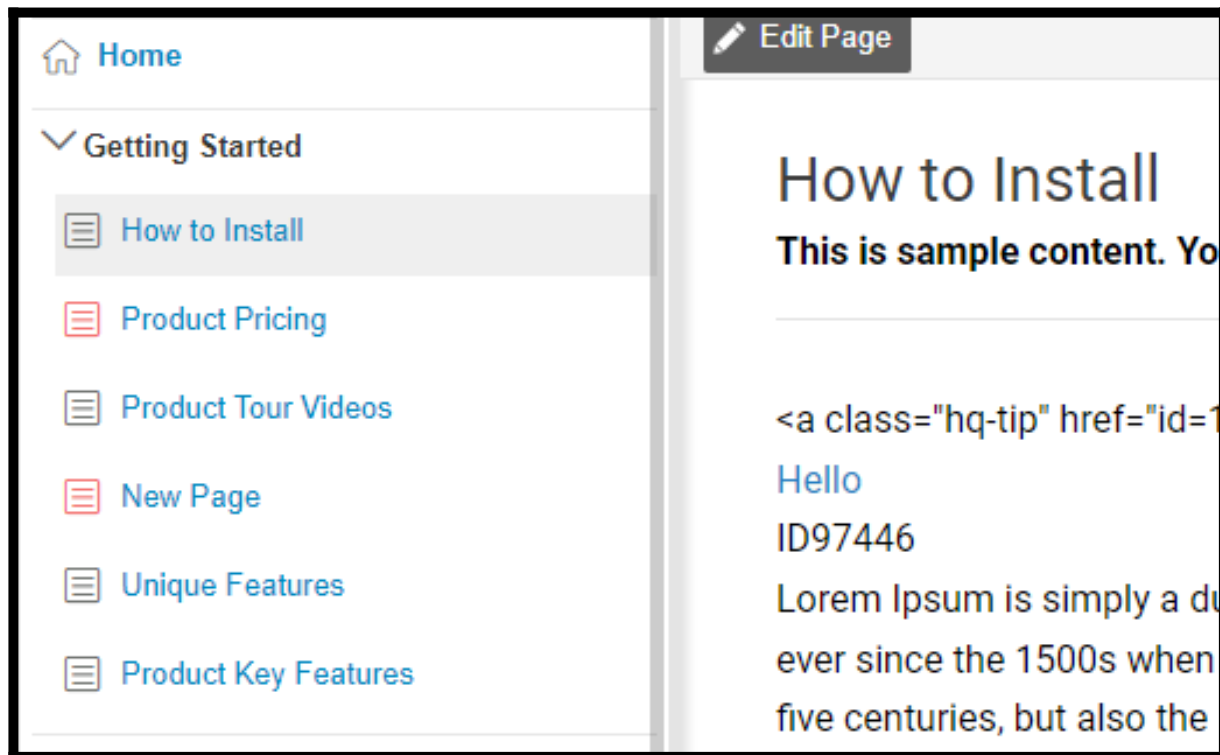
ProProfs Knowledge Base allows you to organize, edit, and manage pages in the table of contents to enhance the end-user experience.

You get multiple quick settings in the ToC that allow you to manage all pages seamlessly.

## The page settings will help you:

- Improve user navigation.
- Reduce time in locating the correct information.
- Enhance the overall appearance of the help center.

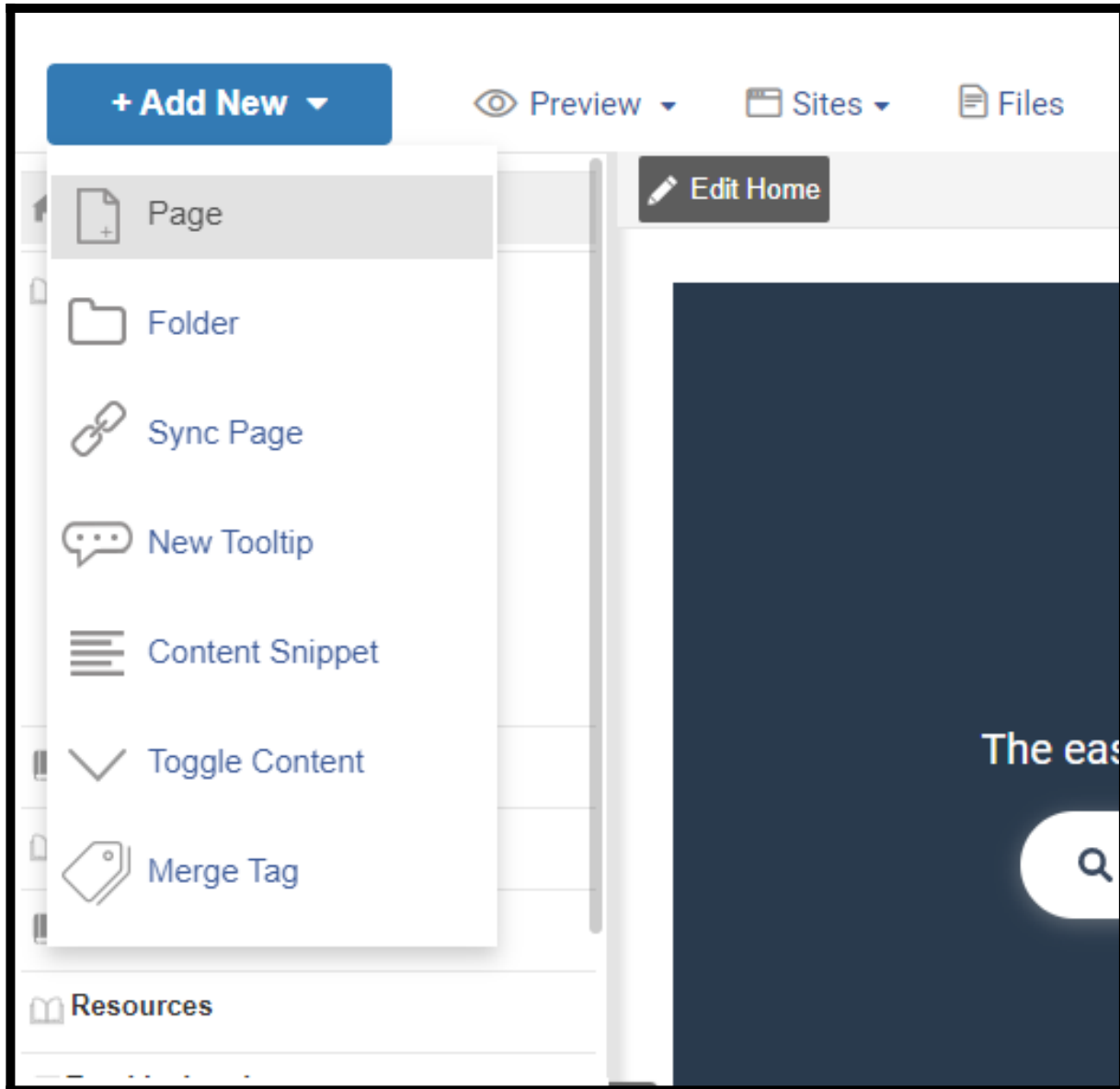
## Preview of Pages in the ToC



- [Add a Page to the Table of Contents](#)
- [Icons](#)
- [Hide a Page from the Table of Contents](#)
- [Rename a Page](#)
- [Context Menu \(Right-Click\)](#)

## Add a Page to the Table of Contents

- Go to **+Add New > Page** in the toolbar.

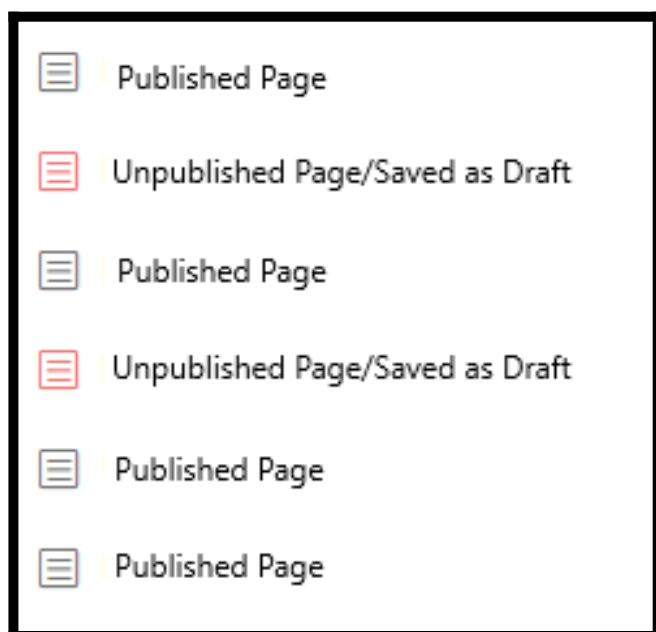


- **Select a template or create one from scratch.** A new page will get added to the table of contents (and the content editor for the new page opens).
- Enter a **name** for the page, and click outside the text input field to save the new page name.

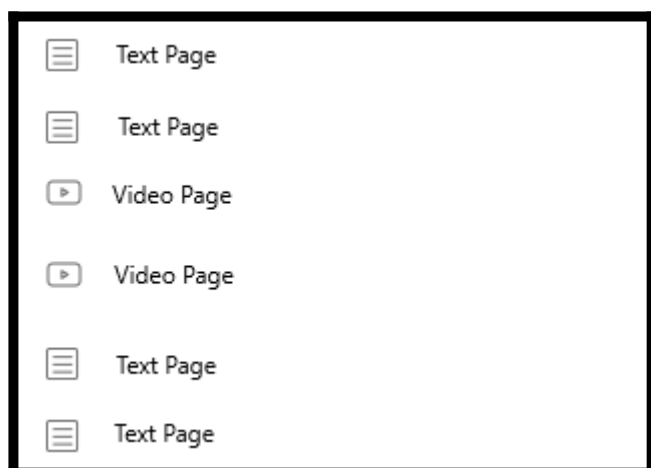
## Page Icons

Here are the icons for pages that you will see in the table of contents (you can turn off the icons in the **Settings** section).

**In the editor,**



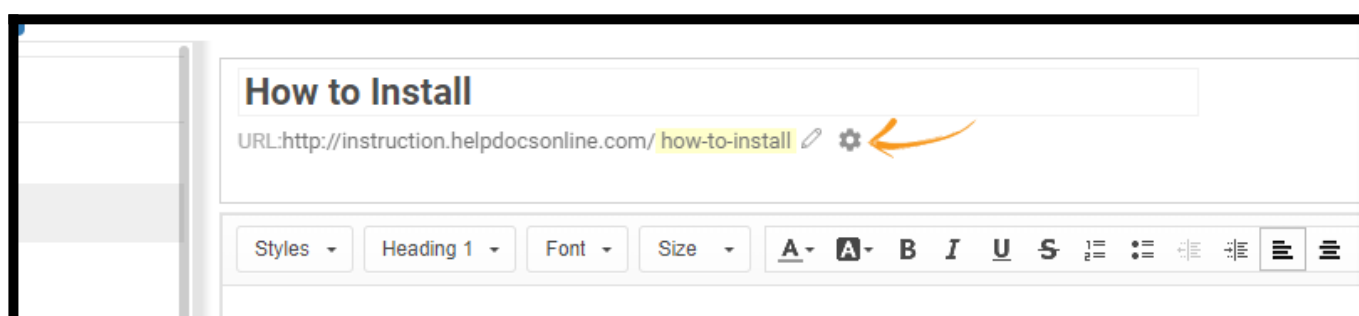
On the live site,



## Hide a Page from the Table of Contents

A page appears in the table of contents by default. However, you can **hide a page** from the table of contents by following the below steps.

- When editing a page, click the **gear icon** to access additional settings from the page details.





- To **remove** the page from the table of contents, uncheck "**Show page in table of contents.**" It will hide the page from the table of contents.

The screenshot shows the 'Basic' tab of a settings form. The 'Table of Contents' section is highlighted with an orange box, showing an unchecked checkbox for 'Show page in table of contents'. Other sections include 'Page Type' (Text selected), 'Author' (Rich Parker), 'PDF' (unchecked), 'Search results' (checked), 'Search engines' (unchecked), 'Feedback' (Enable selected), and 'Footer' (Enable selected). At the bottom are 'Save' and 'Cancel' buttons.

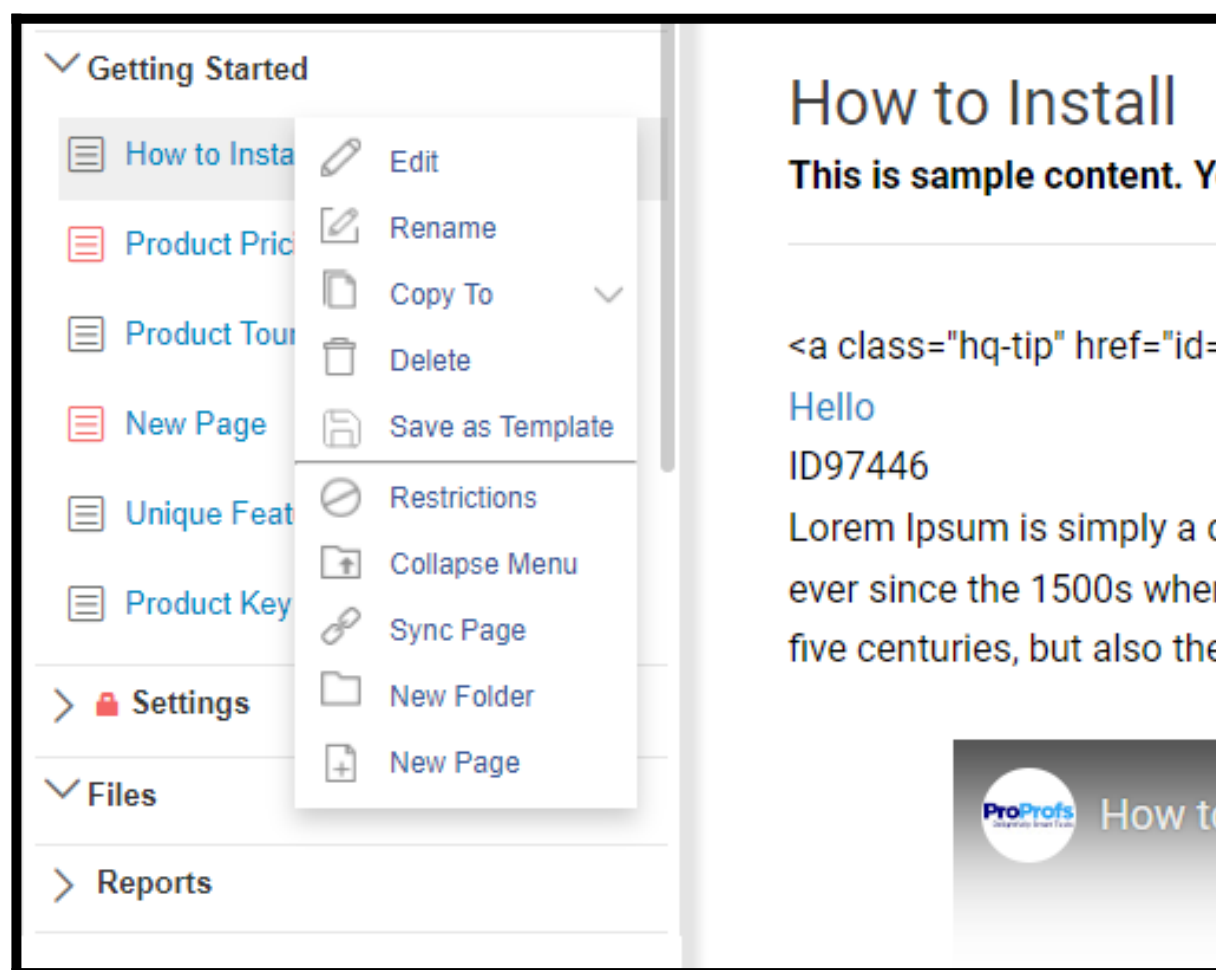
Basic		Advanced
Page Type	<input checked="" type="radio"/> Text <input type="radio"/> Video	
Author	Rich Parker	
Table of Contents	<input type="checkbox"/> Show page in table of contents	
PDF	<input type="checkbox"/> Default page to be included in the PDF	
Search results	<input checked="" type="checkbox"/> Show page in search result	
	<input type="text"/> Enter search keywords. Seperate each word or phrase by a comma	
Search engines	<input type="checkbox"/> Allow page to be crawled by search engines (Google, Yahoo, Bing)	
	<input type="text"/> Enter meta description. Limit to 320 characters	
Feedback	<input checked="" type="button"/> Enable <input type="button"/> Disable	
Footer	<input checked="" type="button"/> Enable <input type="button"/> Disable	
<input type="button"/> Save <input type="button"/> Cancel		

- To add the page back to the table of contents, check "**Show page in table of contents.**"
- If you hide a page from the table of contents, you can always find it in the [view all pages](#) grid.

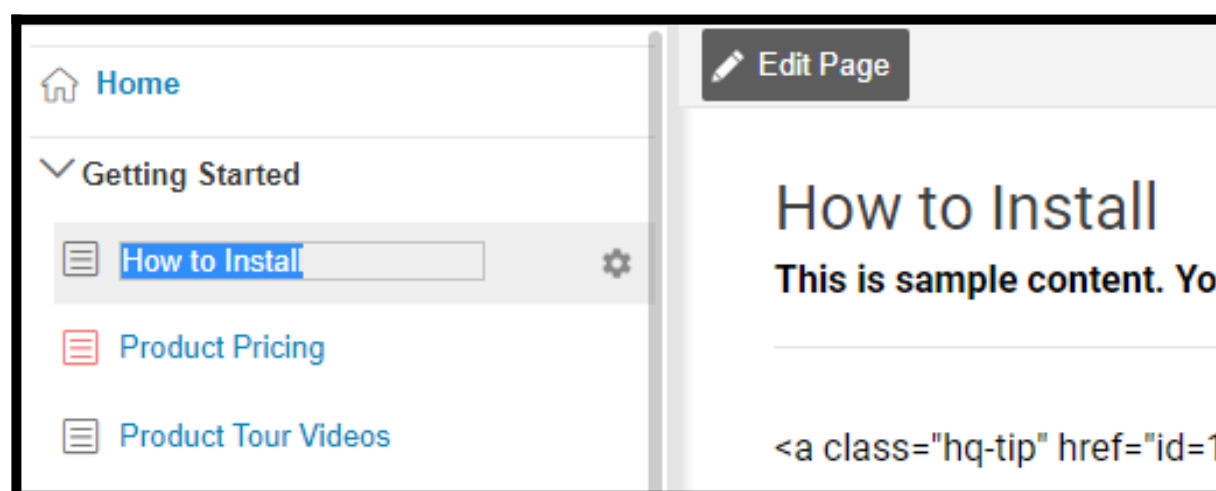
**NOTE:** This does not delete the page. It simply hides it from the table of contents. Suppose you want to delete the page, select **Delete** from the page's toolbar. It will also remove it from the table of contents.

## Rename a Page

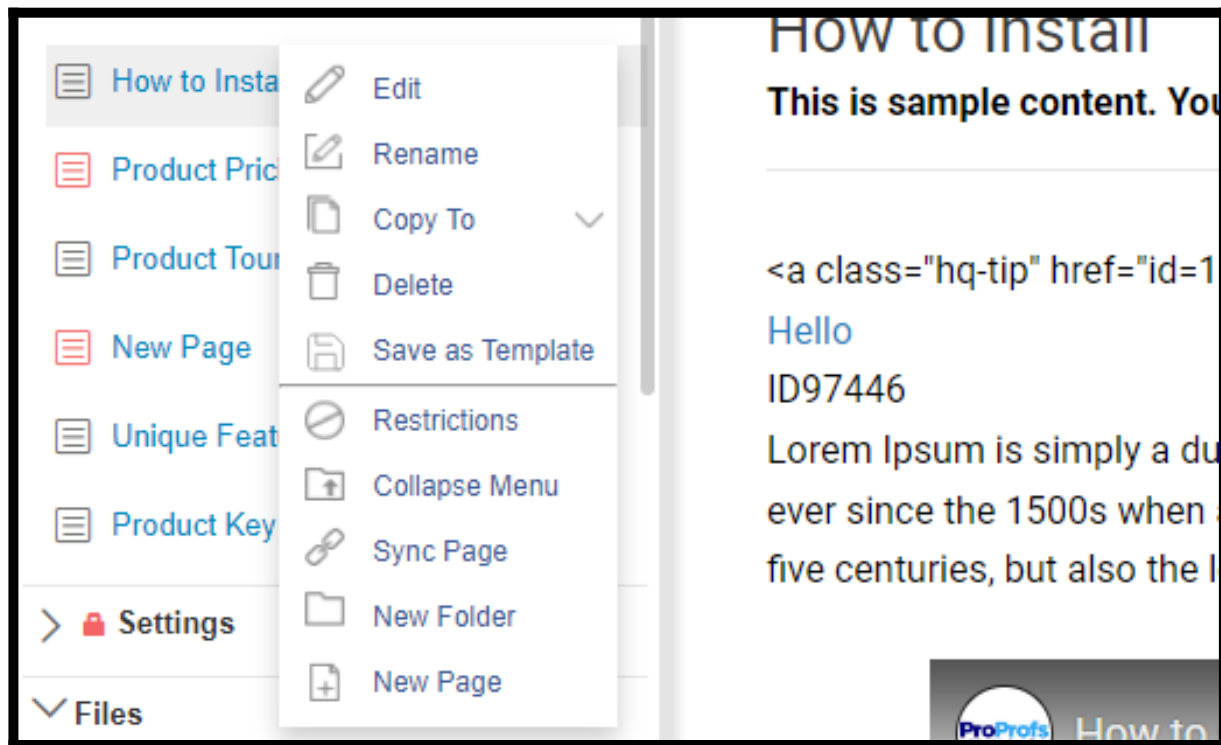
- To rename a page, **right-click** on the name in the ToC or hover your mouse to the page name and click the **gear icon**.



- Select **Rename** from the dropdown menu.
- Enter the new name and click outside the text input field to save.



## Context Menu (Right-Click)



1. **Edit:** Use this to open the page editor for page-related editing.
2. **Rename:** Change the page's name with this quick setting.
3. **Copy to:** Create a copy of the page on the same help site or a different one in case you have multiple help sites.
4. **Delete:** Deleting a page will move the page to the trash can. To permanently delete the page, the user must empty the trash can contents. You cannot delete a page that has subpages or folders. In that case, you will have first to drag out subpages from the parent page and then delete the concerned page.
5. **Save as Template:** Use this option to create a custom page template that you can reuse to create similar pages.
6. **Restrictions:** Restrict view or edit access rights of existing help site users.
7. **Collapse Menu:** It is folder-level customization.
8. **Sync Page:** Sync Page interlinks two pages with similar content but appears at different locations in the ToC. The feature helps you save time in editing them.
9. **New Folder:** Add a new folder in the ToC.
10. **New Page:** Create a subpage for the current page.

**NOTE:** Your user role will determine whether or not you have permission to delete pages or folders.

*That is all about pages in the TOC.*

## Related Articles:

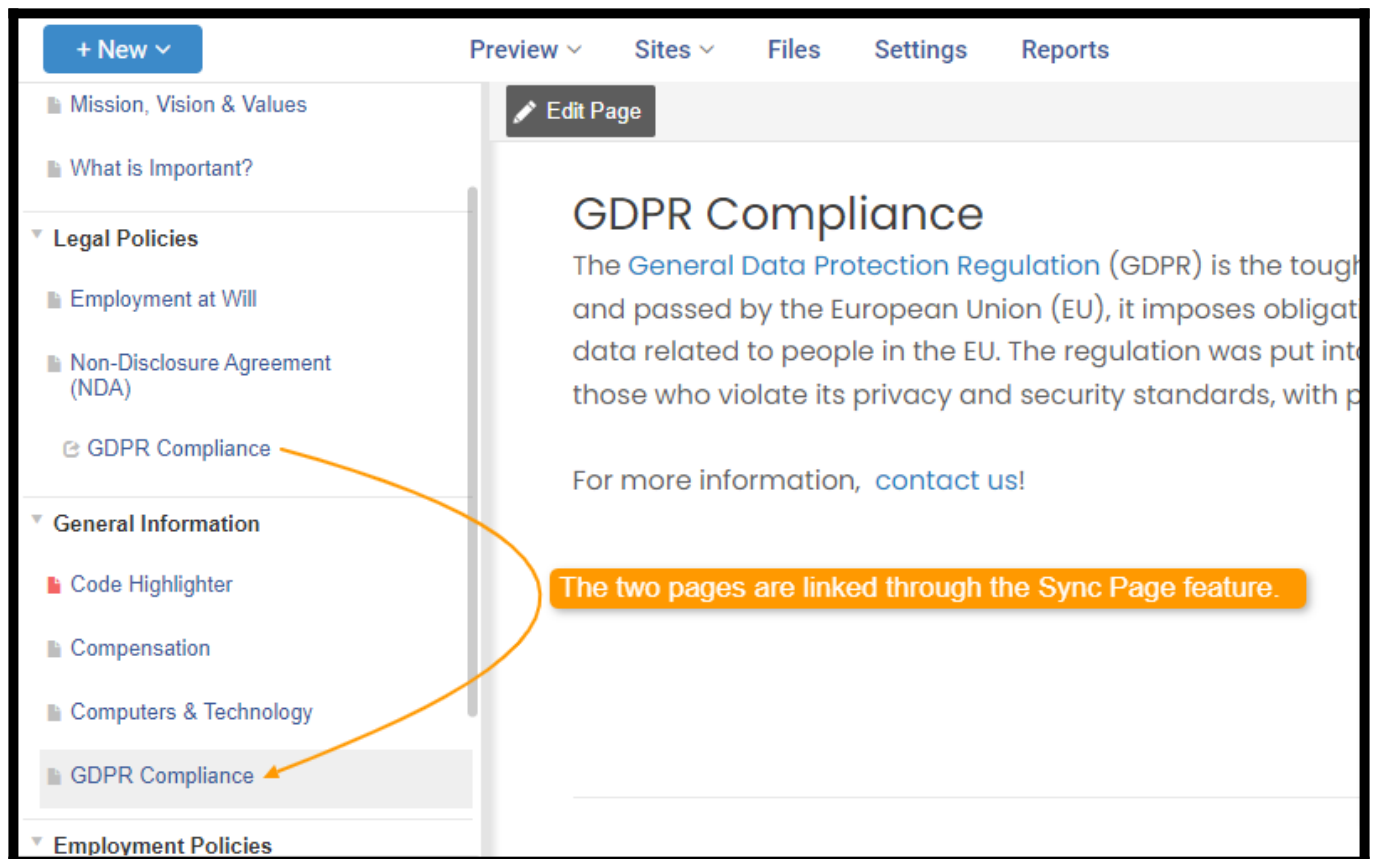
- [How to Add and Publish a Page](#)
- [Home Page](#)
- [How to Add/Delete, Edit, or Copy a Page](#)

# Links in the Table of Contents

In addition to pages and folders, you can add links to the table of contents. Links can point to other pages within your site or to external websites (such as [www.mycompany.com](http://www.mycompany.com)).

Adding links can improve the overall navigation experience of your users and also allows you to redirect them to the desired location.

**Here's how links will appear in the TOC:**



**This article covers the following:**

- [Add a Link](#)
- [Link to Another Page](#)
- [Link to an External Website](#)
- [Edit Link](#)

## Add a Link

In the ProProfs Knowledge Base, you can add a link through the "Sync Page" option.

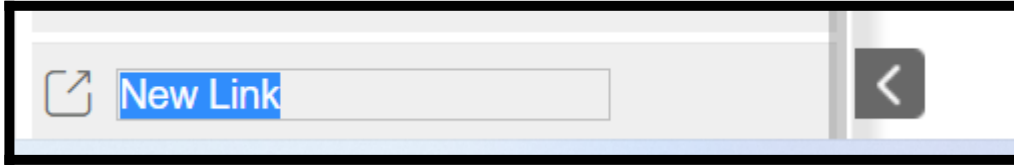
Follow these steps:

**Step 1:** Click **+ New** to open the drop-down and select **Sync Page**.

**Step 2:** As you click Sync Page, the system will automatically insert a link in the TOC.

Simultaneously, an overlay will open to define the link. You can skip the option and directly click **Save**.

**Step 3:** The link will appear as shown below. You can right-click and select **Rename** to add the link name. It is a new page you added to the ToC.



**Note:** You can drag-and-drop links in the ToC to your desired location similar to Pages.

## Link to Another Page

**Step 1:** Open the “+ New” drop-down menu and click “Sync Page.”

**Step 2:** Similar to adding a link in the TOC, you can interlink two pages. This will insert a new link into the table of contents (and open an overlay to define the link).

**Step 3:** Select the **page** you want to link to by clicking that page title. It allows you to have several entries in the table of contents for a single page.

Sync Page

{link\_to}

☒ {page}

☐ {external\_link}

☐ Show TOC Name Instead of Page Title

☐ Show only published pages

Page Title	Status	Last Modified	Author	Last Modified By
<a href="#">How to Install</a>	Published	July, 27 2022	Rich Parker	Rich Parker
<a href="#">Product Tour Videos</a>	Published	July, 27 2022	Rich Parker	Rich Parker
<a href="#">How to Configure Setting B</a>	Published	July, 25 2022	Rich Parker	Rich Parker
<a href="#">Unique Features</a>	Unpublished changes	July, 17 2022	Rich Parker	Rich Parker
<a href="#">Product Key Features</a>	Unpublished changes	July, 12 2022	Rich Parker	Rich Parker
<a href="#">Home</a>	Published	July, 09 2022	Rich Parker	Rich Parker
<a href="#">How to Configure Setting A</a>	Published	July, 09 2022	Rich Parker	Rich Parker
<a href="#">How to Create a Backup</a>	Unpublished changes	May, 26 2022	Rich Parker	Rich Parker
<a href="#">Where to Download Earlier Version?</a>	Published	January, 01 1970	Rich Parker	
<a href="#">Glossary</a>	Published	January, 01 1970	Rich Parker	

Page 1 of 1

Displaying items 1 - 1 of 1

Save

Cancel

The link will be created.

**Step 4:** Click **Save**.

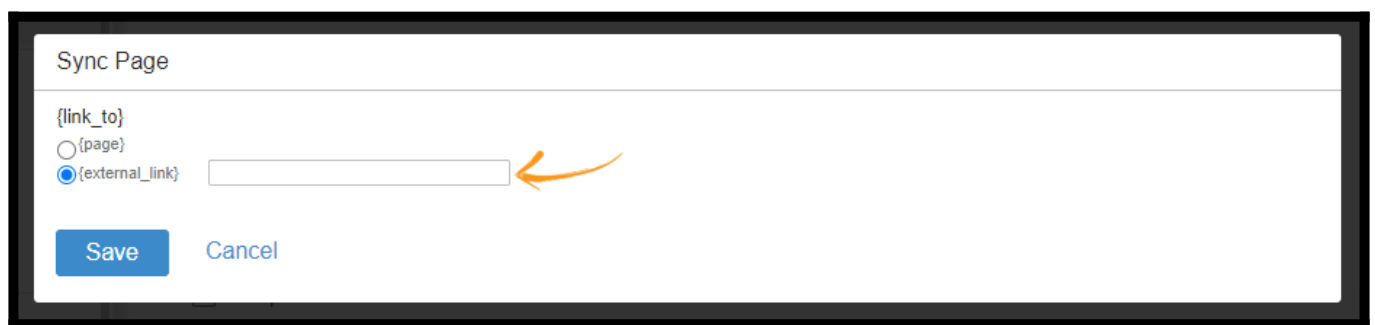
## Link to an External Website

**Step 1:** Go to “+ New” > “Sync Page.”

**Step 2:** Click the **radio button** next to the external link as shown in the screenshot below.

**Step 3:** Enter any web address available on the Internet, such as a website, a PDF document, or an image.

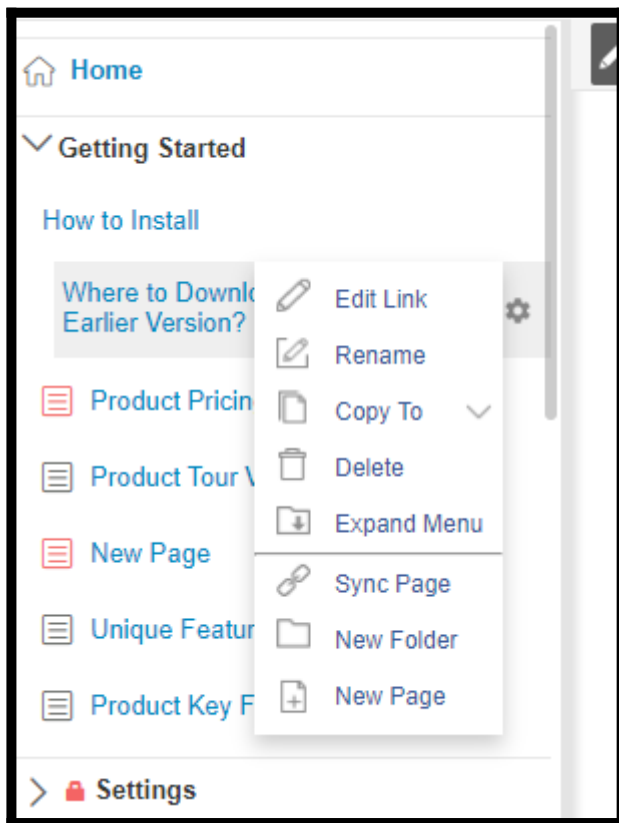
E.g., [www.site.com/about.html](http://www.site.com/about.html), [www.site.com/report.pdf](http://www.site.com/report.pdf)



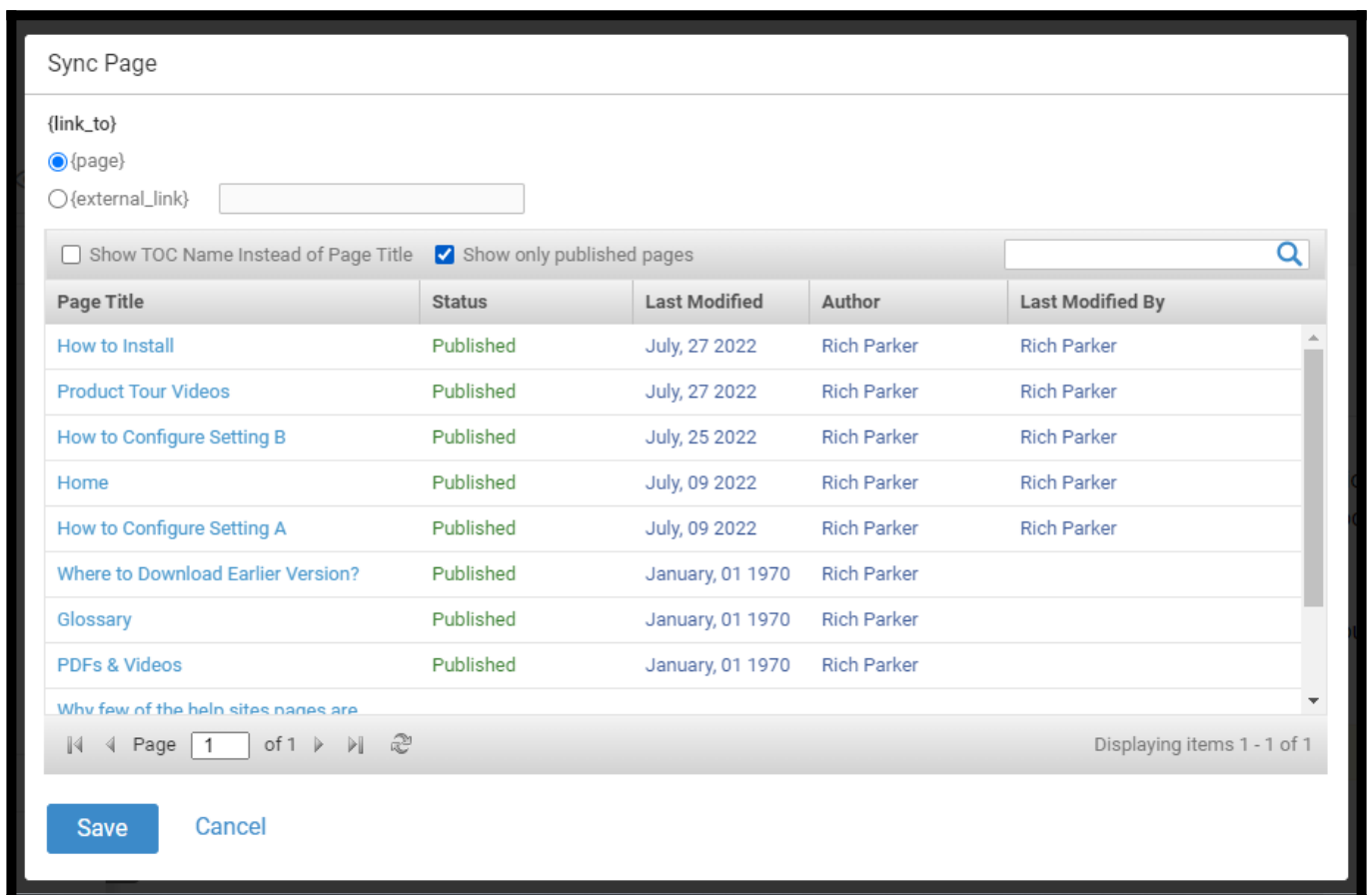
**Step 4:** Click **Save**.

## Edit Link

**Step 1:** Right-click on the added link and select **Edit Link**.



**Step 2:** You can sync the page to another page or external URL in the overlay.



*That is all about links in the TOC.*



## Related Articles:

- [Guide to \(WYSIWYG\) Editor](#)
- [Supported File Types](#)
- [How to Access Revision History](#)

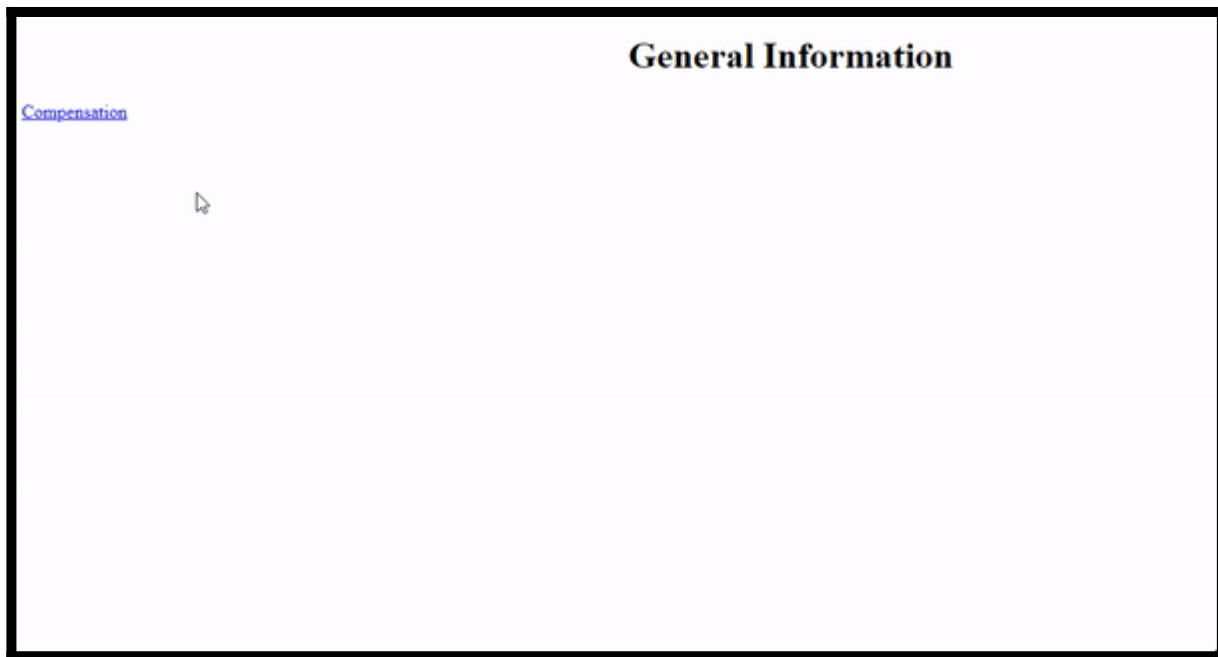
# How to Add a Lightbox

A lightbox is a JavaScript overlay. Lightboxes are great for displaying additional content. Lightboxes are not pop-ups; rather, they are overlays on the current page. Sites like Facebook and Amazon make heavy use of lightboxes to display content. You must copy and paste a small code snippet to add a lightbox to your website or application.

**Lightbox is beneficial in the following use cases:**

- The lightbox can display specific information from a private knowledge base to an external webpage for the general user.
- It is effective when you don't want users to load additional pages as the user need not always be directed to another page.

**This is how a lightbox appears on your webpage.**



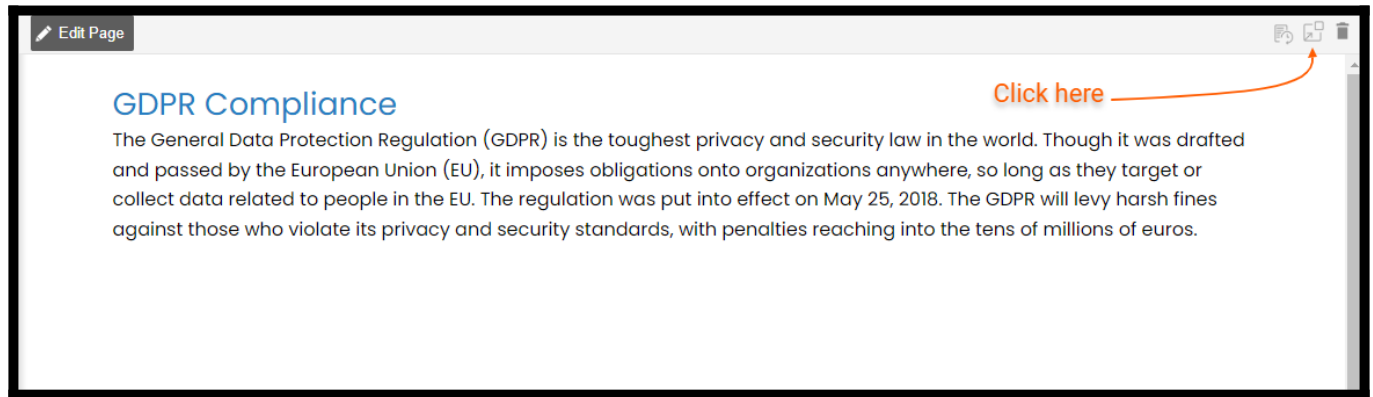
**In this article, you'll learn:**

- [How to Add a Lightbox to Your Site](#)
- [How to Add Multiple Lightboxes to a Webpage](#)

## How to Add a Lightbox to Your Site

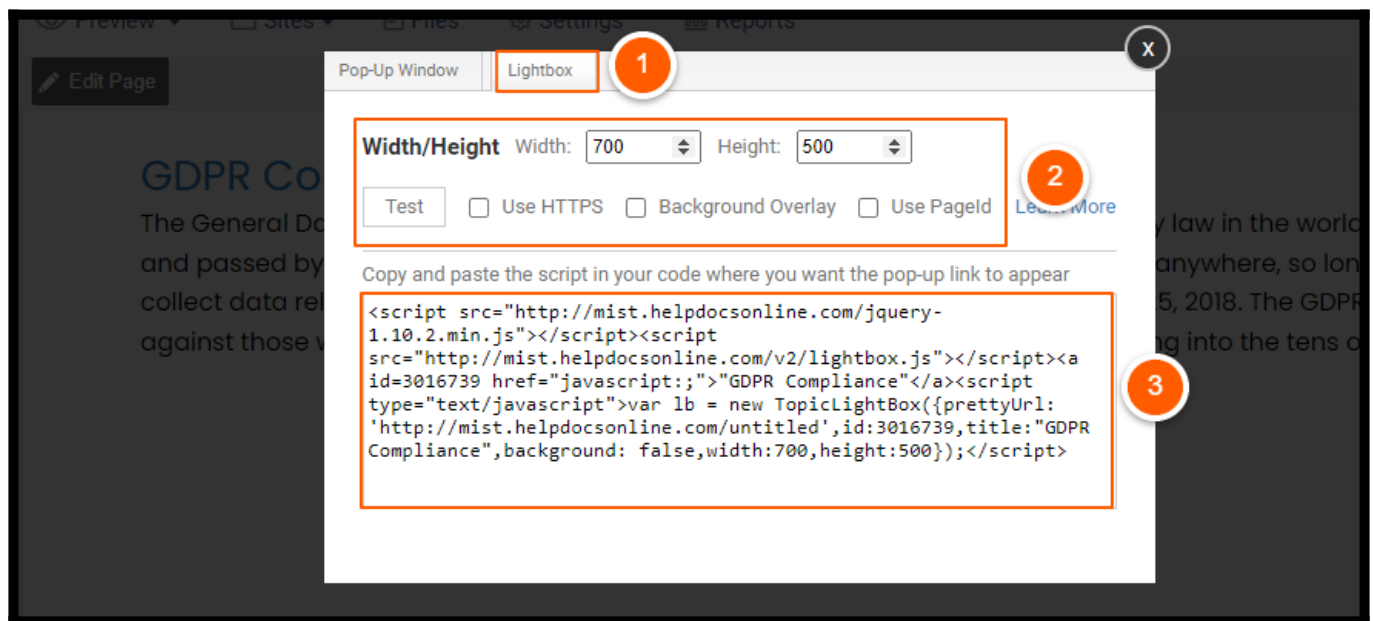
In your PropProfs Knowledge Base Editor,

**Step 1:** Navigate to the **page/folder** you wish to add to the lightbox.



**Step 2:** In the Lightbox tab.

- **Specify** the width and height.
- If required, check the **“Use HTTPS,” “Background Overlay,”** and **“Use Page ID”** options.
- Copy the **JavaScript** code.



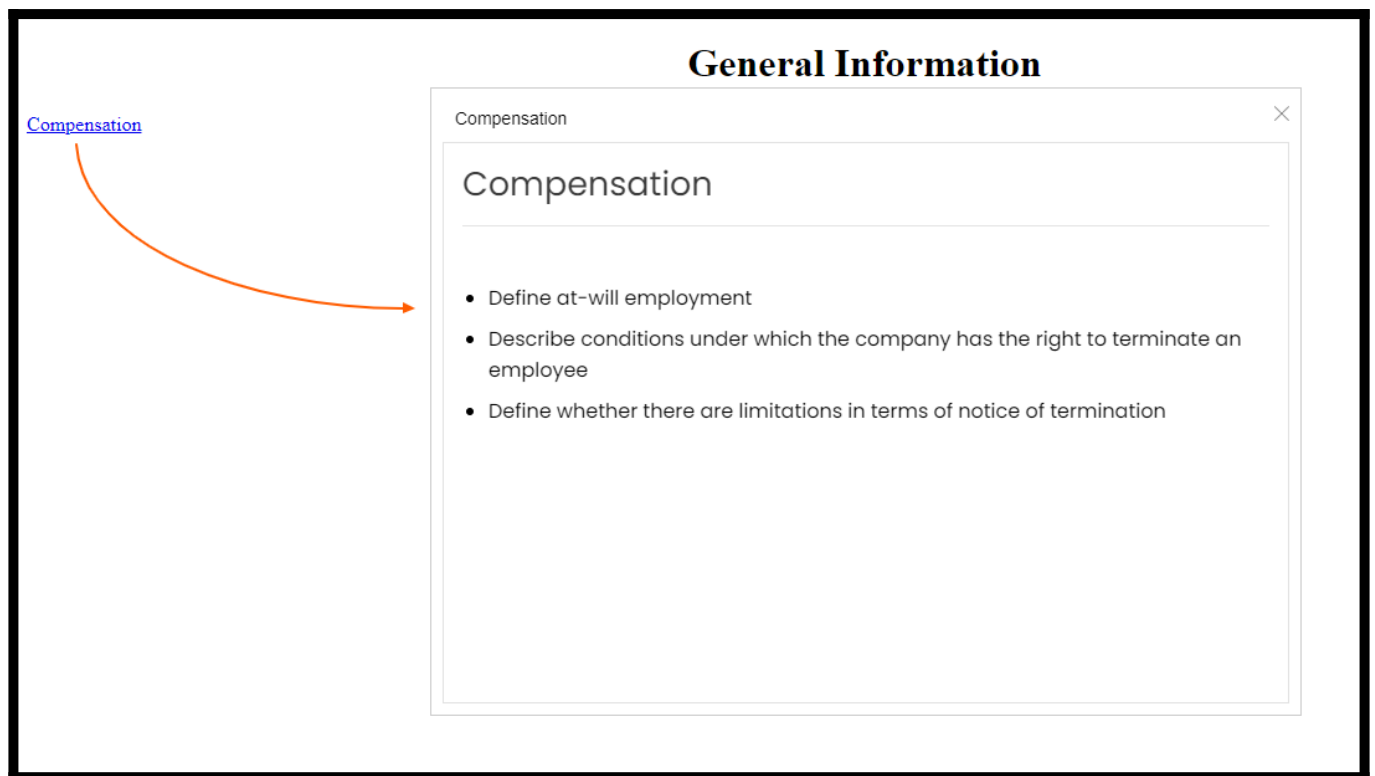
**Note:** Click **Test** to see how the lightbox appears on your page.

**Step 3:** Open the **page editor** of the website on which you want to display the Lightbox.

**Step 4:** Paste the **code** into the **HTML editor** and save the changes.

```
lightbox.html > html > head
4   <meta charset="UTF-8">
5   <meta http-equiv="X-UA-Compatible" content="IE=edge">
6   <meta name="viewport" content="width=device-width, initial-scale=1.0">
7   <title>KB Lightbox</title>
8 </head>
9 <body>
10  <h1 style="text-align:center;">General Information</h1>
11
12  <!-- <p>Lightbox: Compensation </p> -->
13 <p>
14  <script src="http://mist.helpdocsonline.com/jquery-1.10.2.min.js"></script><script src="http://mist.
    helpdocsonline.com/v2/lightbox.js"></script><a id=2950864 href="javascript:;">Compensation</a><script
    type="text/javascript">var lb = new TopicLightBox({prettyUrl: 'http://mist.helpdocsonline.com/
    compensation',id:2950864,title:"Compensation",background: false,width:700,height:500});</script>
15 </p>
16 </body>
17 </html>
```

A link will appear on your webpage. Click to **open** the lightbox.



## Understanding Lightbox Settings

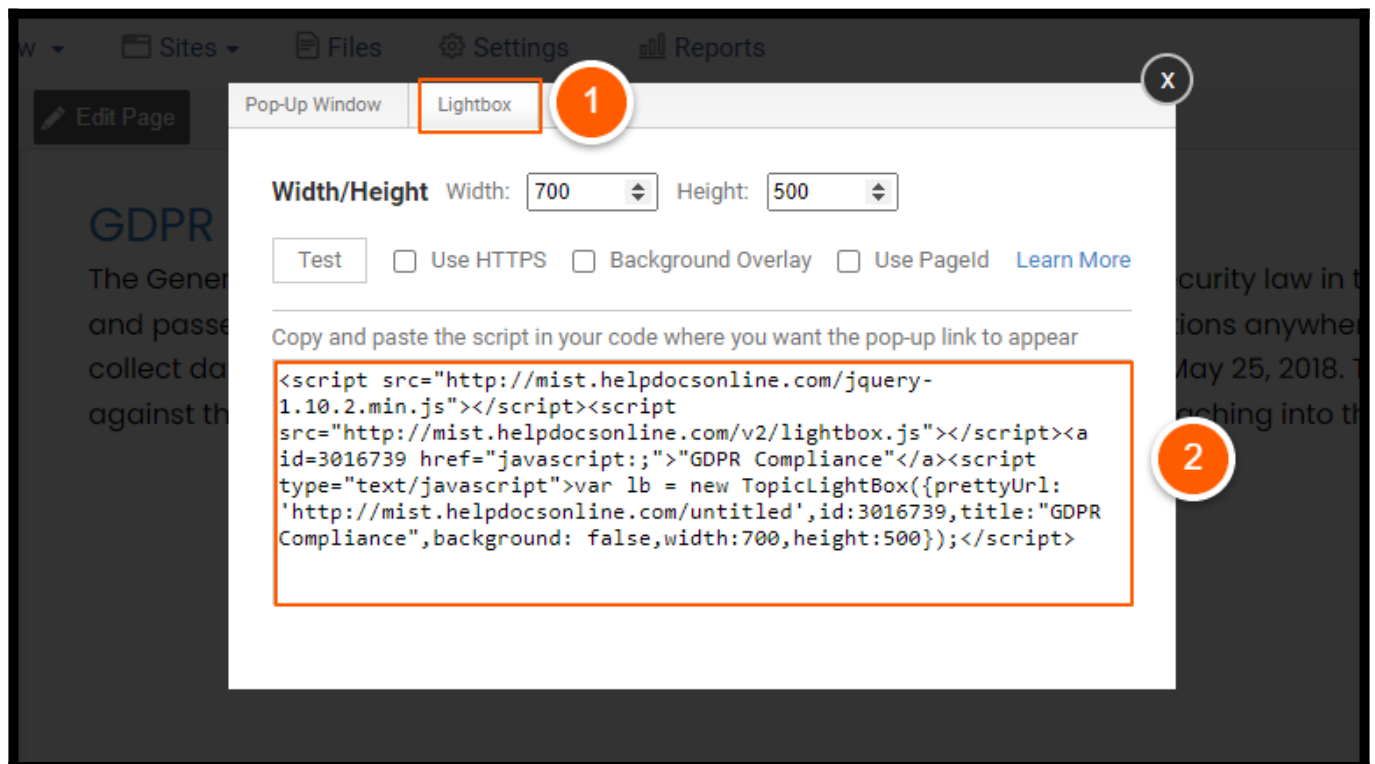
- **Width** specifies the width of the lightbox window. The default is 500 pixels.
- **Height** specifies the size of the lightbox window. The default is 700 pixels.
- **Use HTTPS** when your website or web application runs on - https:// (SSL). This will update

the link in the code from http:// to https://

- **Background Overlay:** Click if you want the lightbox to have a transparent (80%) background overlay color.
- **Use Page ID:** The embed code, by default, will use the page's URL. However, if you change the page URL later, the lightbox will no longer work. You can prevent this using the page ID, as it will never change. Hence, it becomes an ideal option if you plan on changing the page URL later.

## How to Add Multiple Lightboxes to a Webpage

**Step 1:** Open the **Lightbox** tab. Select and **copy** the **code** snippet.

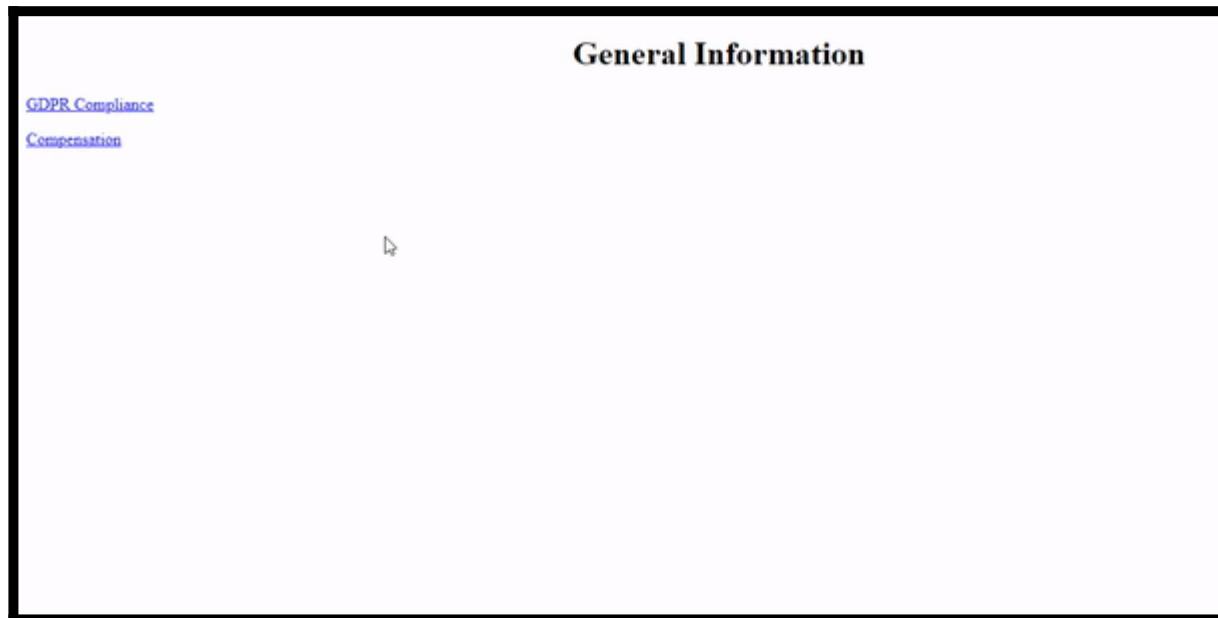


**Step 2:** Open the **page editor** of the website on which you want to display the Popup window.

**Step 3:** Paste the **JavaScript** for multiple popups which you have selected. **Save** the changes.

```
lightbox.html X
lightbox.html > html > body
1 <!DOCTYPE html>
2 <html lang="en">
3 <head>
4   <meta charset="UTF-8">
5   <meta http-equiv="X-UA-Compatible" content="IE=edge">
6   <meta name="viewport" content="width=device-width, initial-scale=1.0">
7   <title>KB Lightbox</title>
8 </head>
9 <body>
10   <h1 style="text-align:center;">General Information</h1>
11   <!-- <p>Lightbox:Compliance </p> -->
12 <p>
13   <script src="http://mist.helpdocsonline.com/jquery-1.10.2.min.js"></script><script src="http://mist.
14     helpdocsonline.com/v2/lightbox.js"></script><a id=3016739 href="javascript:;">GDPR Compliance</a><script
15     type="text/javascript">var lb = new TopicLightBox({prettyUrl: 'http://mist.helpdocsonline.com/untitled',
16       id:3016739,title:"GDPR Compliance",background: false,width:700,height:500});</script>
17 </p>
18   <!-- <p>Lightbox: Compensation </p> -->
19 <p>
20   <script src="http://mist.helpdocsonline.com/jquery-1.10.2.min.js"></script><script src="http://mist.
21     helpdocsonline.com/v2/lightbox.js"></script><a id=2950864 href="javascript:;">Compensation</a><script
    type="text/javascript">var lb = new TopicLightBox({prettyUrl: 'http://mist.helpdocsonline.com/
    compensation',id:2950864,title:"Compensation",background: false,width:700,height:500});</script>
  </p>
</body>
</html>
```

This is how the multiple lightboxes will appear on your webpage.



*This is all about adding lightboxes to web pages.*

## Related Articles:

- [What are Callouts?](#)
- [Add a Popup](#)
- [Create a Tooltip](#)

# How to Add a Popup Window

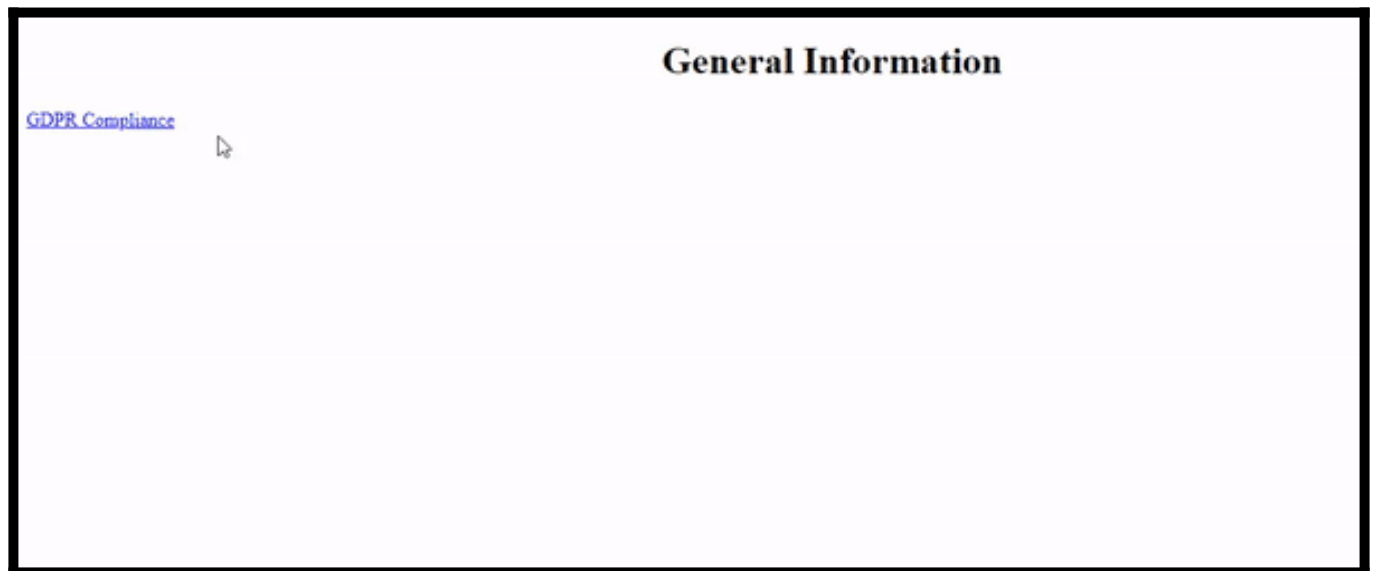
Popup lets you display information from an external webpage to your webpage in a new web browser pop-up window. In the ProProfs Knowledge Base, you can add a popup by copying the code snippet of the selected page and pasting it into the source code of your webpage.

These are **not the old-school pop-up windows** we all used to fear, the ones that triggered pop-up blockers. Instead, this new pop-up window is safe and secure and uses a small piece of JavaScript that will open a page with a specific window width and height.

## Benefits of popup window:

- It saves you time and effort from creating a separate page.
- Displays the information in the same window, keeping the users focussed

Here is how a popup appears on your webpage:



In this article, you will learn:

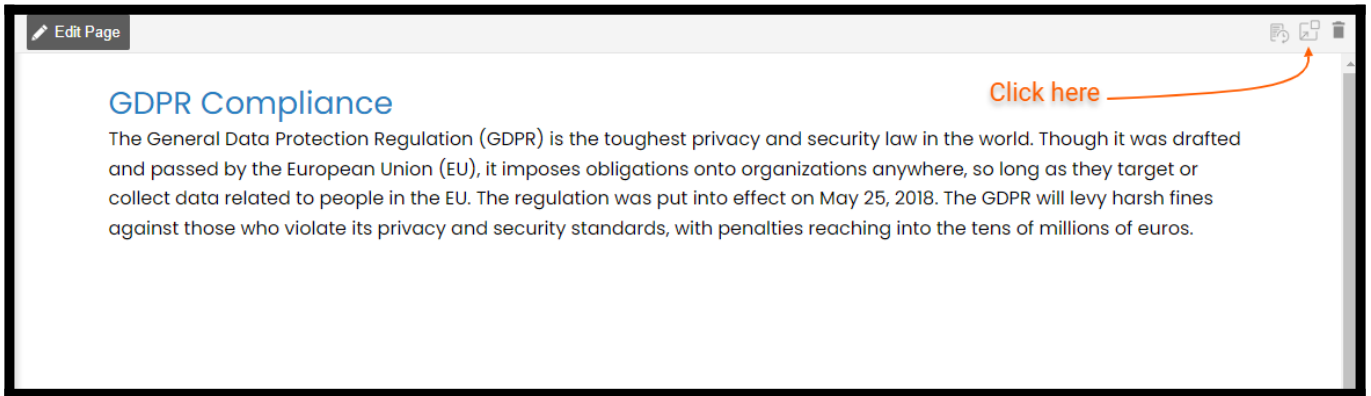
1. [How to Add a Popup Window](#)
2. [How to Add Multiple Popups](#)

## How to Add a Popup Window

In your ProProfs Knowledge base editor:

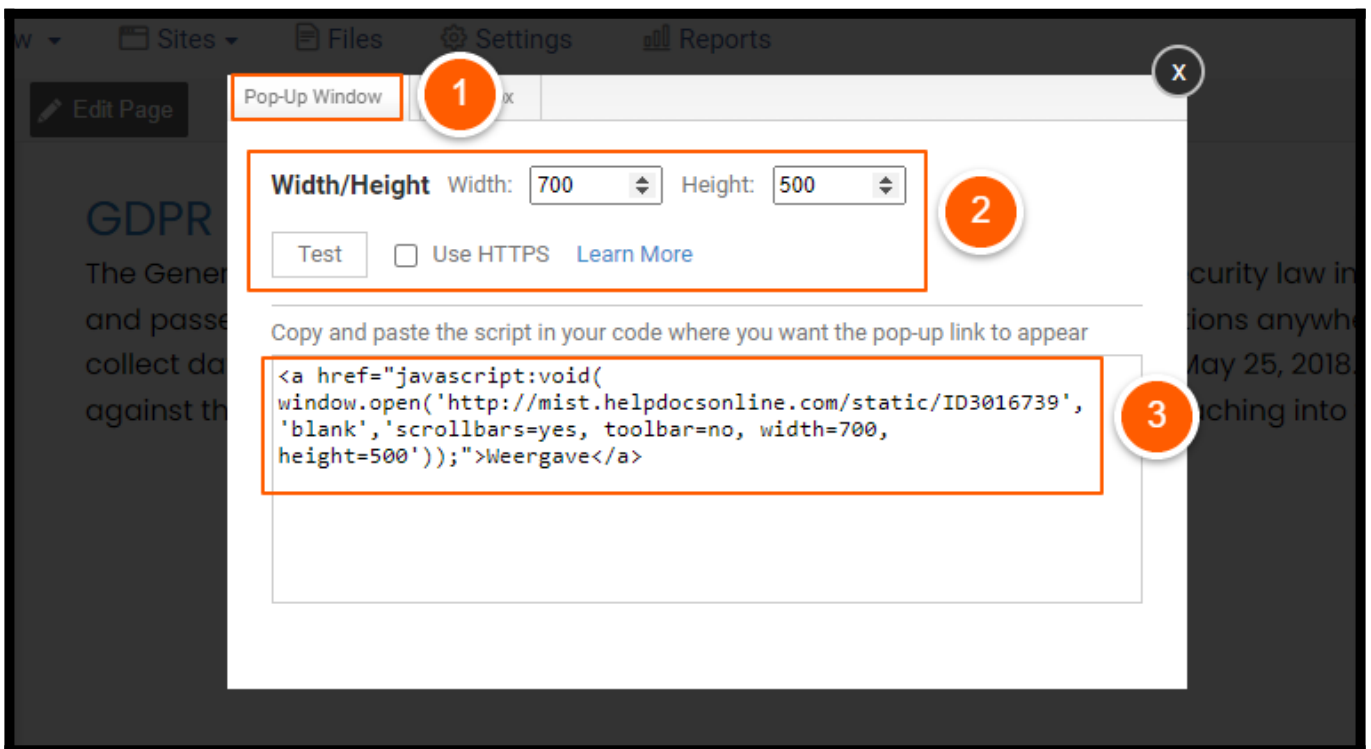
**Step 1:** Navigate to the page/folder you wish to add to the popup window.





## Step 2: In the Popup window tab

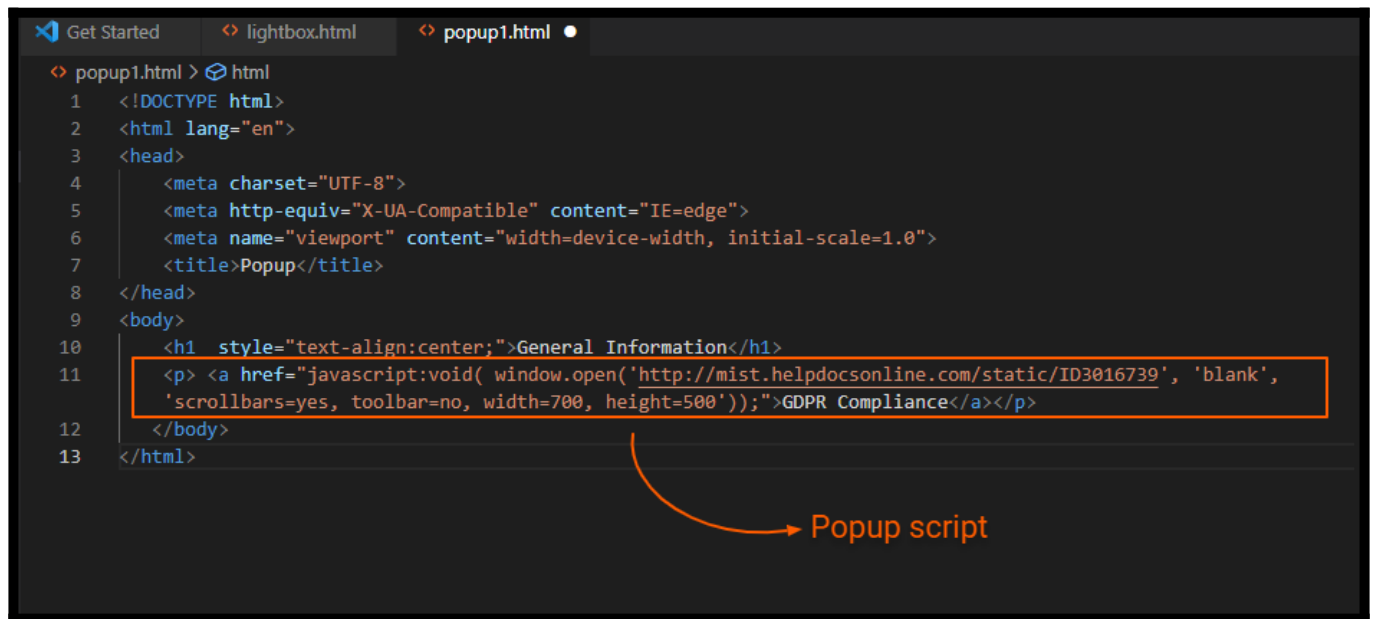
- Specify the **width** and **height**.
- Check the “**Use HTTPS**” option, if required
- Copy the **JavaScript code**.



**NOTE:** Click **Test** to see how the Popup appears on your page.

**Step 3:** Open the **page editor** of the website on which you want to display the Popup window

**Step 4:** Paste the **code** into the **HTML editor** and save the changes



```
1 <!DOCTYPE html>
2 <html lang="en">
3 <head>
4   <meta charset="UTF-8">
5   <meta http-equiv="X-UA-Compatible" content="IE=edge">
6   <meta name="viewport" content="width=device-width, initial-scale=1.0">
7   <title>Popup</title>
8 </head>
9 <body>
10  <h1 style="text-align:center;">General Information</h1>
11  <p> <a href="javascript:void( window.open('http://mist.helpdocsonline.com/static/ID3016739', 'blank',
12    'scrollbars=yes, toolbar=no, width=700, height=500'));">GDPR Compliance</a></p>
13 </body>
</html>
```

Popup script

The Popup window will appear on the page like this.

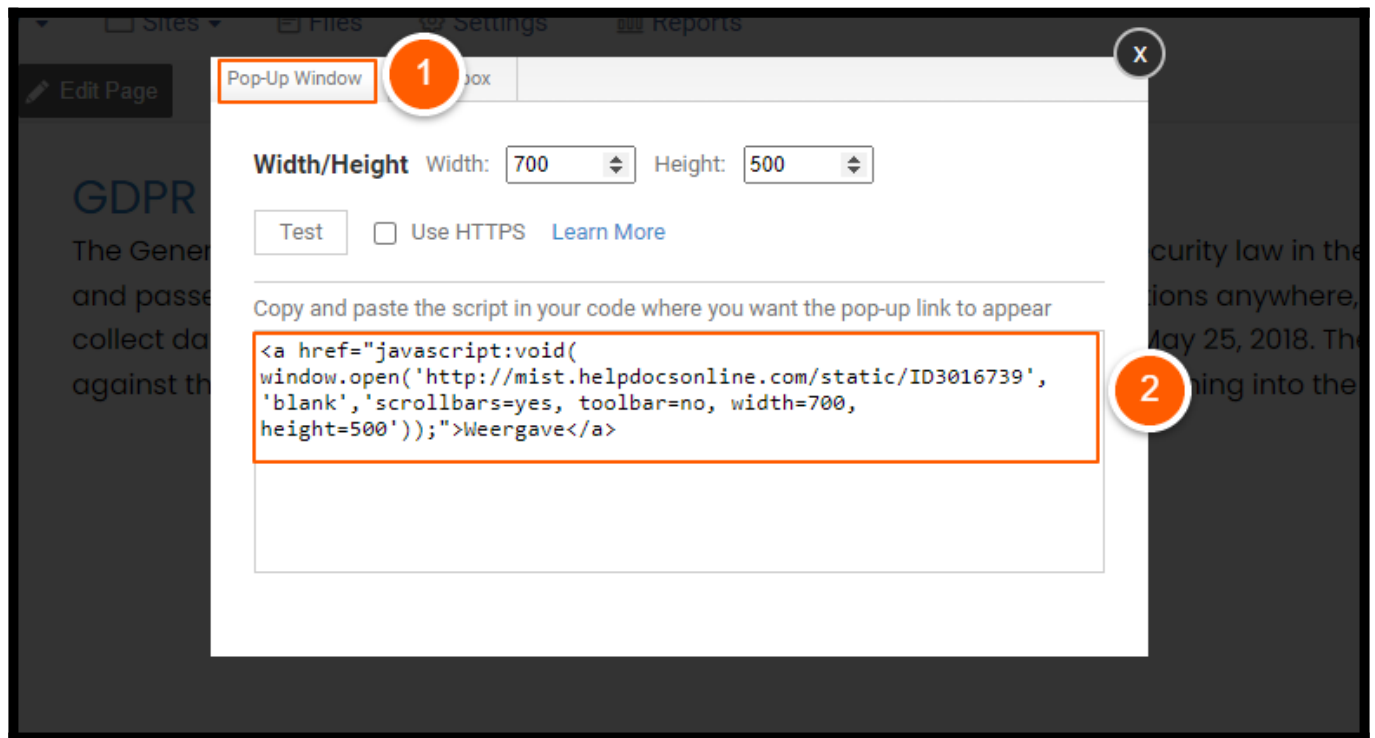


**NOTE:** The Popup will appear only when the user clicks the link.

## How to Add Multiple Popups to a Webpage

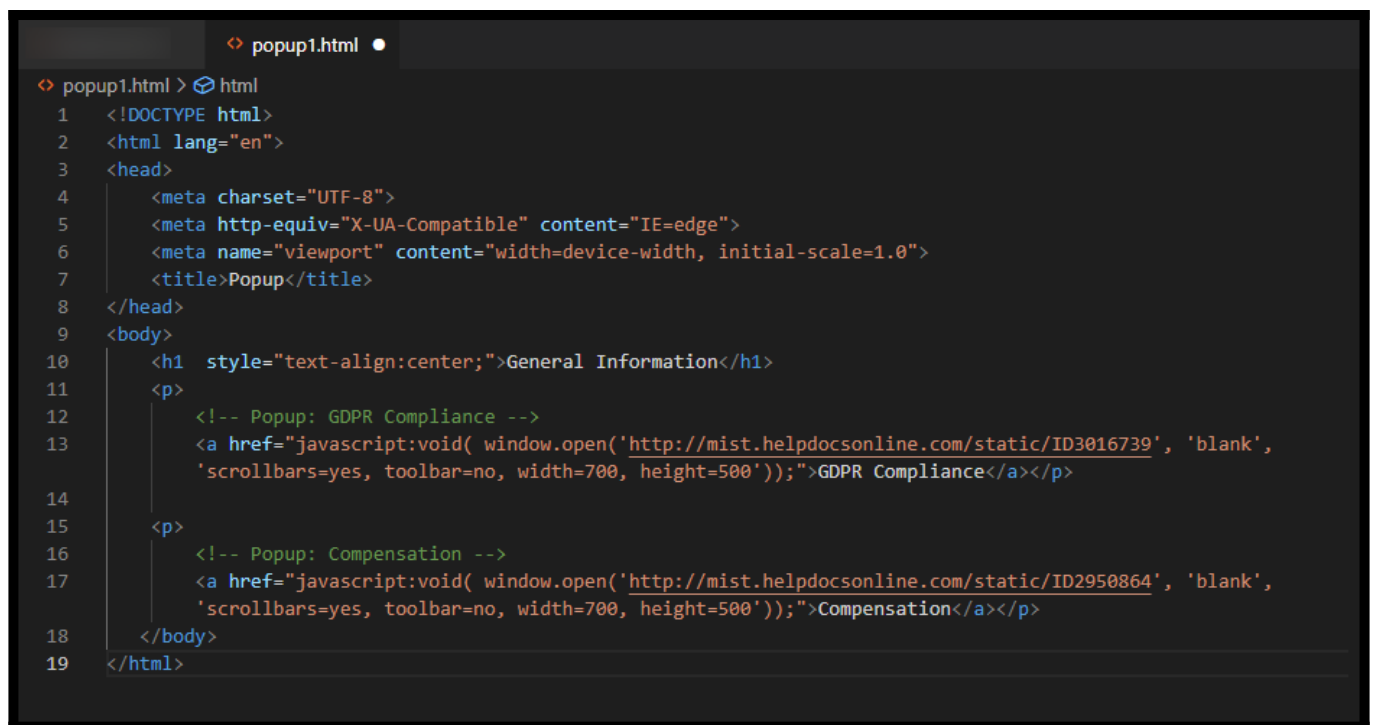
In your Proprofs Knowledge Base editor:

**Step 1:** Open the Popup window tab. **Select** and **copy** the **code snippet**.

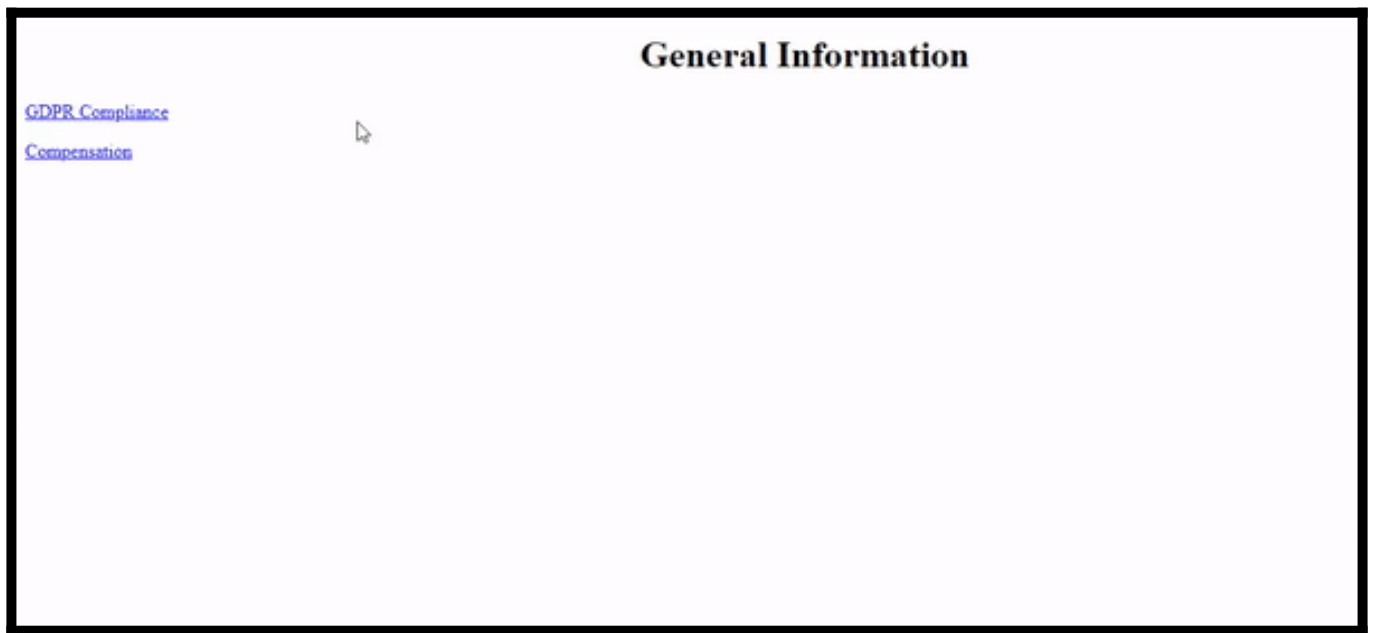


**Step 2:** Open the **page editor** of the website on which you want to display the Popup window

**Step 3:** Paste the **Javascript** for multiple popups which you have selected. Save the changes.



Multiple popups will appear on your page like this.



*That is all about adding popups to your webpage.*

### Related Articles

- [Callouts](#)
- [Add a Lightbox](#)
- [Create a Tooltip](#)

# Working With Images

In Proprofs Knowledge Base, you can easily add images with multiple upload options and customize them to make help articles visually appealing for a better user experience. Images and screenshots add more details to your help pages and give users a better understanding.

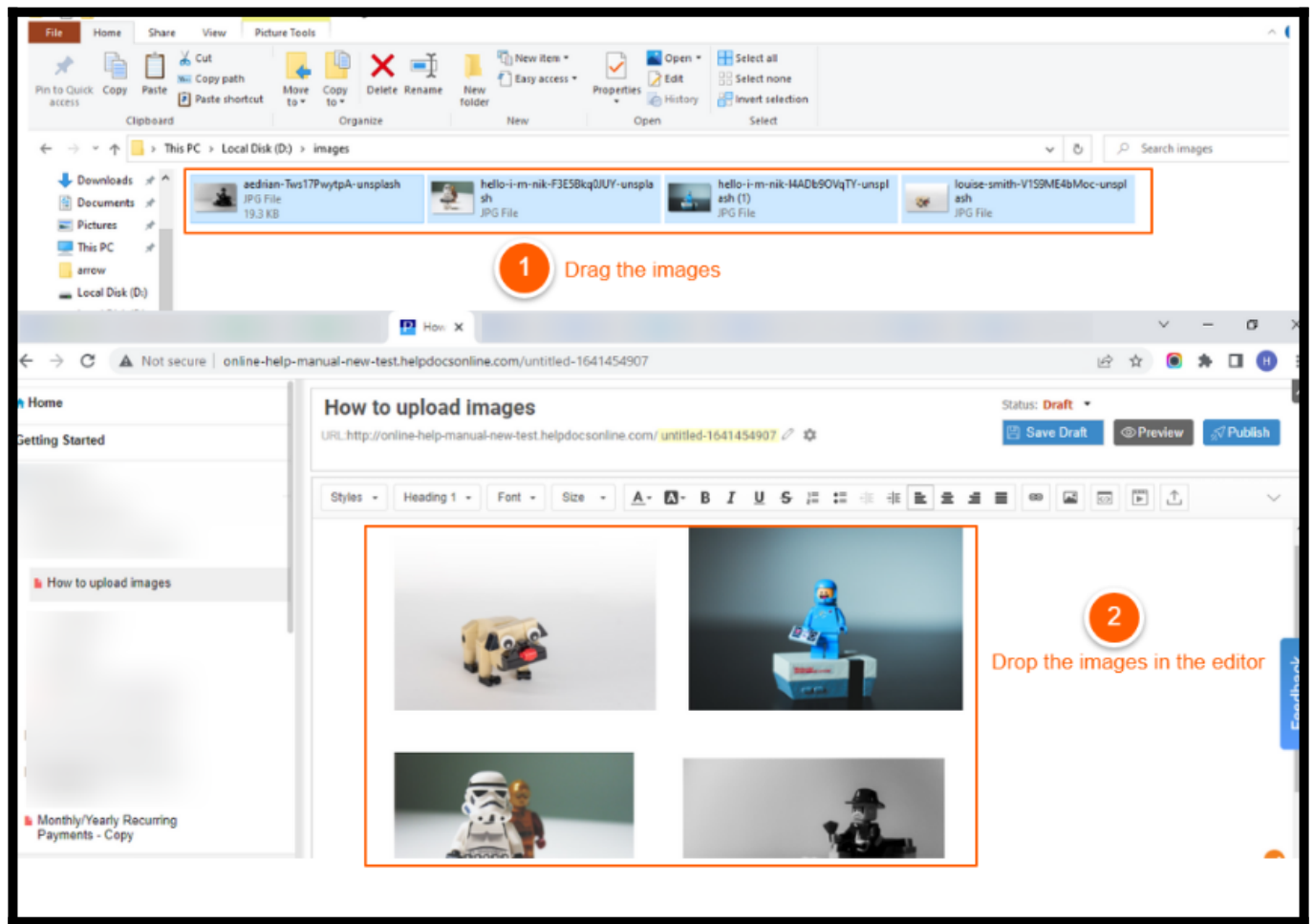
**In this article, you will learn how to:**

- [Drag and Drop](#)
  - [Copy and Paste Upload](#)
  - [Resizing Image](#)
  - [Uploading an Image](#)
  - [The Advanced Option](#)
  - [File Manager](#)
  - [Image Lightbox](#)
- 

## How to Upload Images using the Drag and Drop method

**Step 1:** Select the image(s) from the file location.

**Step 2:** Drag the selected images and drop them in your browser's ProProfs Knowledge Base editor tab.

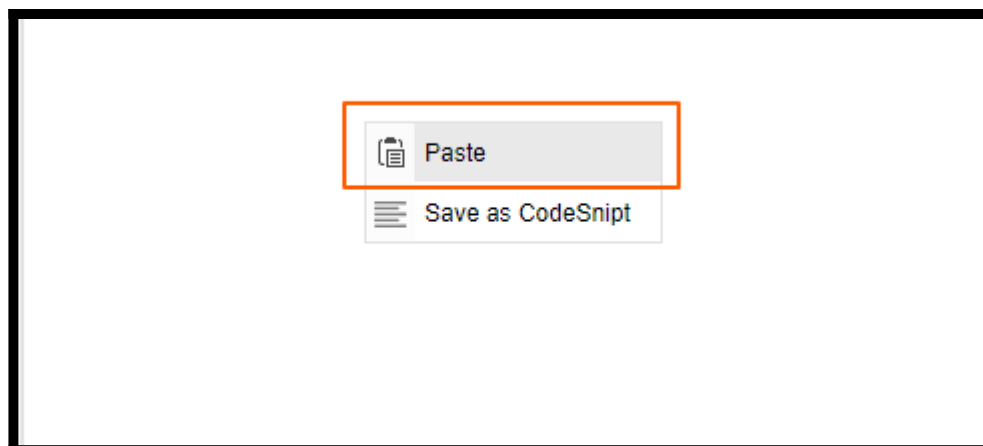


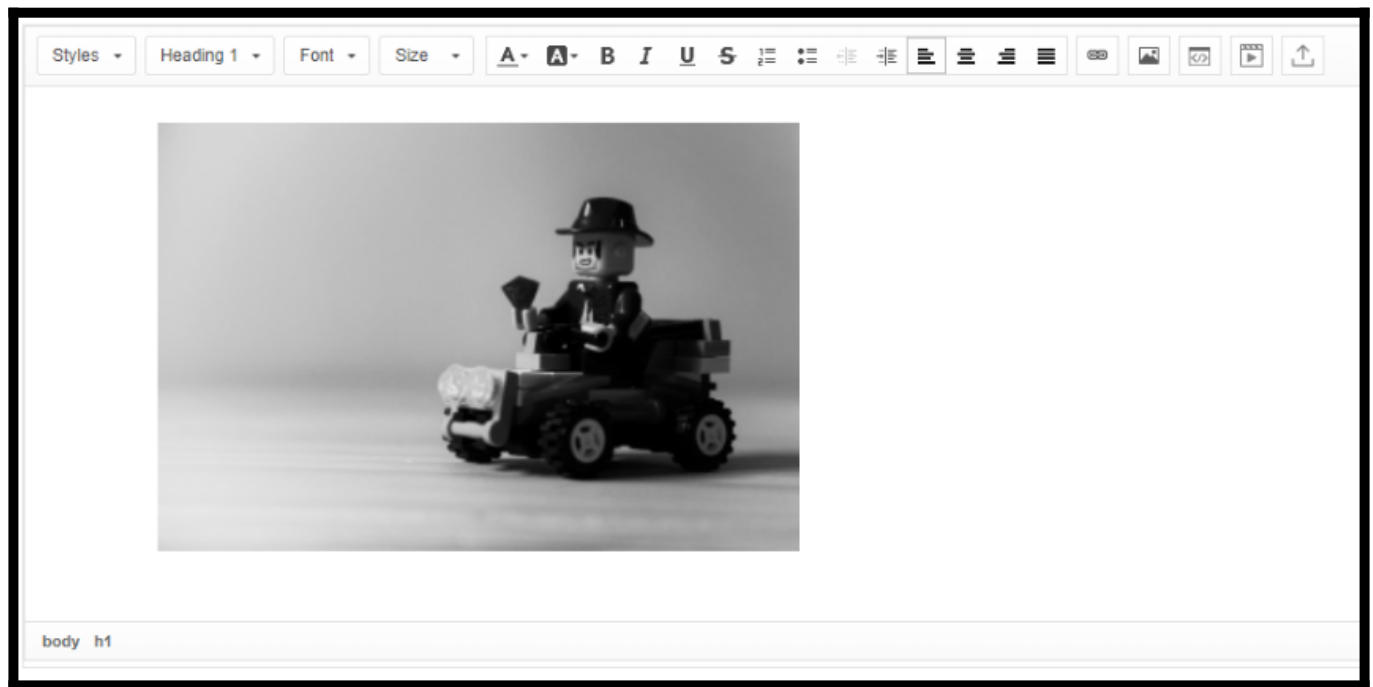
This feature works only with the stable Firefox, Chrome, Edge, and Safari versions.

## How to Copy and Paste Images

**Step 1:** Right Click on the image and select copy. Or else, you can use **CTRL+C** to copy the image.

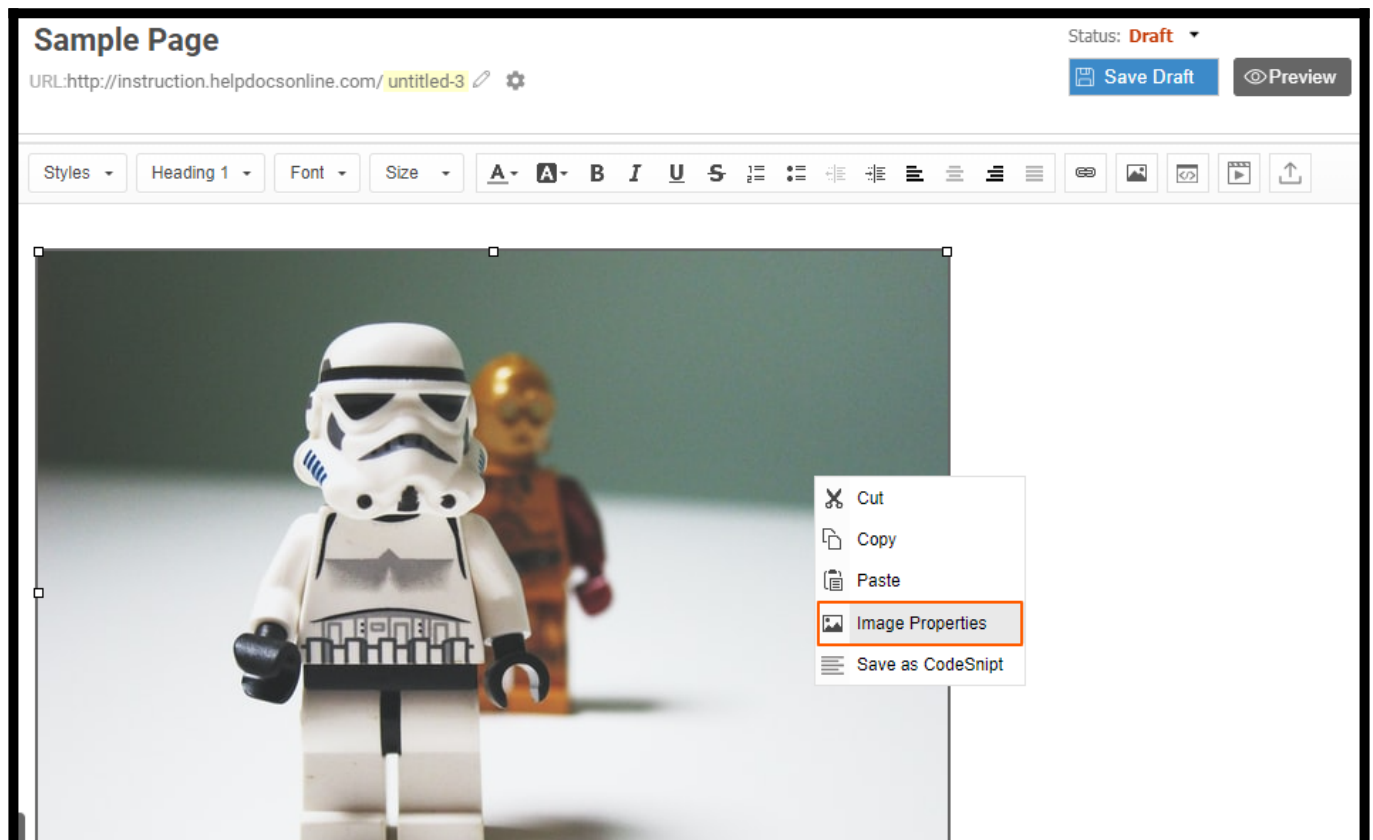
**Step 2:** Use right-click to paste the image into the Knowledge Base editor. Or you can simply press **CTRL+V**.





## How to Resize Images

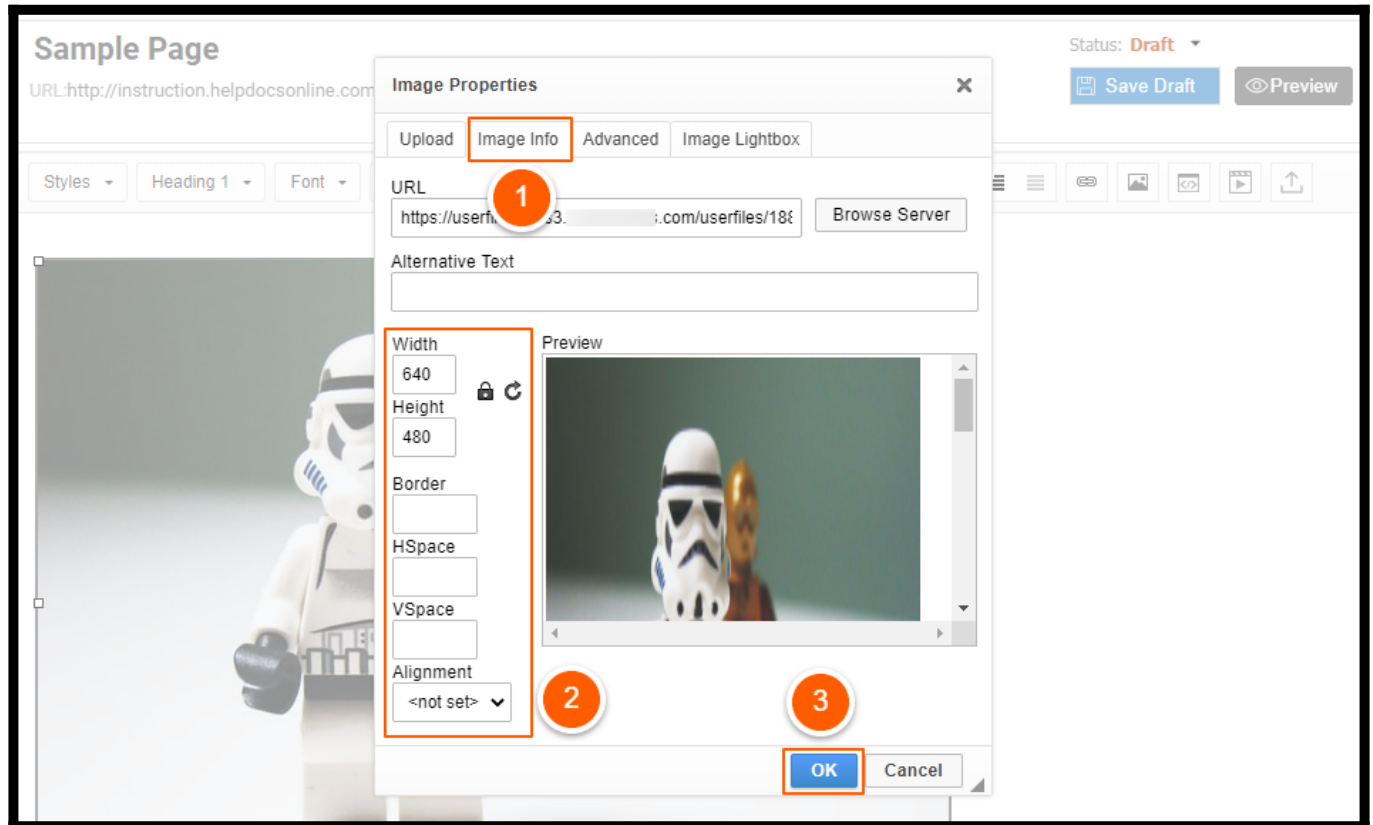
**Step 1:** Right-click on the image and select “Image Properties.”



**Step 2:** Switch to the **Image Info** tab.

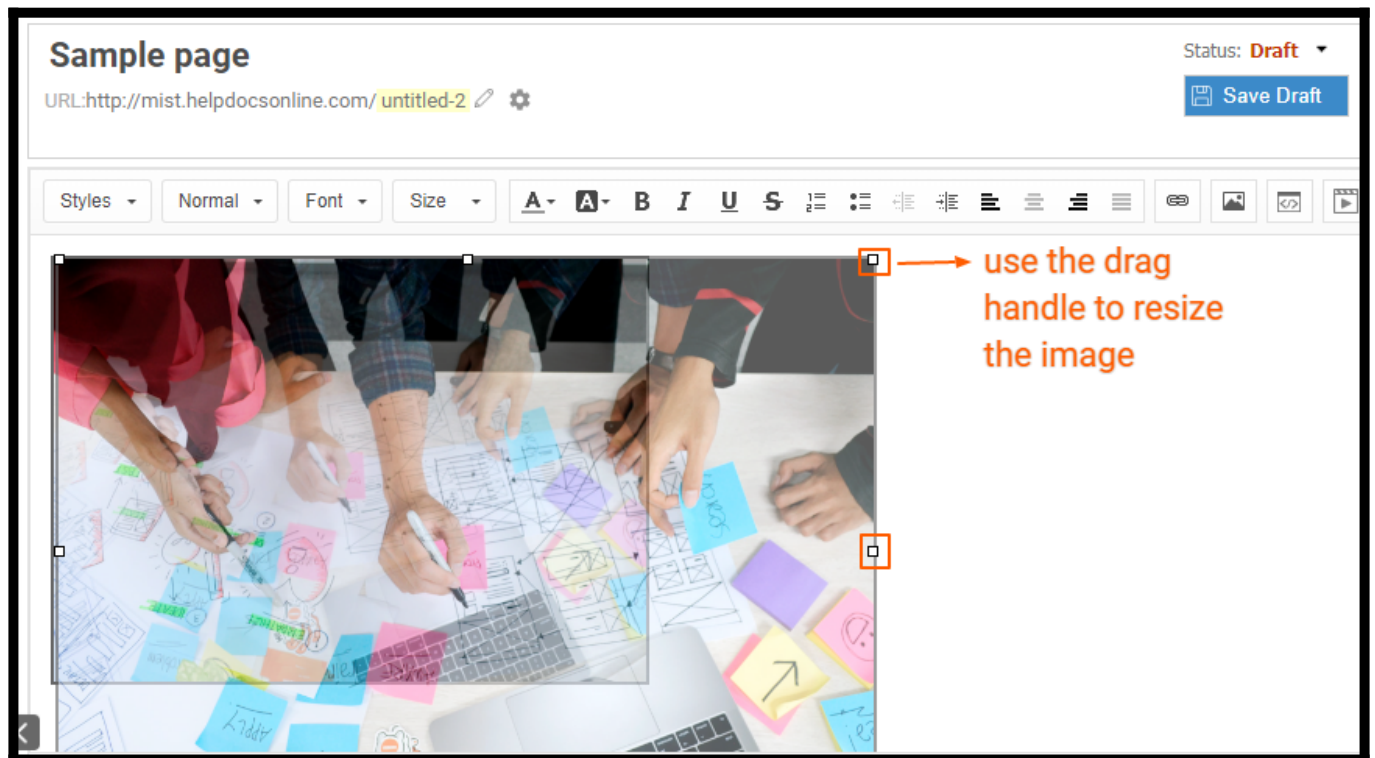
**Step 3:** Enter the custom value to change the width, height, and other attributes.

**Step 4:** Click **OK**.



Alternatively, you can also click the image and use the drag handles to resize the image.





Here is a short description of all Image Info tab elements:

- **URL** – This is the image's web address if it is located on an external server. Use the full absolute path, for example, <http://example.com/img.jpg>.
- **Browse Server** – If the image has already been uploaded to your image library, you can browse the server and select the image.
- **Alternative Text** – This short image description is for users with assistive devices (such as screen readers).
- **Width** – This sets the width of the image in pixels. By default, this is set to the original image's width.
- **Height** – This sets the height of the image in pixels. By default, this is set to the original image's height.
- **Border** – This sets the size of the solid border around the image in pixels.
- **"HSpace"** sets the horizontal spacing (or margin) between the image border (if present), the image itself, and other document elements surrounding the image in pixels.
- **"VSpace"** sets the vertical spacing (or margin) between the image border (if present), the image itself, and other document elements surrounding the image in pixels.
- **Alignment** – This sets the alignment of the image in the document. Available options are Right and Left.
- **Preview** – This provides a preliminary view of the selected image, formatted according to the

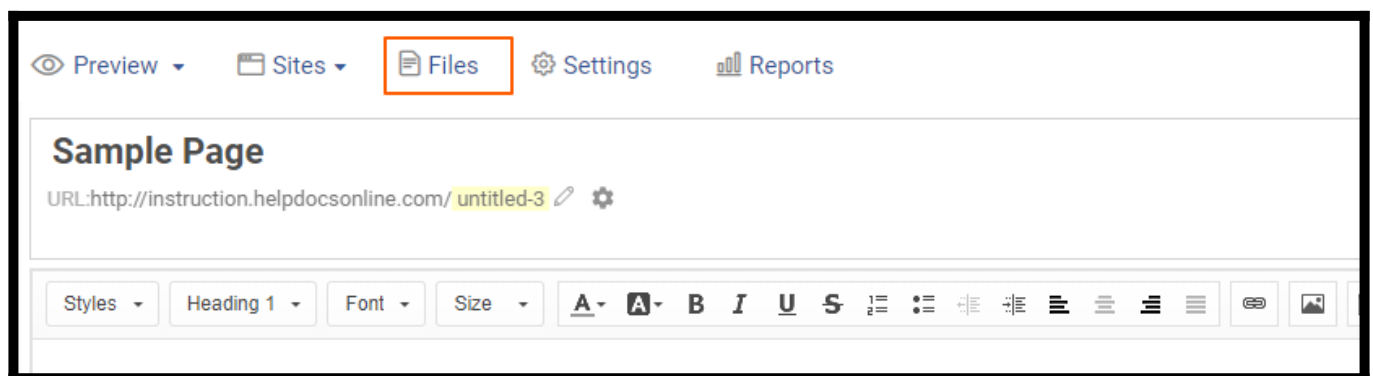
options chosen on the left.

By default, the image ratio is locked, which you can see by the button. When you change one of the size values (width or height), the other one will be adjusted automatically.

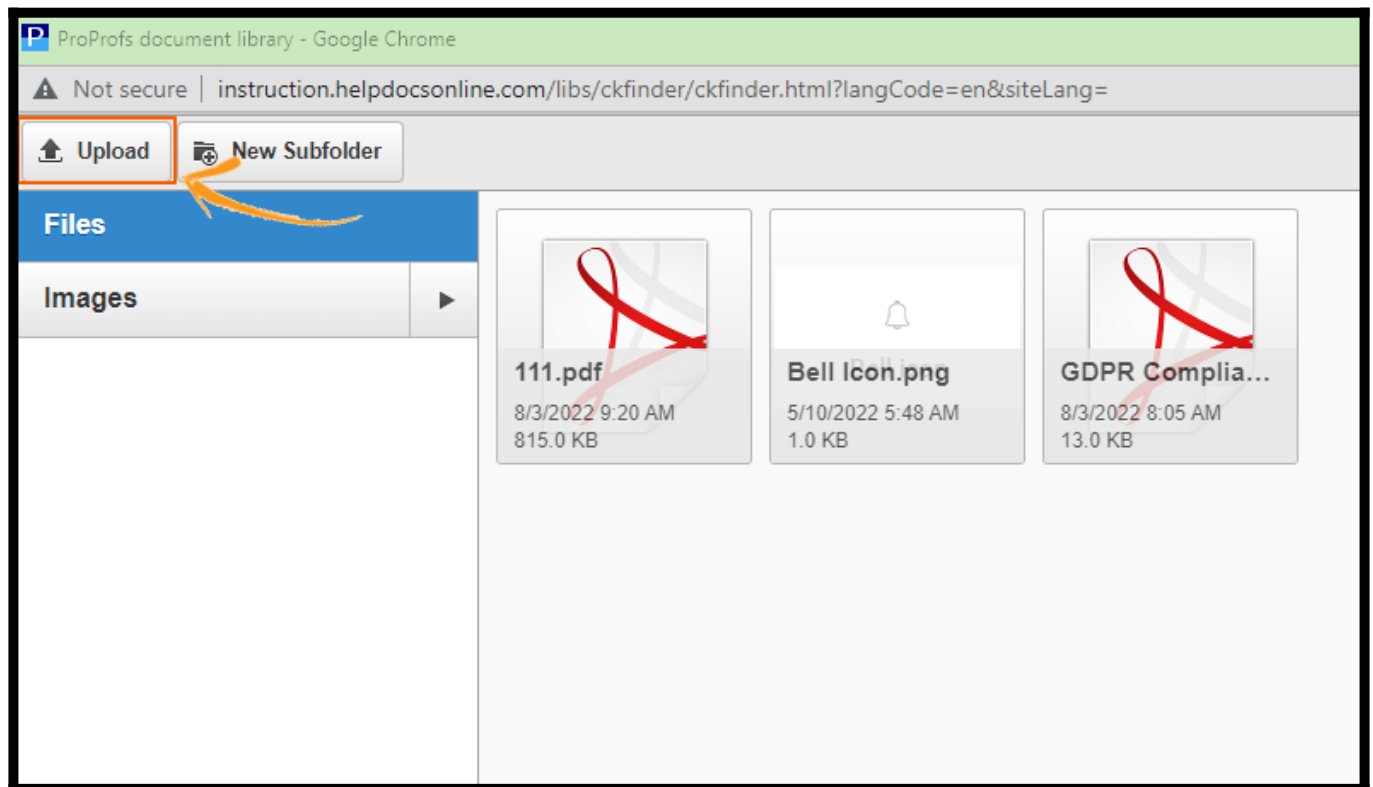
If you want to modify both dimensions freely, click the button to unlock the image ratio. The button will now change, and modifying one dimension will not automatically cause the other one to be adjusted. To lock the image ratio again, click the button once more.

## How to Upload images to the Library

**Step 1:** In the navigation menu, click **Files**.

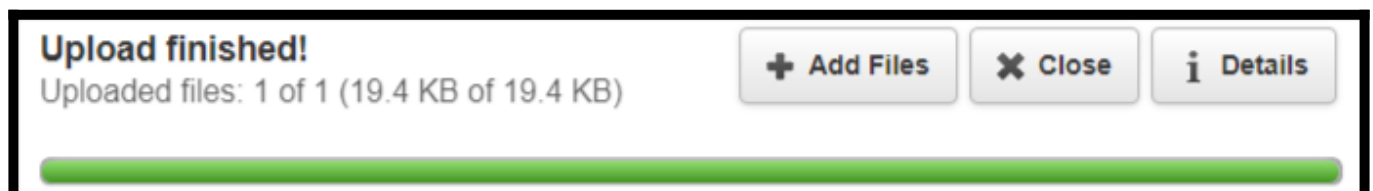


**Step 2:** Click the **Upload** button.

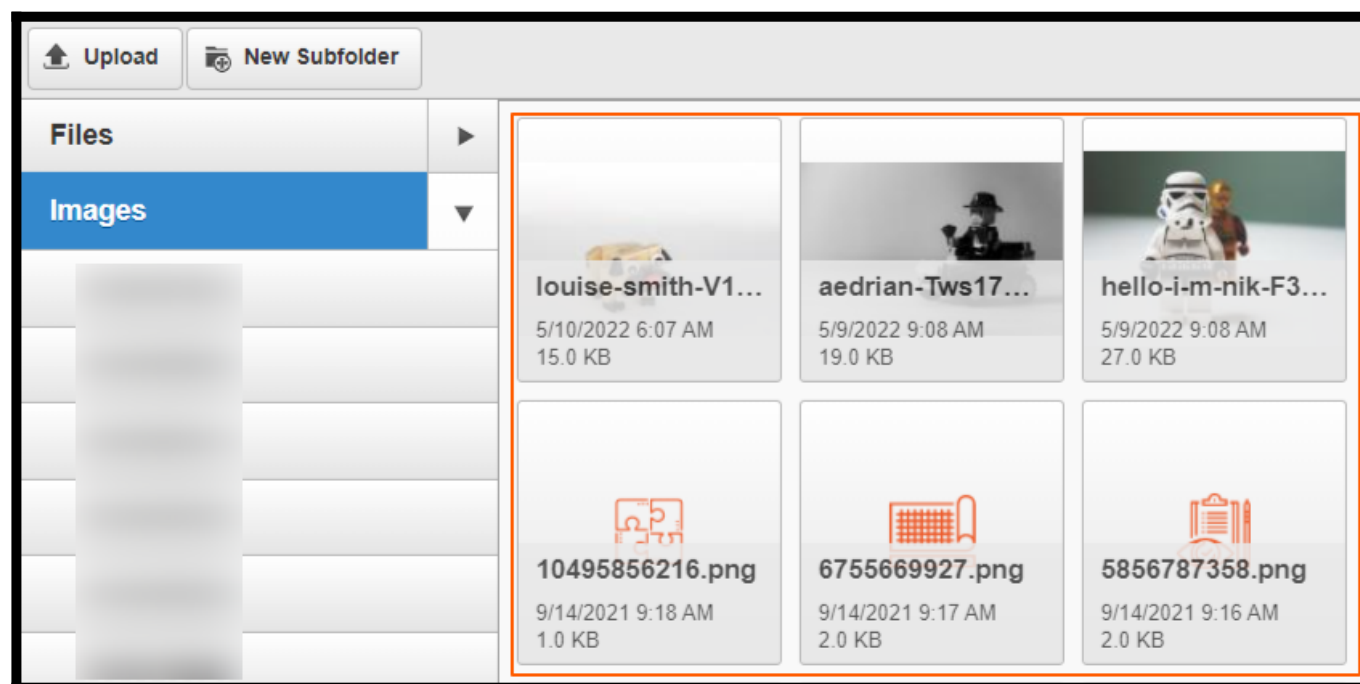


**Step 3:** Select the **image** from the file location.

You will get a confirmation upon successful image upload.



You can view the uploaded image in the image library.



## How to use the Advanced option

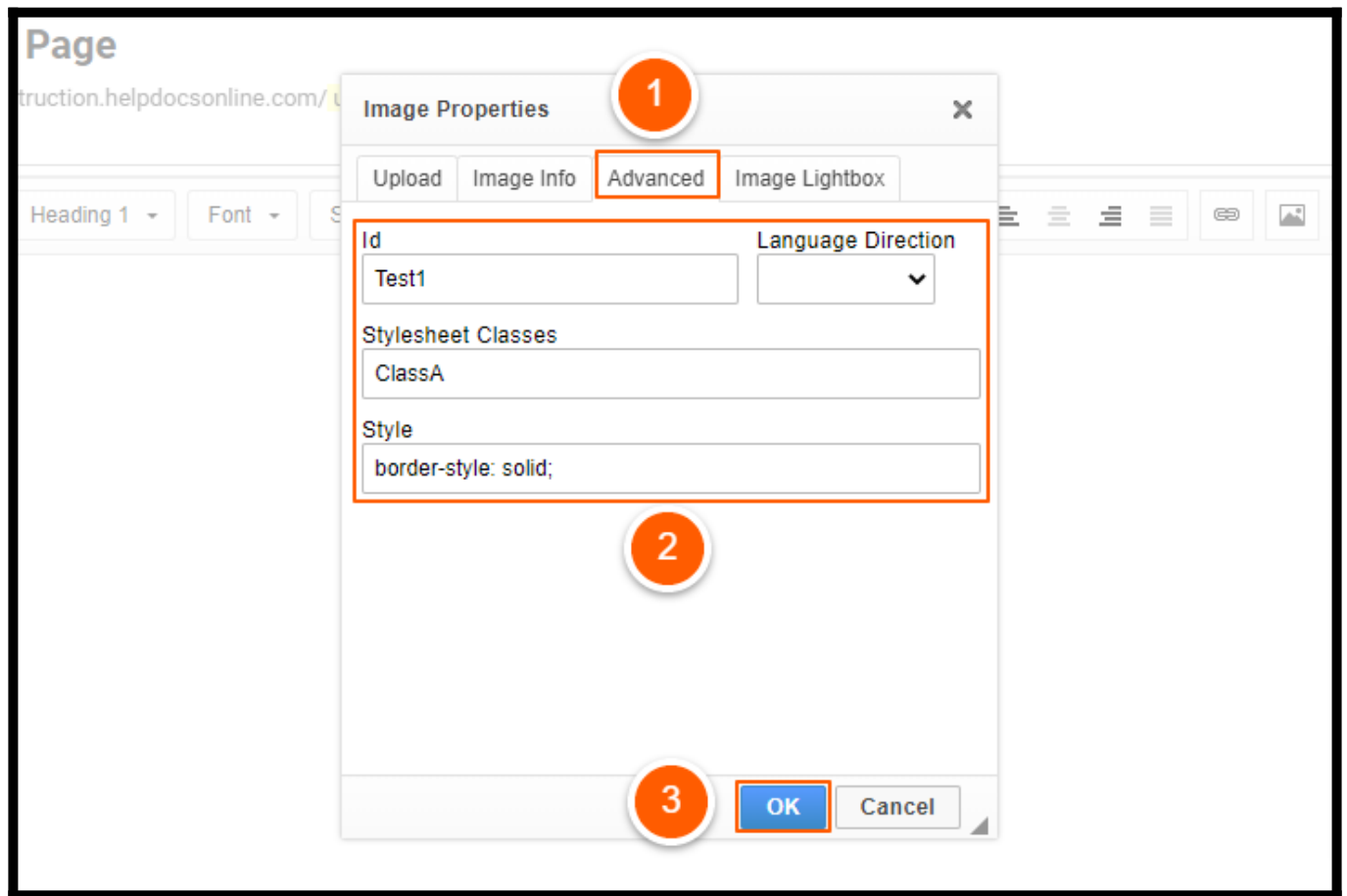
The **Advanced** tab lets you configure additional image options, such as assigning an ID, language direction, stylesheet classes, and style. It is for advanced users with knowledge of HTML and CSS.

**Step 1:** Go to the **Image Properties**.

**Step 2:** Switch to the **Advanced** tab.

**Step 3:** Enter **ID**, **Style**, and **Stylesheet Classes**. Select the **Language Direction**.

**Step 4:** Click **OK**.



Below is the overview of all Advanced tab elements:

- **Id** – This is a unique identifier for an image element in the page (id attribute).
- **Language Direction** – This controls the direction of the text: Left to Right (LTR) or Right to Left (RTL) (dir attribute).
- **Stylesheet Classes** – This is the class of the image element (class attribute). Note that an image element might be assigned more than one class. If this is the case, separate class names with spaces.
- **Style** – This is for CSS style definitions (style attribute). Each value must end with a semicolon, and individual properties should be separated with spaces.

## How to Use File Manager

If the image has already been uploaded to your file manager, you can browse the server and select the image.

The file manager is a central location of the files you have uploaded. You can browse, upload, and manage images here. Learn more about the [file manager](#).

# How to use the Image Lightbox

This feature allows you to add high-quality images to your pages and space optimization as you specify in thumbnails.

You can also place images in a group/gallery to easily navigate a collection of related images.

An image with a lightbox applied can be clicked to show the full or custom size of the image.

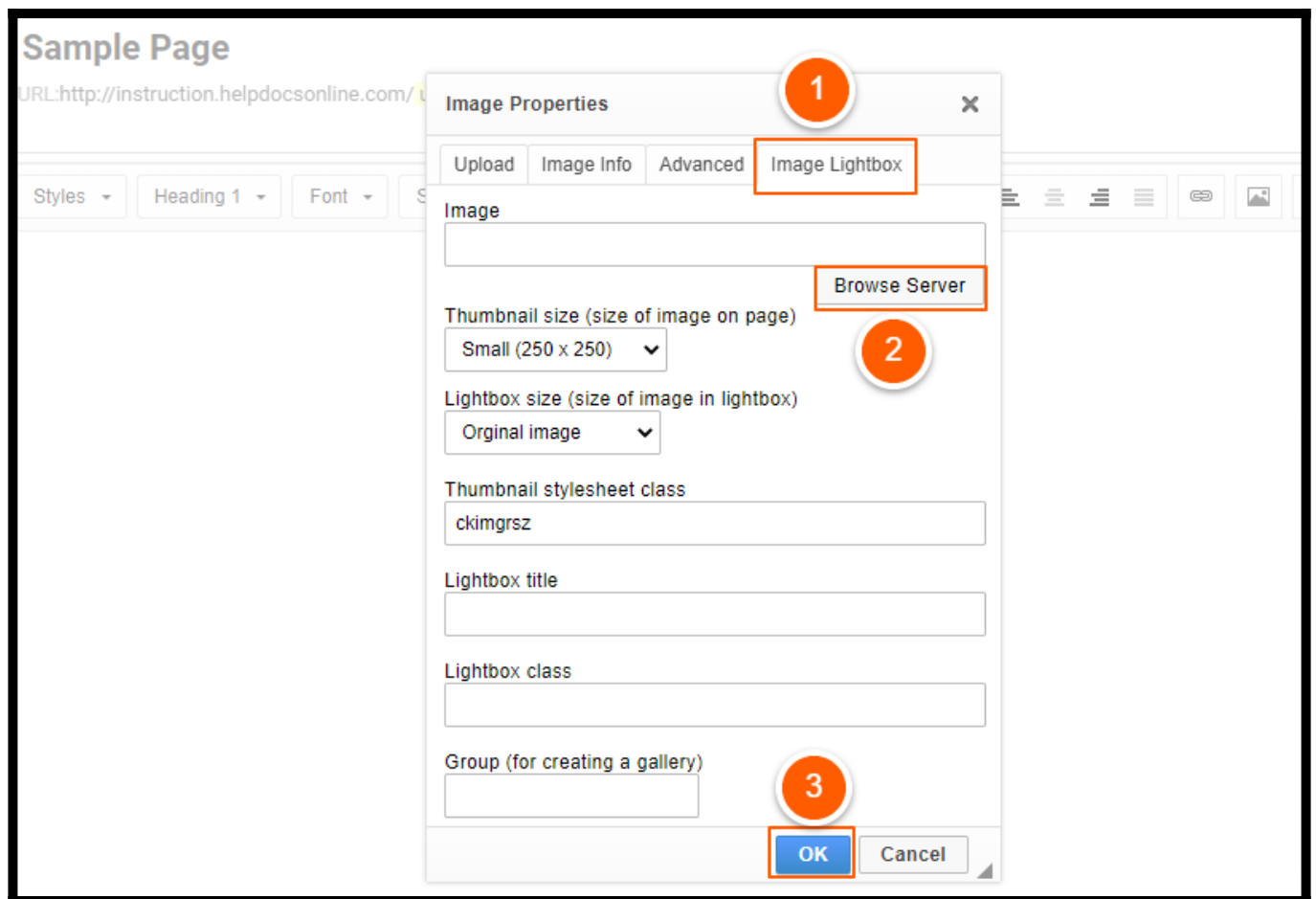
**Step 1:** Go to **Image Properties**.

**Step 2:** Switch to the **Image Lightbox** tab.

**Step 3:** Click **Browse Server** to select the image.

**Step 4:** Select the image options.

**Step 5:** Click **OK** to save changes.



Here is the description of all the Image Lightbox tab options:

- **Image** - This allows you to pick an image that exists in your File Manager.
- **Thumbnail size** (size of the image on the page) - specifies the size of your thumbnail when the page is viewed. You can select from small(250x250), medium(350x350), large(450x450), Original image, and Custom size. Additional fields will show when selecting a custom size,

allowing you to specify width and height.

- **Lightbox size** (size of the image in the lightbox) - This allows you to specify the size of the image when viewing it in a lightbox. You can select from the Original image, Lightbox (800x600), and Custom size. The lightbox wisely limits the full image size if it exceeds your browser's viewport dimensions making sure no scrollbar appears.
- **Thumbnail stylesheet class** - This allows you to add CSS class to your image element for further customization.
- **Lightbox title** - This allows you to specify the text that shows at the top of the Lightbox frame.
- **Group**(for creating a gallery) - This allows you to use a name for a group/gallery that the image will be a member of. Images on a page with lightbox applied and having the same group will allow the end-user to view other images in the group by using the navigation arrows in the lightbox frame.

*That is all about adding and customizing images in ProProfs Knowledge Base.*

#### Related Articles:

- [File & Image Manager](#)
- [Authors](#)
- [How to View All the Pages in the Knowledge Base](#)

# How to Add Tables to Help Articles

ProProfs Knowledge Base lets you add tables to showcase statistical information. Tables can enhance overall engagement and help users easily comprehend the data.

Adding tables allows you to display data correctly and make your help articles more interactive.

Here's what the table will look like in a help article:

**Step 4:** Lorem Ipsum has been the industry's standard dummy **Table** since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book.

Header 1	Header 2
Data 1	Data 2
Data 3	Data 4

*You can add,edit and delete row & column simply. Just right click on the table and select as action which you want to perform.*

**Step 5:** It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

This article covers the following:

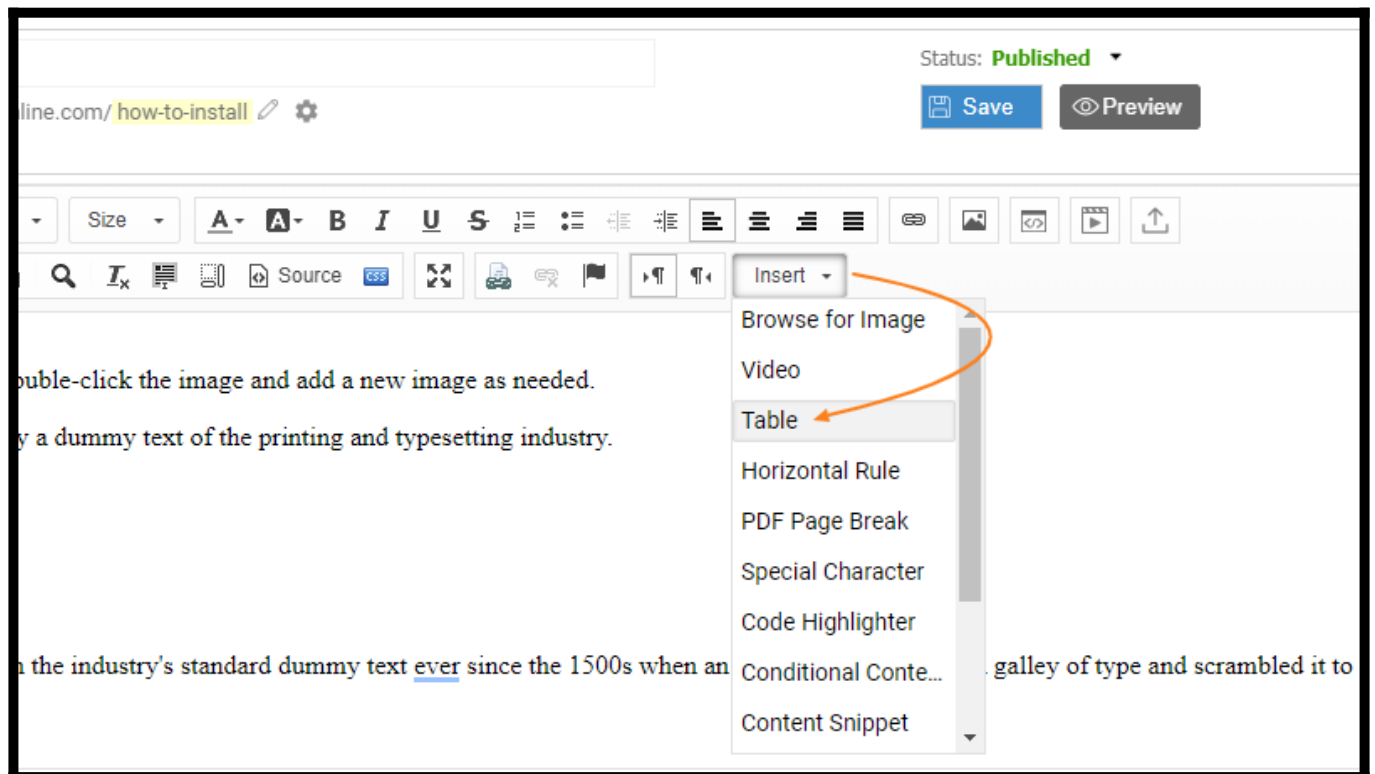
- [Creating a Table](#)
  - [Table Properties](#)
  - [Advanced](#)
- [Working With Tables](#)
- [Editing & Deleting Table Rows](#)
- [Editing & Deleting Table Columns](#)
- [Cell Properties](#)

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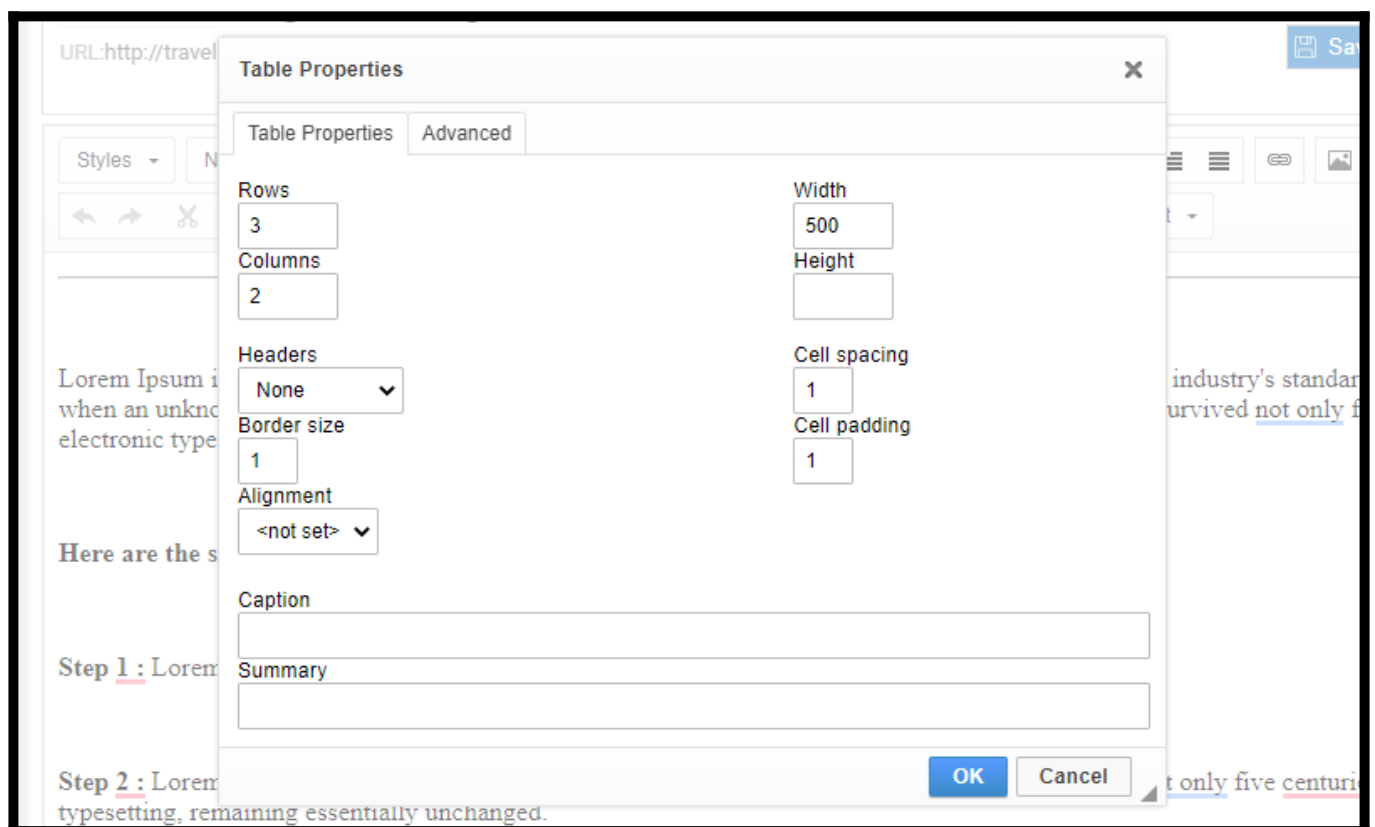
## Creating a Table

- Click **Insert** in the page editor and select **Table**. The Table Properties dialog window will open.





## Table Properties



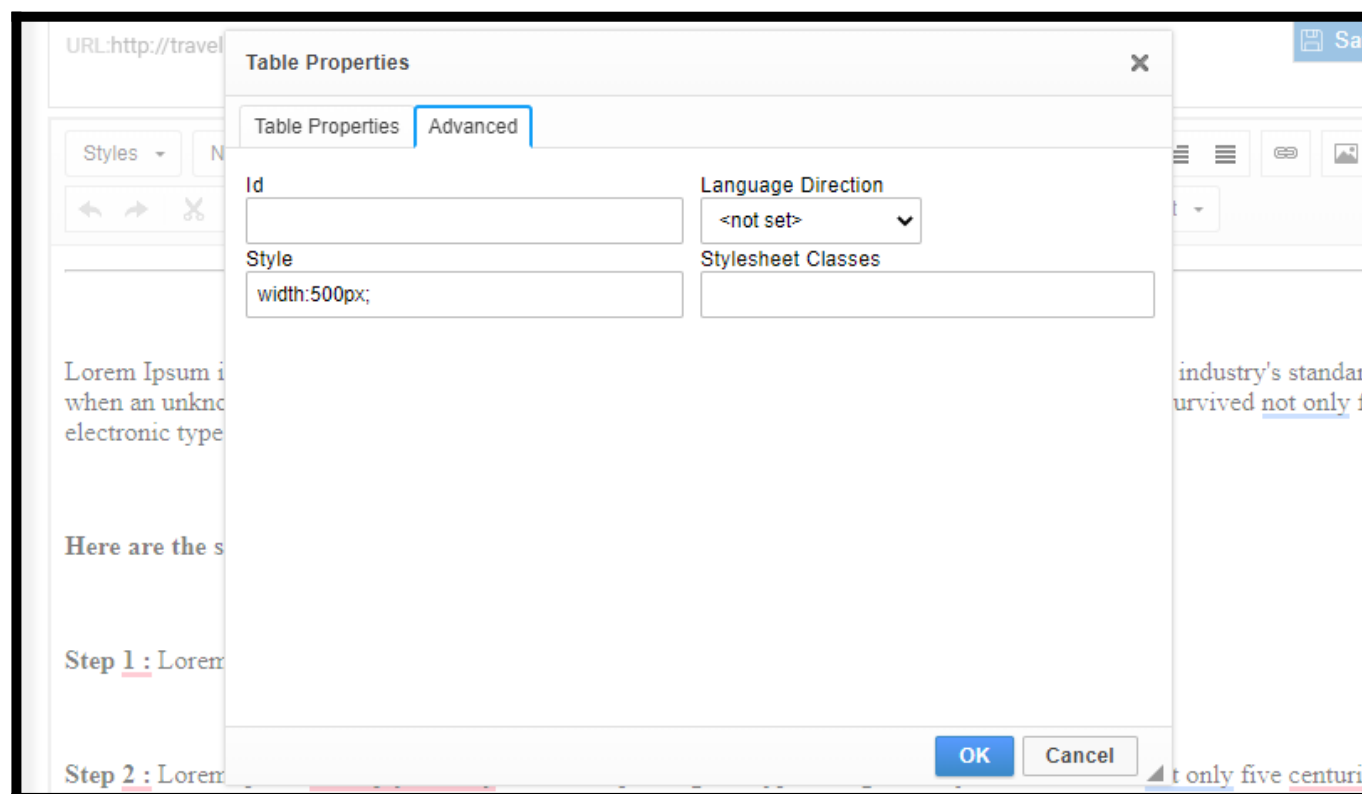
Below is an **overview** of all the elements of the Table Properties tab:

- **Rows** – The number of rows in the table (required).
- **Columns** – The number of columns in the table (required).
- **Width** – This sets the table's width in pixels or a percent value. Giving the width a percent value lets you set the proportion of the page that the table will occupy.
- **Height** – This sets the height of the table in pixels.
- **Headers** – You can format specific table cells as headers and apply special formatting to them. Choose the option from the header drop-down, viz., First Row, First Column, or both.
- **Border size** – This sets the thickness of the table border in pixels.
- **Alignment** – This sets the alignment of the table on the page. The following options are available: Left, Center, and Right.
- **Cell spacing** – It denotes the space between individual cells. And between cells & table borders. It is measured in pixels.
- **Cell padding** – It denotes the space between the cell border and its contents, measured in pixels.
- **Caption** – This is the label of the table that is displayed on top of it.
- **Summary** – This summary of the table contents is available for assistive devices like screen readers. It is an excellent practice to provide your tables with meaningful summary text to make them more accessible to users with disabilities.

## Advanced

## Advanced

The Advanced tab lets you configure additional table properties, such as assigning an ID, a class, a language direction, or a CSS style. It is meant for advanced users with knowledge of HTML and [CSS](#).

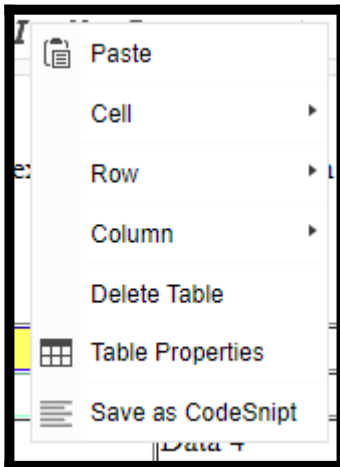


Below is an **overview** of all Advanced tab elements:

- **Id** – This is a unique identifier for a table element in the page (id attribute).
- **Language Direction** – This sets the direction of the text in the table: Left to Right (LTR) or Right to Left (RTL).
- **Style** – This sets CSS-style definitions (style attribute). Note that each value must end with a semi-colon, and individual properties should be separated with spaces.
- **Stylesheet Classes** – This is the class of the table element (class attribute). Note that a table element might be assigned more than one class. If this is the case, separate class names with spaces.

## Working With Tables

Once **inserted** into the document, you can modify the table. To **edit the table**, double-click it or open the table context menu by right-clicking on it or using the Menu/Application key on your keyboard.



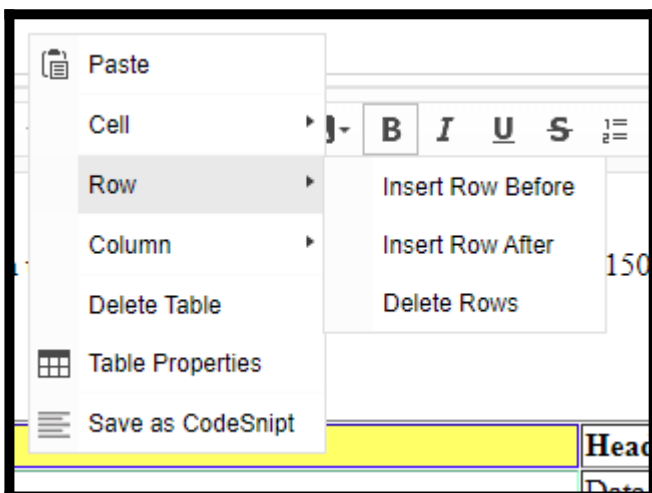
Use the "**Delete Table**" option to delete the whole table and its contents.

The **Table Properties** option allows you to change the **configuration settings** when the table was created, except for the number of rows and columns grayed out.

The **table context menu** lets you **modify** the rows, columns, or particular table cells. You can insert new rows, columns, or cells in specified locations and even merge and split cells.

### Editing & Deleting Table Rows

The table context menu lets you edit table rows. Additional options become available if you hover your mouse over "**Row**," as shown in the image below.



Below is an **overview** of all the **Row** context menu options:

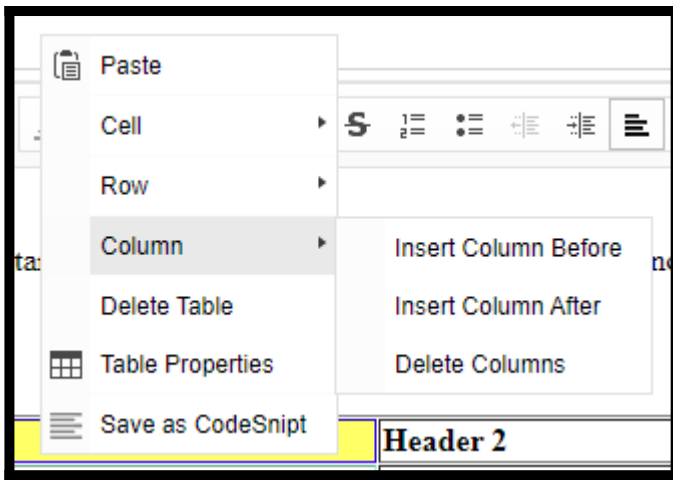
- **Insert Row Before** – This inserts a new row before the one that contains the cursor.
- **Insert Row After** – This inserts a new row after the one that contains the cursor.

- **Delete Rows** – This deletes the row that contains the cursor.

***Note:** It is possible to select multiple table cells by dragging the mouse over them, so an operation like deletion can be applied to many table rows simultaneously. Firefox works best for this.*

## Editing & Deleting Table Columns

The table context menu lets you edit table columns. If you hover your mouse over the Column menu option, additional options become available.



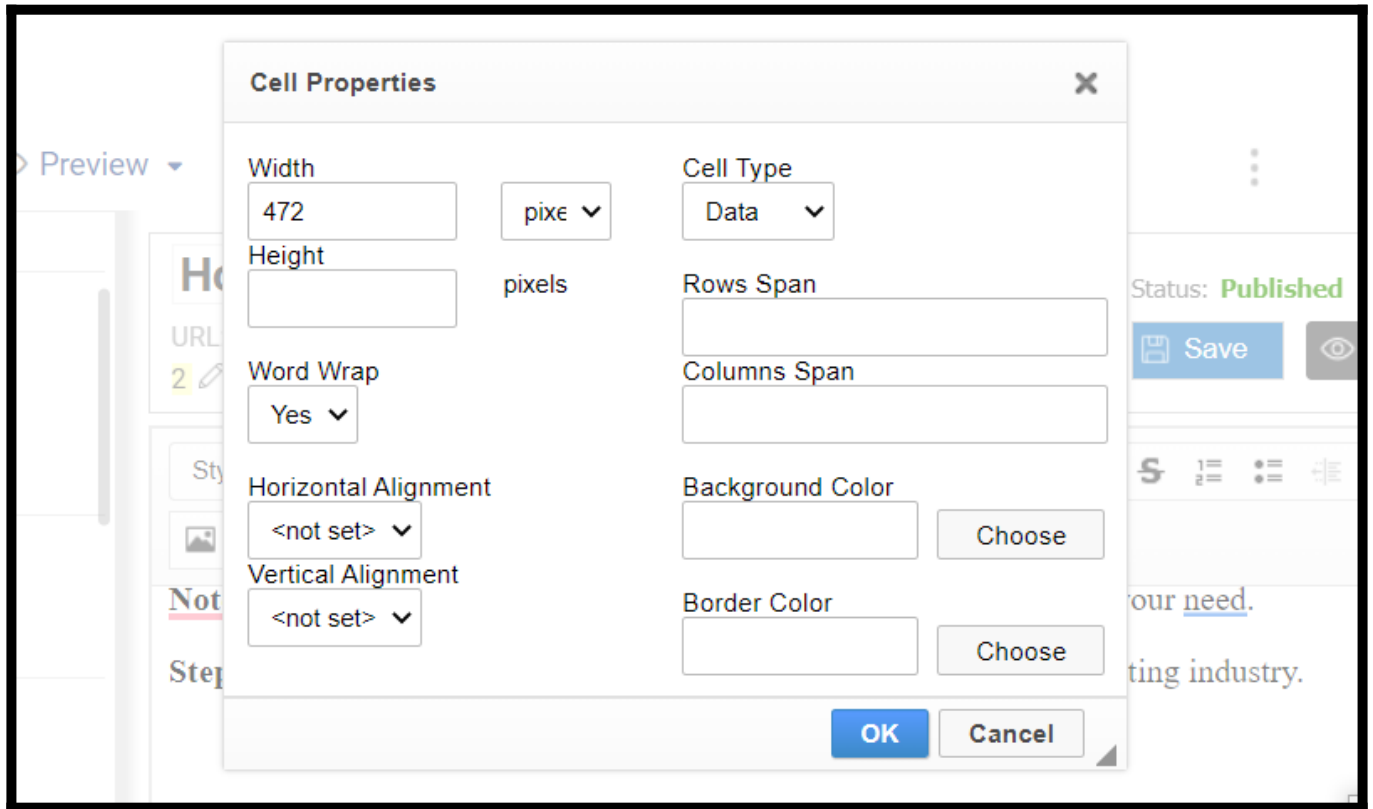
Below is an **overview** of all the **Column** context menu options:

- **Insert Column Before** – This inserts a new column before the one that contains the cursor.
- **Insert Column After** – This inserts a new column after the one that contains the cursor.
- **Delete Columns** – This deletes the column that contains the cursor.

***Note:** It is possible to select multiple table cells by dragging the mouse over them, so an operation like deletion may be applied to many table columns simultaneously.*

## Cell Properties

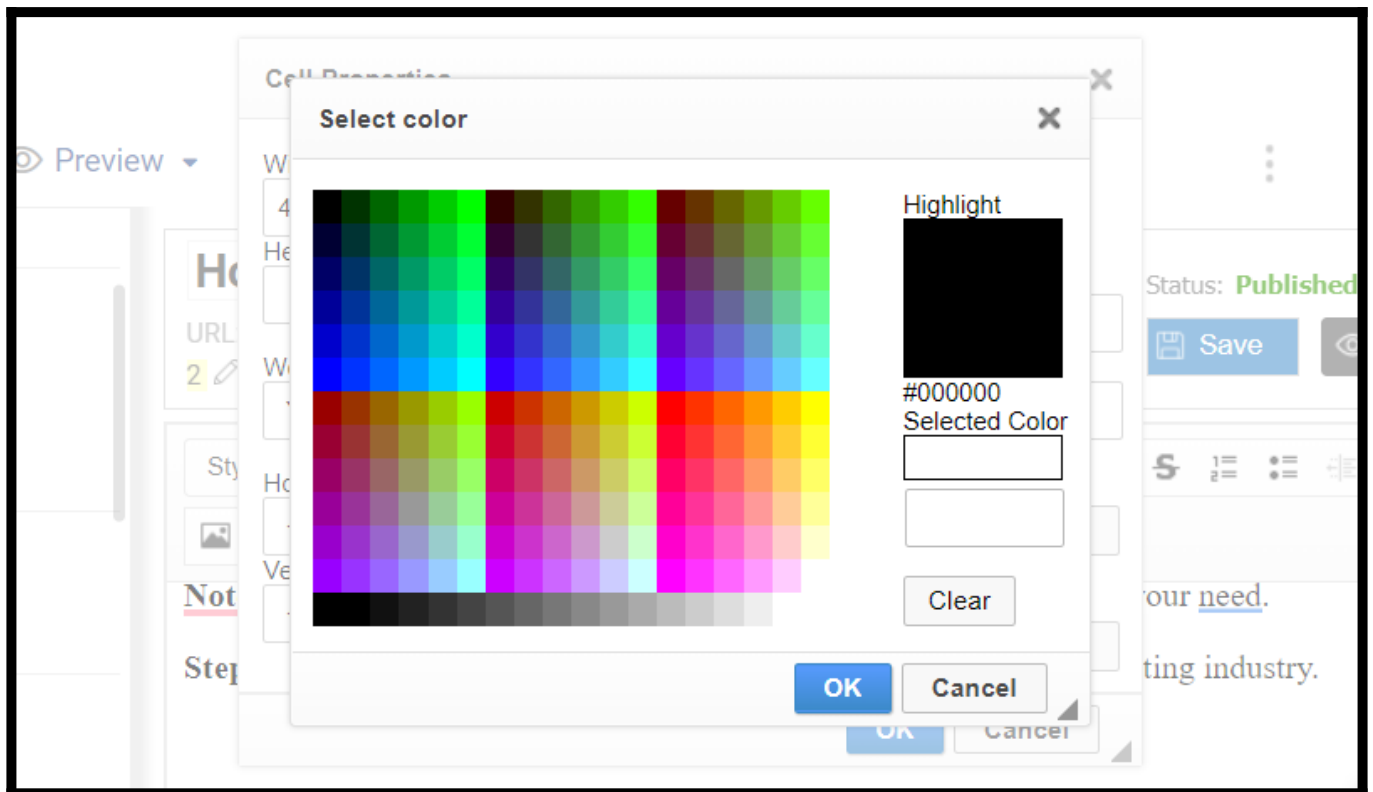
You can customize table cells to create a unique look & feel—Right-click on a cell to open the table context menu. Go to **Cell > Cell Properties** to access different configuration settings.



Below is an **overview** of all the **Cell Properties** dialog window elements:

- **Width** – This sets the cell's width in pixels or a percent value. Giving the width as a percent value lets you set the proportion of the row the cell will occupy. Suppose 100 is the total limit; if you set the percent value as 50, the cell will occupy half the row (and the column it is located in).
- **Height** – This sets the cell height in pixels.
- **Cell Type** – This defines whether the cell is a typical data cell or a header cell with special formatting. Generally, the header cells are the first row cells.
- **Word Wrap** – This setting turns word wrapping of the cell content on or off.
- **Rows Span** – This setting stretches the cell downward over several rows. Entering a numeric value sets the rowspan attribute.
- **Columns Span** – This setting stretches the cell to the right over several columns. Entering a numeric value sets the colspan attribute.
- **Horizontal Alignment** – This sets the horizontal alignment of table cell contents. The following options are available: **Left**, **Center**, or **Right**.
- **Vertical Alignment** – This sets the vertical alignment of table cell contents. The following options are available: **Top**, **Middle**, **Bottom**, or **Baseline**.

- **Background Color** – This is the color of the cell background. You can use either of the following methods to set the color:
  - Enter the RGB value in the text box in the RGB format (nn, nn, nn), where nn is a numeric value on a scale from 0 to 255 representing the red, green, and blue channels.
  - Enter the hexadecimal RGB value in the text box in the #nnnnnn format, where the n letters stand for the three pairs of hex color values representing the red, green, and blue channels.
  - Use the **Choose** button to open the **Select Color** dialog window and pick the color with your mouse.
- **Border Color** – This is the color of the cell border. You can use either of the following methods to set the color:
  - Enter the RGB value in the text box, in the RGB format (nn, nn, nn), where nn is a numeric value on a scale from 0 to 255 representing the red, green, and blue channels.
  - Enter the hexadecimal RGB value in the text box in the #nnnnnn format, where the n letters stand for the three pairs of hex color values representing the red, green, and blue channels.
  - Use the **Choose** button to open the **Select Color** dialog window and pick the color with your mouse.



*That is all about adding tables in the Knowledge Base articles.*

## Related Articles

- [Links](#)
- [Lists](#)
- [Videos](#)



# Links

Links are any textual, visual, or in some cases, email element in HTML. In the ProProfs Knowledge Base editor, you can insert links to an internal/external URL to add a reference to your knowledge base articles. You can even add an email address as a link to invite user feedback & queries via email.

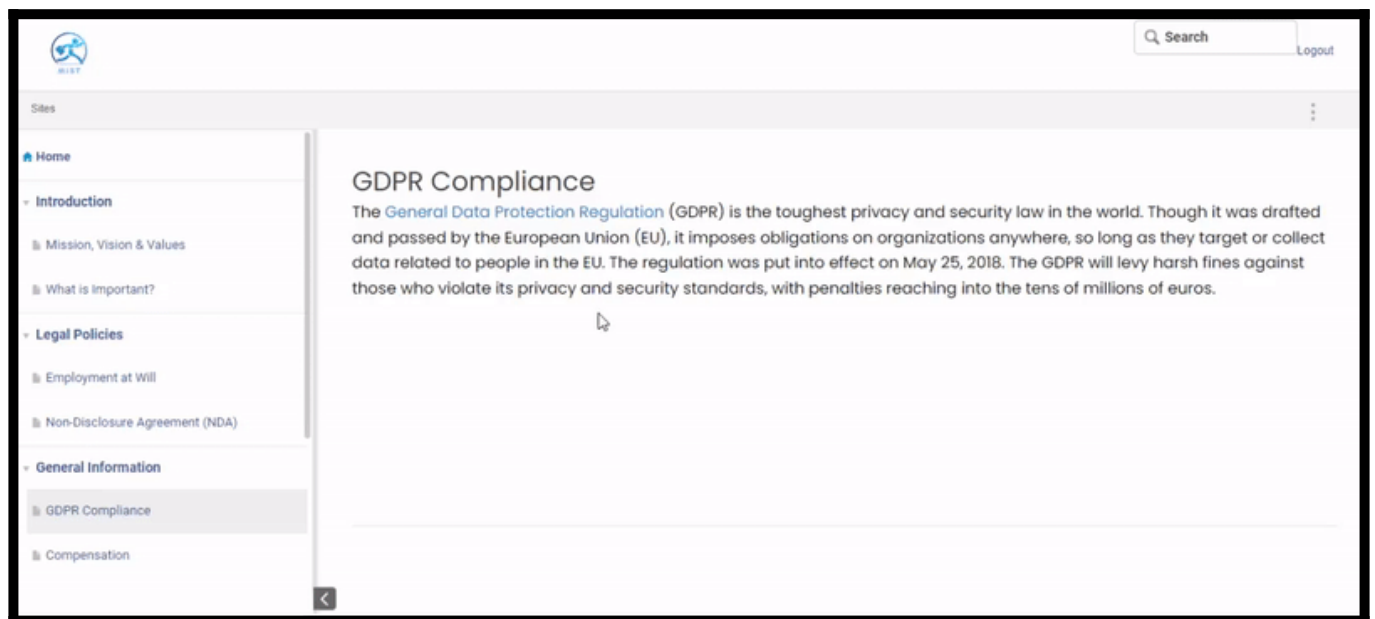
This article shows a step-by-step procedure for adding links to other pages.

## Benefits of adding links:

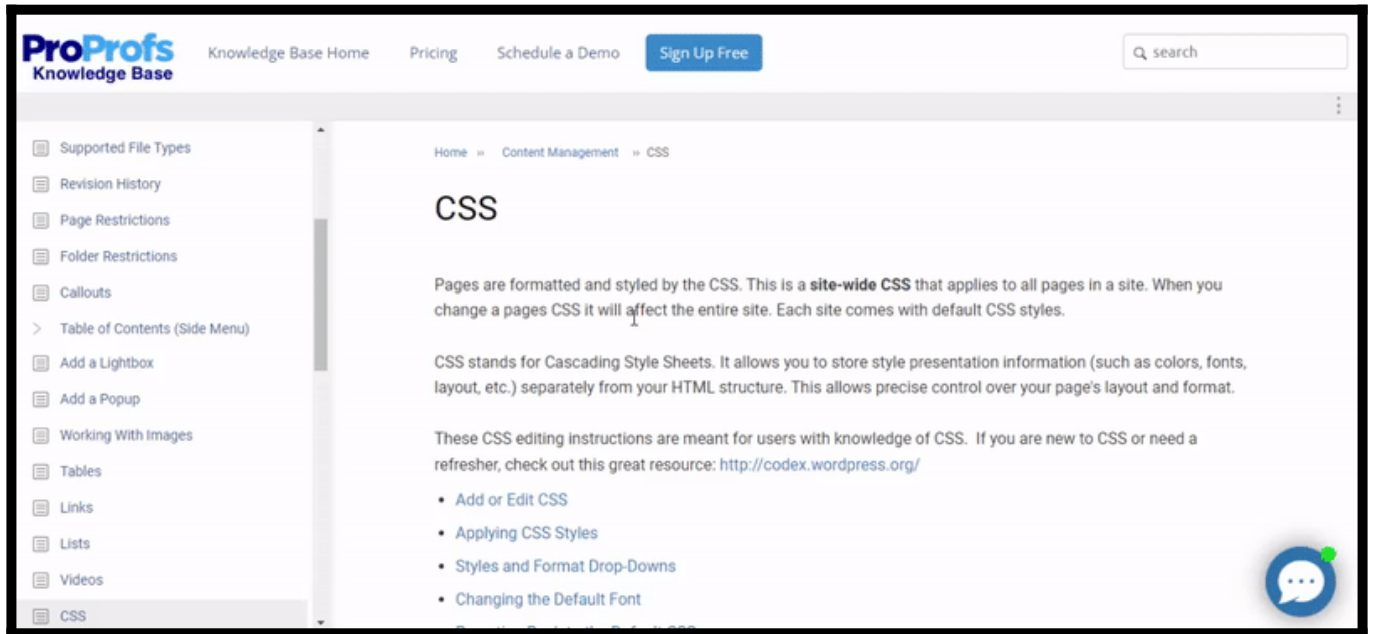
- Simplifies navigation to related articles
- Redirects users to the relevant information
- Boosts help pages' search visibility

Here's how various link types can improve page navigation.

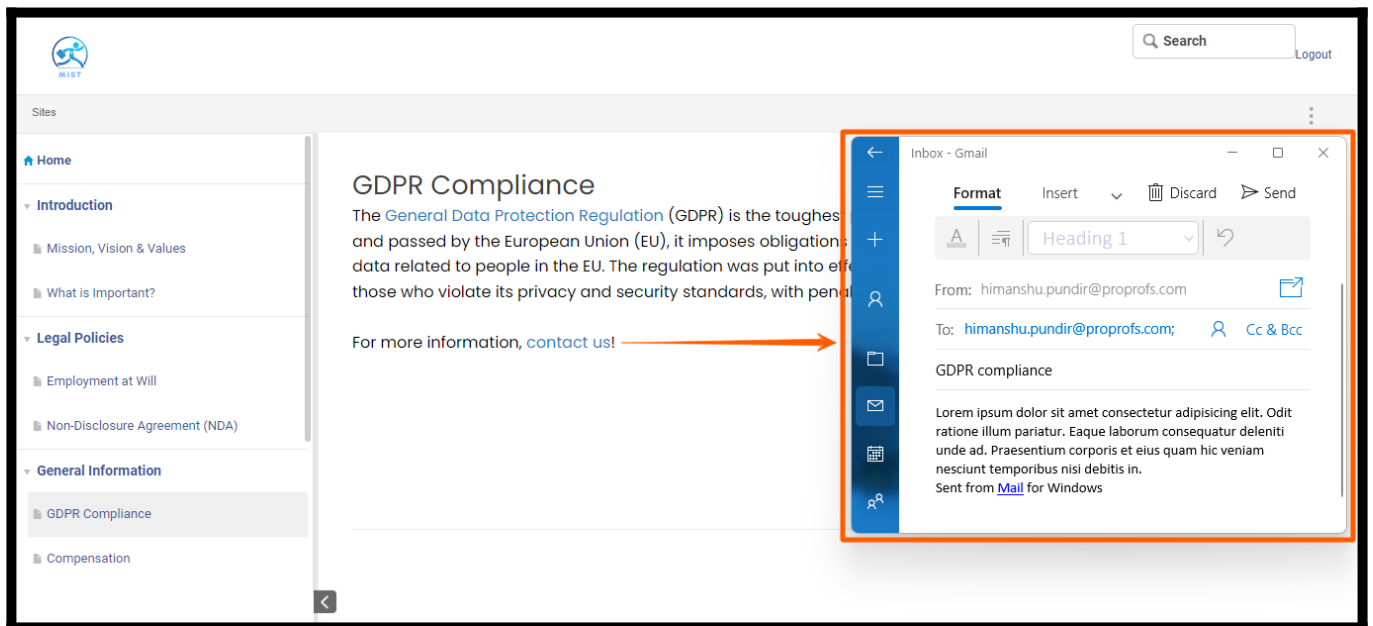
## Link to an external URL



## Anchor Link



## Link as an email




This article covers the following:

- [Link Dialog Box Overview](#)
  - [Link Info](#)
  - [Link Type- URL](#)
  - [Link Type- Emails](#)
  - [Link Type- Link to anchor in the text](#)
  - [Link Type > Add an external link using HTML](#)
- [Advanced Tab](#)

- [Removing a Link](#)

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## Link Dialog Box Overview


To insert a link into your page, press the  icon on the toolbar or use the **Ctrl+L** keyboard shortcut.

If you want the link to be assigned to a specific text, select that text first. The link URL or email address will appear as is on the page if no text is picked.

The Link dialog box contains two sections: **Link info** and the **Advanced** section. Let's see how these options work:

***NOTE:** When Link Type is selected as "URL," you have one more option as **Target** in the Link Dialog box.*

### Link Info

The **Link Info** tab is the default tab that opens after you click the  button on the toolbar in which you have:

1. **Link Type:** It allows you to choose one of the following options:

- **URL** – the web address of anything available on the Internet, such as a website, a PDF document, or an image. For example, you can use <http://example.com/about.html> or <http://example.com/image1.jpg> as the **URL**.
- **Link to anchor** in the page – an internal link to a designated point on your page. For example, you can use **#anchor1** to anchor text.
- **Email** – Use an email address as a link. For example, use [myname@example.com](mailto:myname@example.com) to link email.

2. **Protocol** – This is the communication protocol used with the web address. You can choose one of the following options: <http://>, <https://>, <ftp://>, <news://>, or . to use in the protocol.

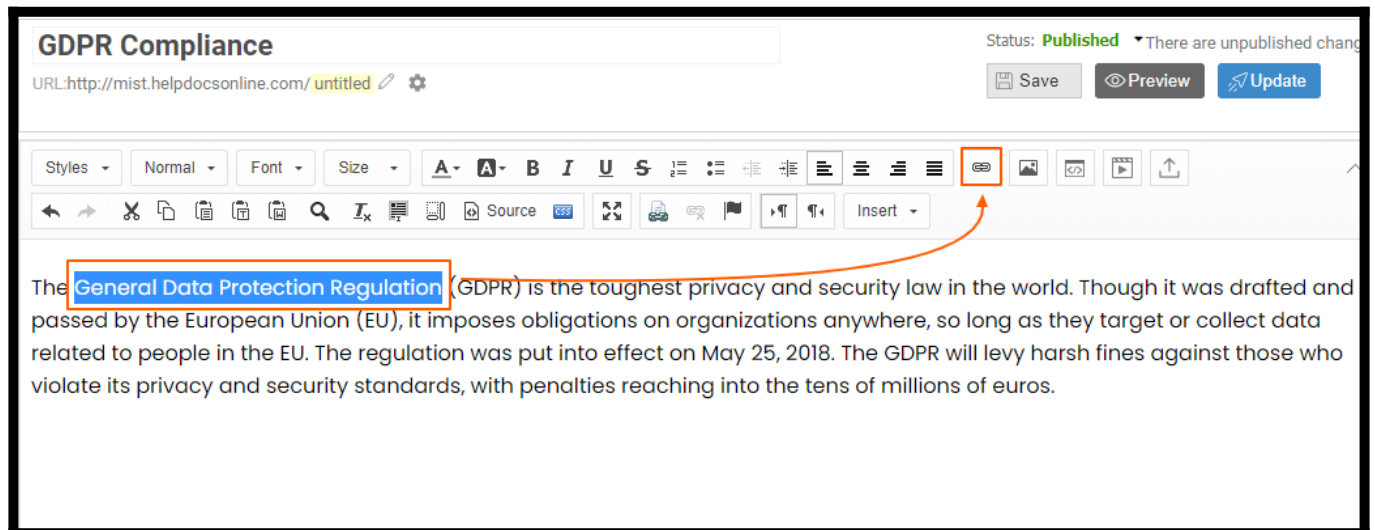
3. **URL** – This is the website address for the external resource to which the link will redirect users. For example, you can use the URLs: <http://example.com/about.html> or <http://example.com/image1.jpg>.

4. **Browser Server** - You can also browse the server to select an image or file. If you upload a file using the [file manager](#), you can add a link on a page to download the file.
5. **Link to Page** - This will open an overlay to [link to another page](#).

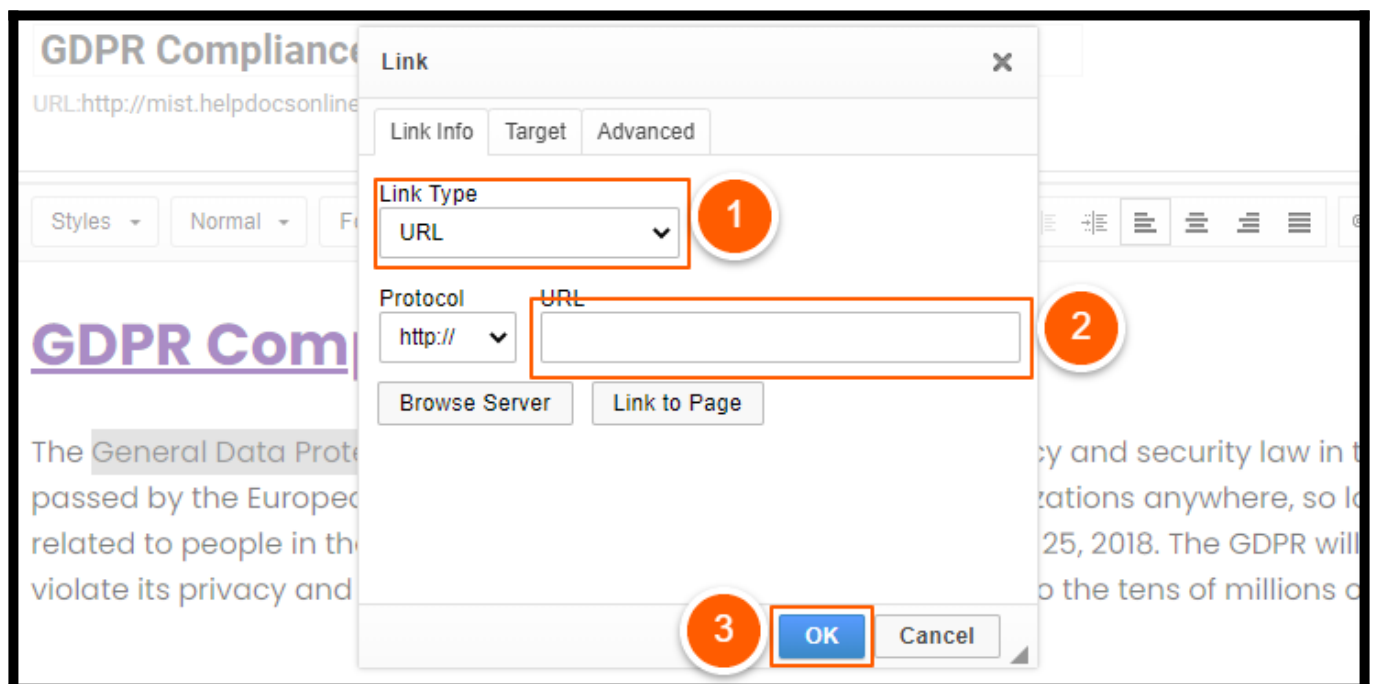
## Link URL

In your ProProfs Knowledge Base page editor,

**Step 1:** Select the text and click "" in the toolbar.

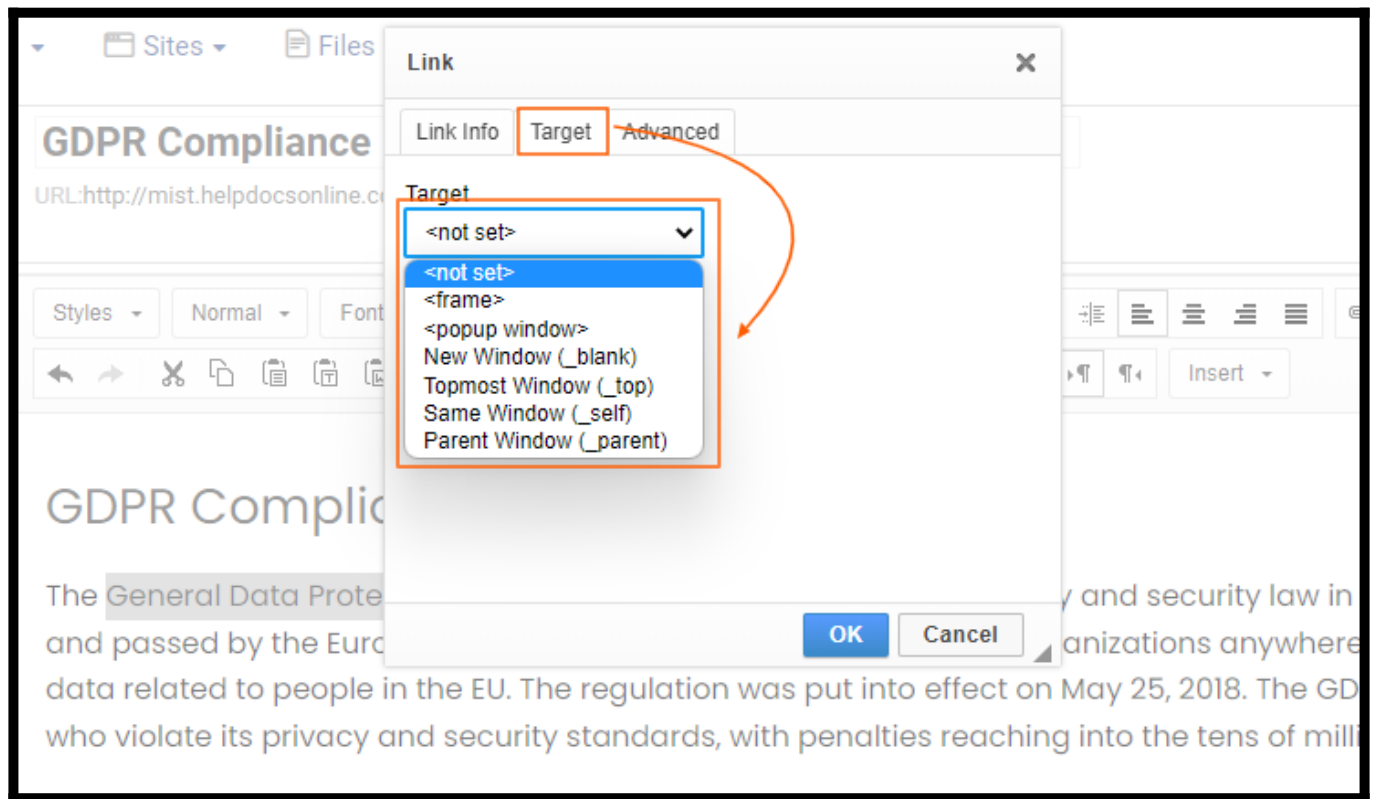


- Select the link type as "URL," enter the link and click **OK**.



## How to set the targeting options

After adding the URL, you need to set the **Target** options. Switch to the **Target** tab, select the target option and click **OK** to save the changes.

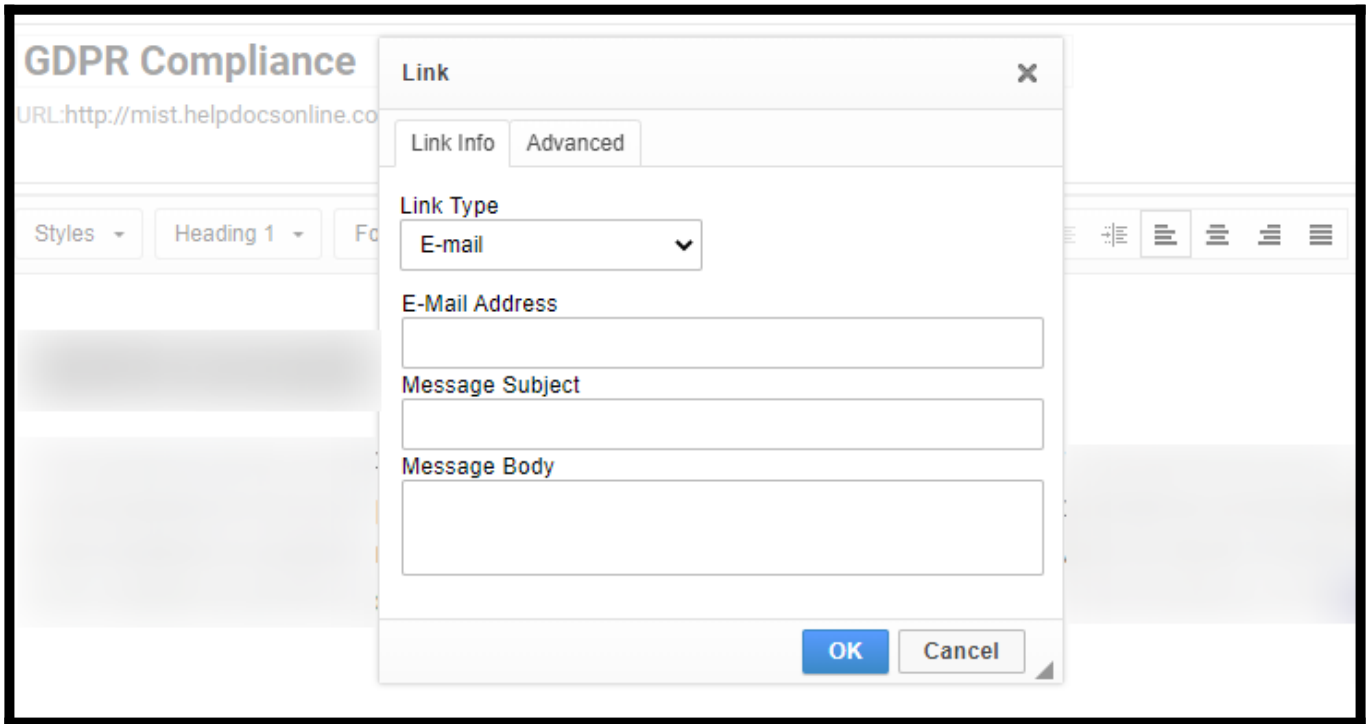


Here is a **brief description** of how these target options work:

1. **<not set>**: Opens the link in the same tab.
2. **<frame>**: Opens the link in the named iframe.
3. **<popup window>**: Opens the link in the popup window.
4. **New Window**: Opens the link in the new tab.
5. **Topmost Window**: Opens the link in the entire body of the window.
6. **Same Window**: Opens the link in the same window or frame.
7. **Parent Window**: Opens the link in the parent frame.

## Link Type > Email

This feature allows you to insert a clickable email address, subject, and body of the email message to your pages when you click the link.

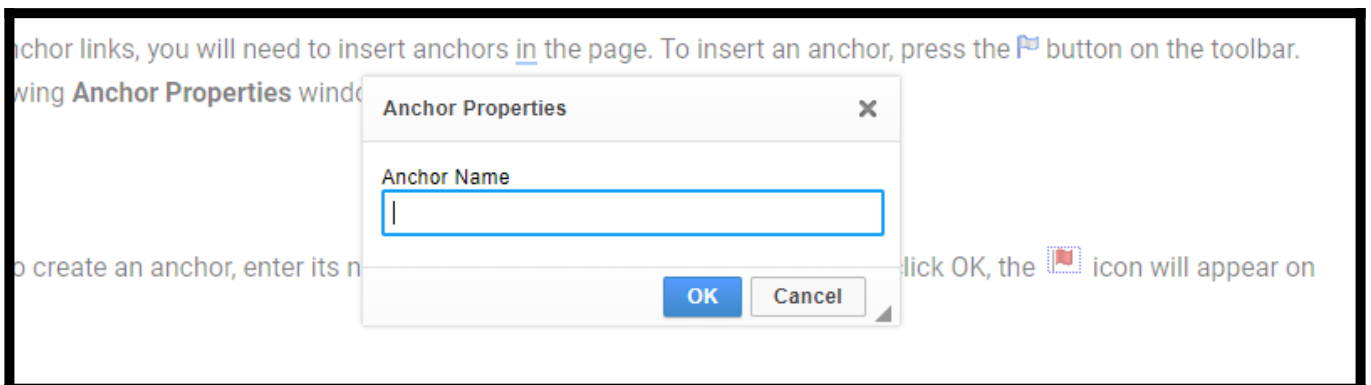



The **Link Info** tab contains the following fields that let you configure the recipient and the message content:

- **Email Address** – This is the address of the recipient of the email message. This field is required for the email link to work.
- **Message Subject** – This is the default text in the email message's subject line.
- **Message Body** – This is the default text in the email message as its content.

## Link Type > Link to anchor in the text

To use anchor links, you will need to insert anchors in the page. To insert an anchor, press the  button on the toolbar. The following **Anchor Properties** window will appear:



In order to create an anchor, enter its name in the Anchor Name text box. Once you click OK, the  icon will appear on the page.

To remove an anchor, select it and press **Delete**.

**Do not use spaces between words in the Anchor Name. If you need a space, put a dash such as "how-to."**


The Link Info tab allows you to point to an anchor previously set on the page. This tab contains the following options that make selecting an anchor an easy task:

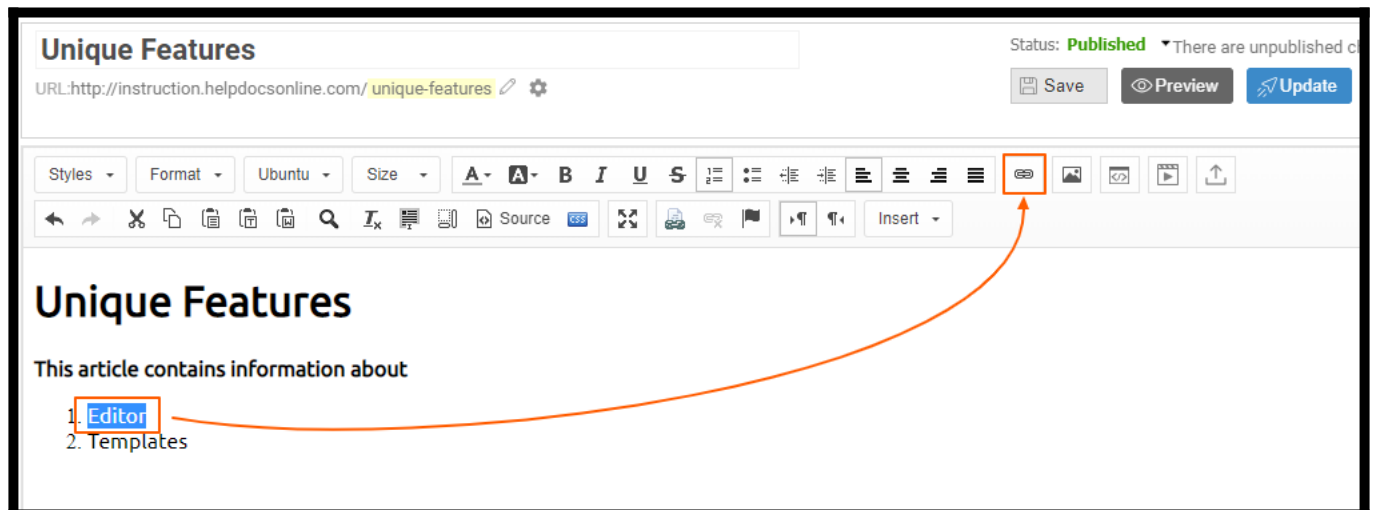
- **By Anchor Name** – This is a drop-down list containing the names of all anchors established on the page.
- **By Element Id** – This is a drop-down list containing the identifiers of all anchors established on the page with the ID attribute.

If you do not have any anchors defined on your page, a message telling you so will be displayed in the Link Info tab.

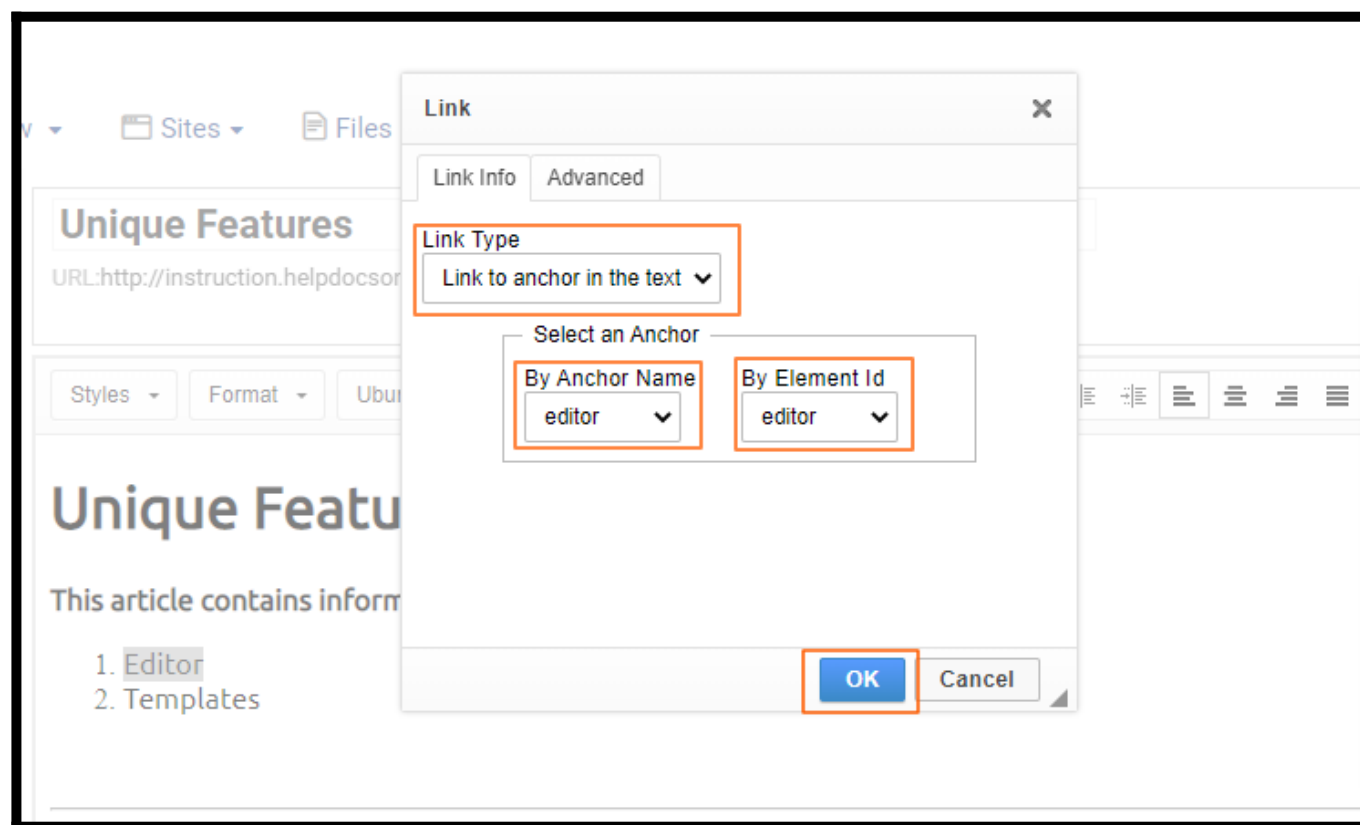
Here is how you can use Anchor Links

**Step 1:** Open the ProProfs Knowledge Base page editor.

**Step 2:** Select the text and click 



**Step 3:** Select the link type as “Link to anchor in the text,” Anchor name, and **Element ID**. Click **OK**.



The anchor tag in the URL would be in the format: **URL\$AnchorName**

Here is what the URL with an anchor tag would look like -

**[http://instruction.helpdocsonline.com/unique-features\\$editor](http://instruction.helpdocsonline.com/unique-features$editor)**

In the above example,

- URL is "**[http://instruction.helpdocsonline.com/unique-features\\$editor](http://instruction.helpdocsonline.com/unique-features$editor)**"
- AnchorName is "**editor.**"

## Link Type > Add an external link using HTML

ProProfs Knowledge Base editor also allows you to use HTML code to insert links in the text.

**Step 1:** Open the page editor and click the "**view source**" button.





**Step 2:** Replace the text with an **anchor link** and **anchor text** with the following HTML tag:

```
<a href=" ADD YOUR LINK HERE" target="_blank">ADD THE ANCHOR TEXT FOR THE LINK</a>
```


**Step 3:** Save the changes.

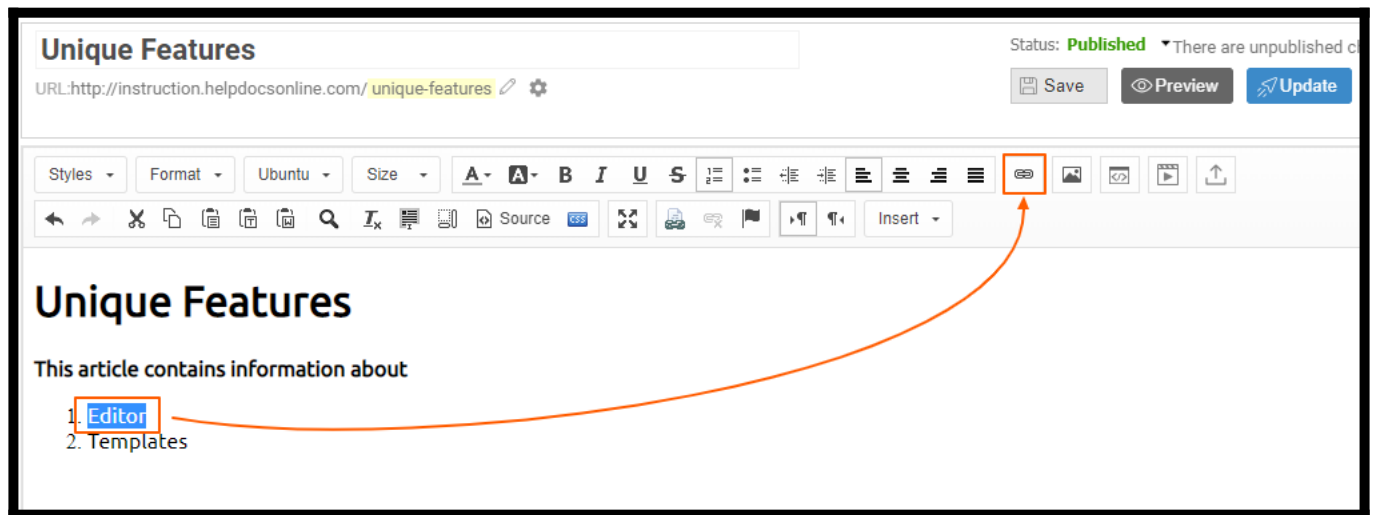


## Link to Download a File

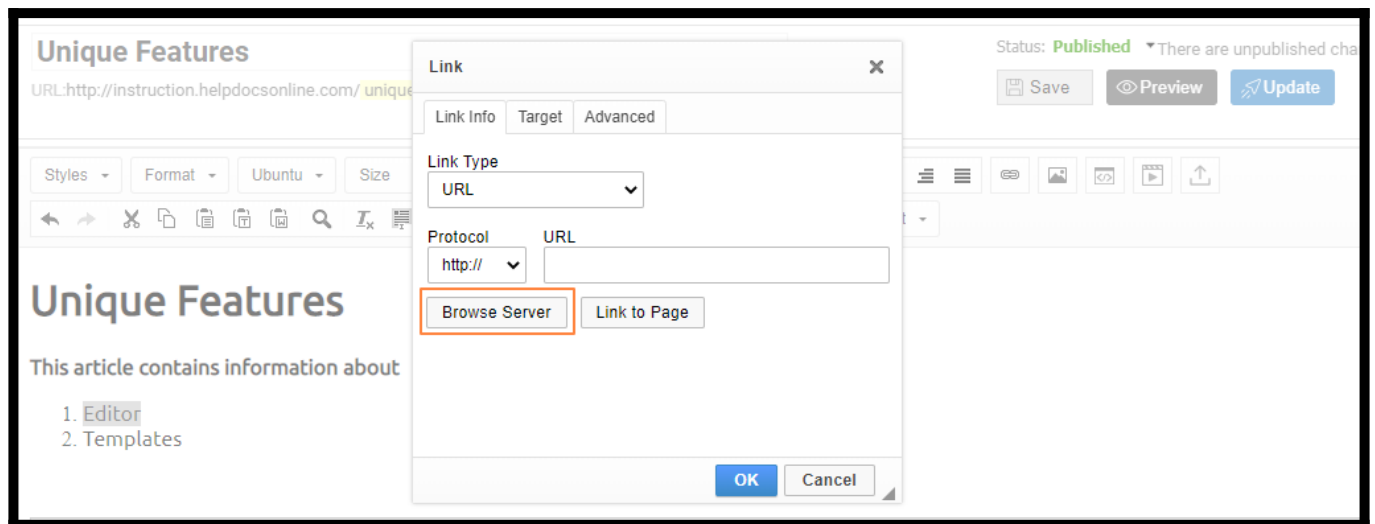
First, you have to upload the file to your library. After you have **uploaded** it, you can insert a hyperlink that will download that file.

**Step 1:** Open the ProProfs Knowledge Base page editor.

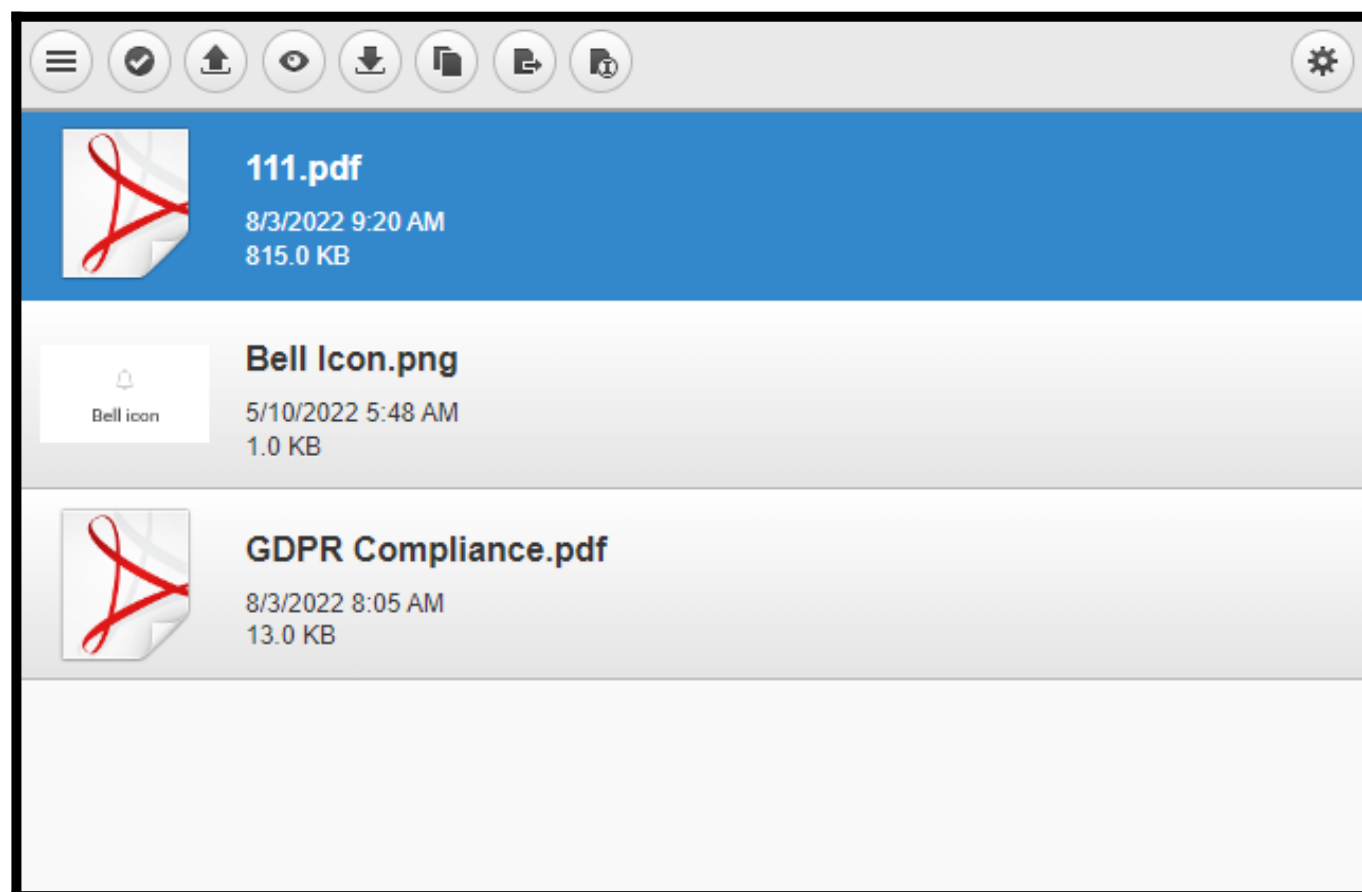
**Step 2:** Select the text and click .



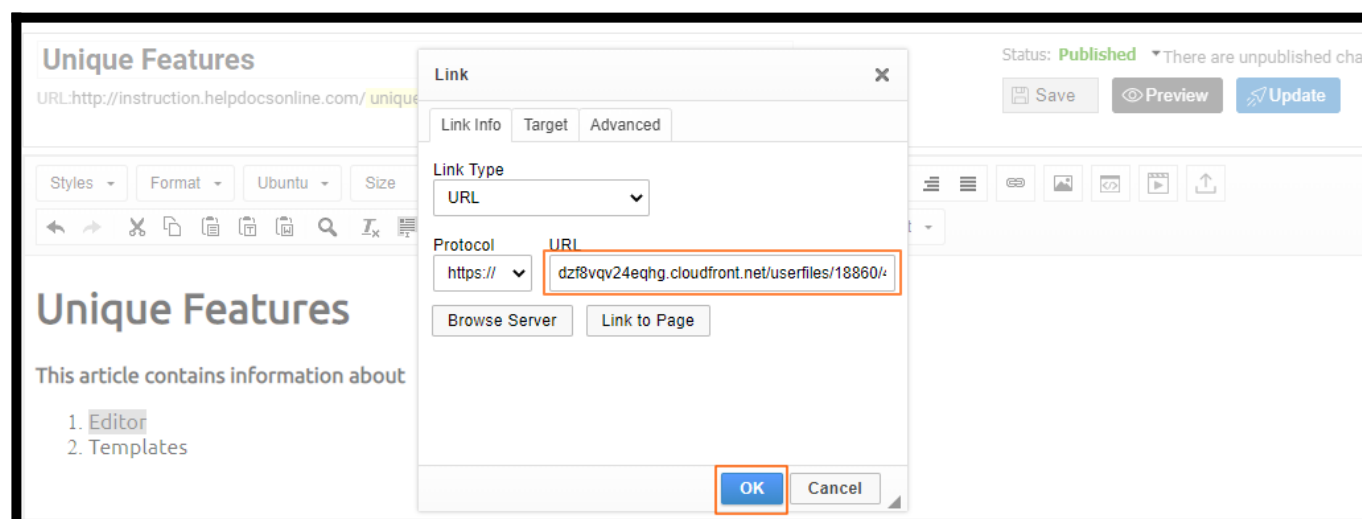
### Step 3: Click Browser Server



### Step 4: Select the file to download.



**Step 5:** Click **OK** to save the changes. A hyperlink will appear on the selected text.



## Advanced

The Advanced tab lets you configure additional link options, such as assigning an ID, a class, a tab index, a tooltip, or CSS-style properties. It is meant for advanced users with knowledge of HTML and CSS.

The screenshot shows the ProProfs Knowledge Base editor interface. A 'Link' dialog box is open, with the 'Advanced' tab selected and highlighted by an orange rectangle. The dialog box contains the following fields:

- Id**: Text input field.
- Language Direction**: Dropdown menu with '<not set>' selected.
- Access Key**: Text input field.
- Name**: Text input field.
- Language Code**: Text input field.
- Tab Index**: Text input field.
- Advisory Title**: Text input field.
- Advisory Content Type**: Text input field.
- Stylesheet Classes**: Text input field.
- Linked Resource Charset**: Text input field.
- Relationship**: Text input field.
- Style**: Text input field.

At the bottom of the dialog box are 'OK' and 'Cancel' buttons. The background shows the editor's toolbar with options like 'Styles', 'Heading 1', and 'Font'.

Here is a brief description of **Advanced** tab elements:

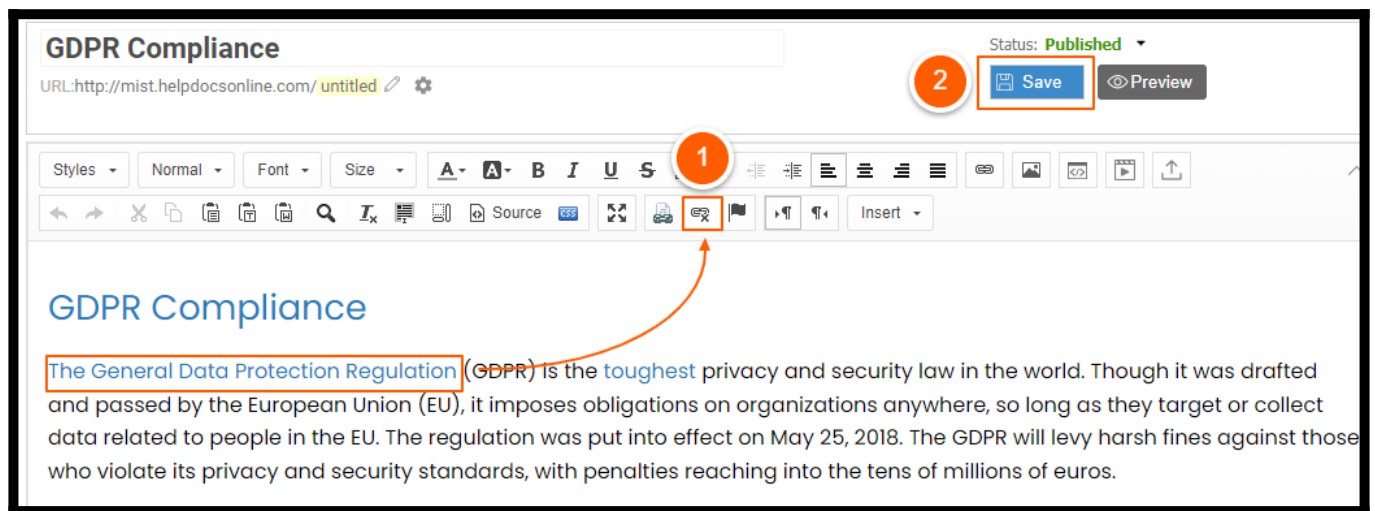
- **Id** – A unique identifier for the link element in the page (id attribute).
- **Language Direction** – The direction of the text: Left to Right (LTR) or Right to Left (RTL) (dir attribute).
- **Access key** – A keyboard shortcut to access the link element (access key attribute).
- **Name** – The name of the link element (name attribute).
- **Language Code** – The language of the link element is specified according to RFC 1766 (lang attribute).
- **Tab Index** – The tab order of the link element (tab index attribute).
- **Advisory Title** – The tooltip text appears when the mouse cursor hovers over the link (title attribute).
- **Advisory Content Type** – The content type of the link (type attribute).
- **Stylesheet Classes** – The class of the link element (class attribute). Note that a link element might be assigned to more than one class. If this is the case, separate class names with spaces. Learn more about [CSS properties](#).
- **Linked Resource Charset** – The character set of the linked resource (charset attribute).
- **Relationship** – The relationship between the current page and the link target (rel attribute).

- **Style** – CSS style definitions (style attribute). Note that each value must end with a semi-colon, and individual properties should be separated with spaces. Learn more about [CSS properties](#).

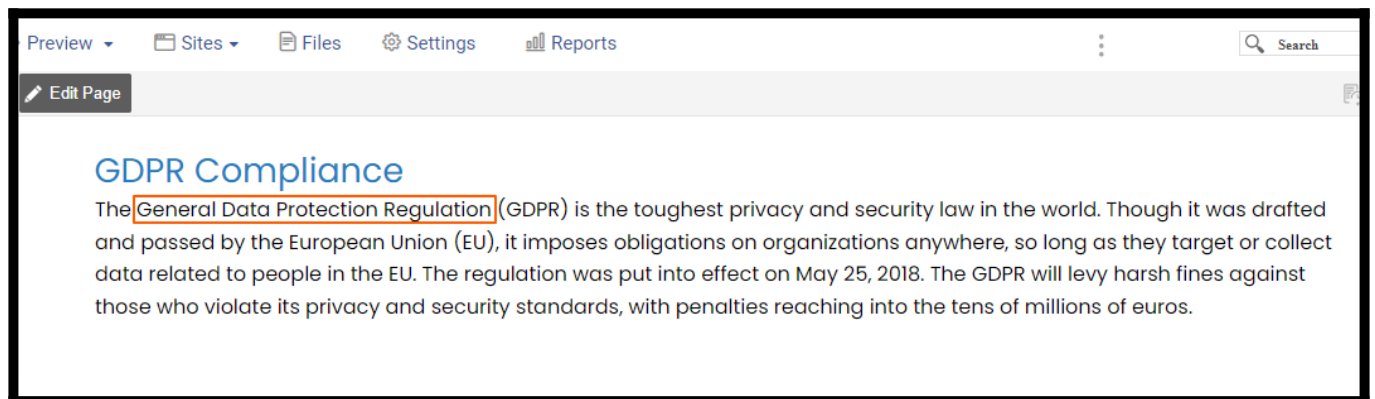
## Removing a Link

**Step 1:** Open the ProProfs Knowledge Base page editor.

**Step 2:** Select the link and click the unlink button in the toolbar. Save the changes.



**Step 3:** Click **Preview** to see the changes.



*That is all about adding links in the ProProfs Knowledge Base editor.*

### Related Articles

- [Tables](#)
- [Lists](#)
- [Videos](#)

# How to Create Lists

The **Lists** feature in the editor is a powerful option that lets you add ordered and unordered lists in your pages and control how they look.

Using lists, you can make your help articles easier to scan for readers.

**Here's what the lists will look like in an article:**

## Product Key Features

**This is sample content. You can edit this as needed.**

---

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip consequat. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived five centuries, and the leap into electronic typesetting has remained unchanged.

1. Item One
2. Item Two
3. Item Three

- Bullet One
- Bullet Two
- Bullet Three

**In this article, you will learn:**

1. [How to Create a Numbered List](#)
2. [How to Create a Bulleted List](#)

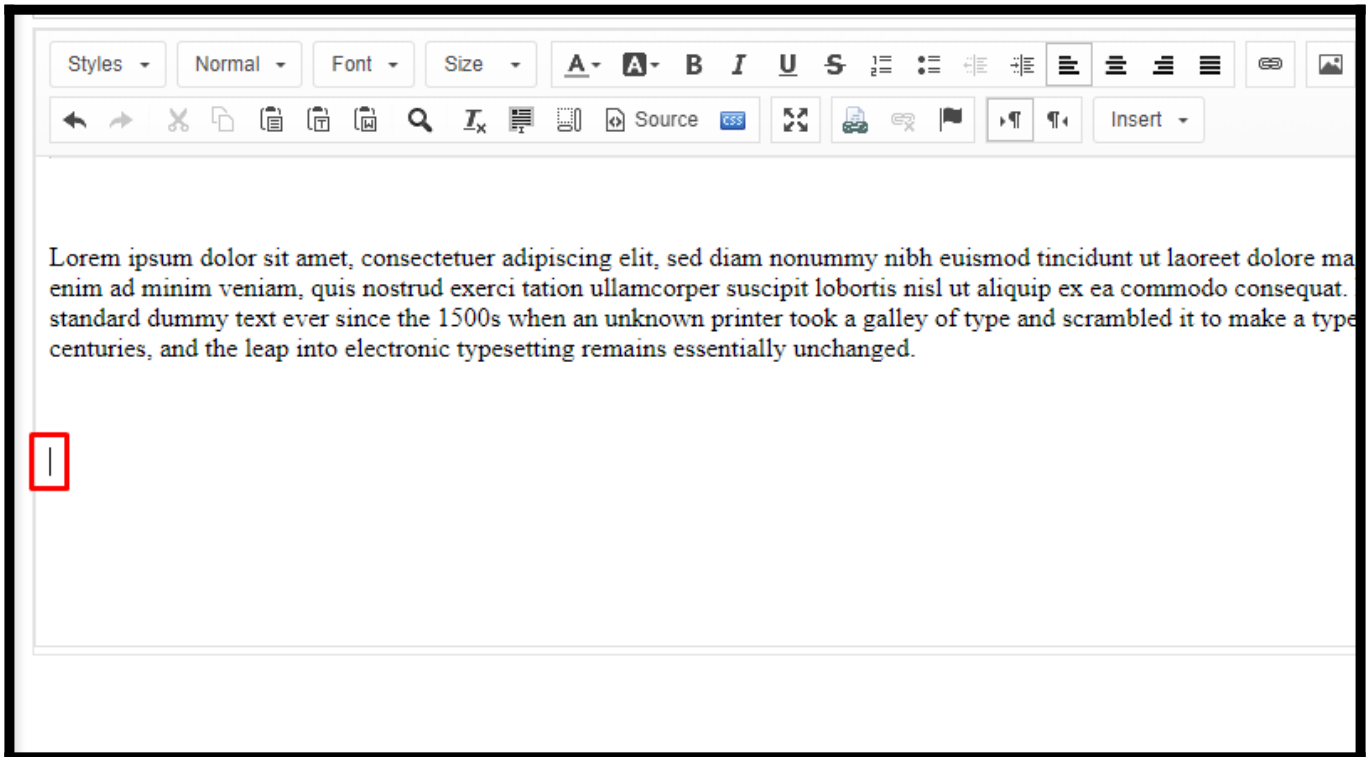
---

## Numbered List

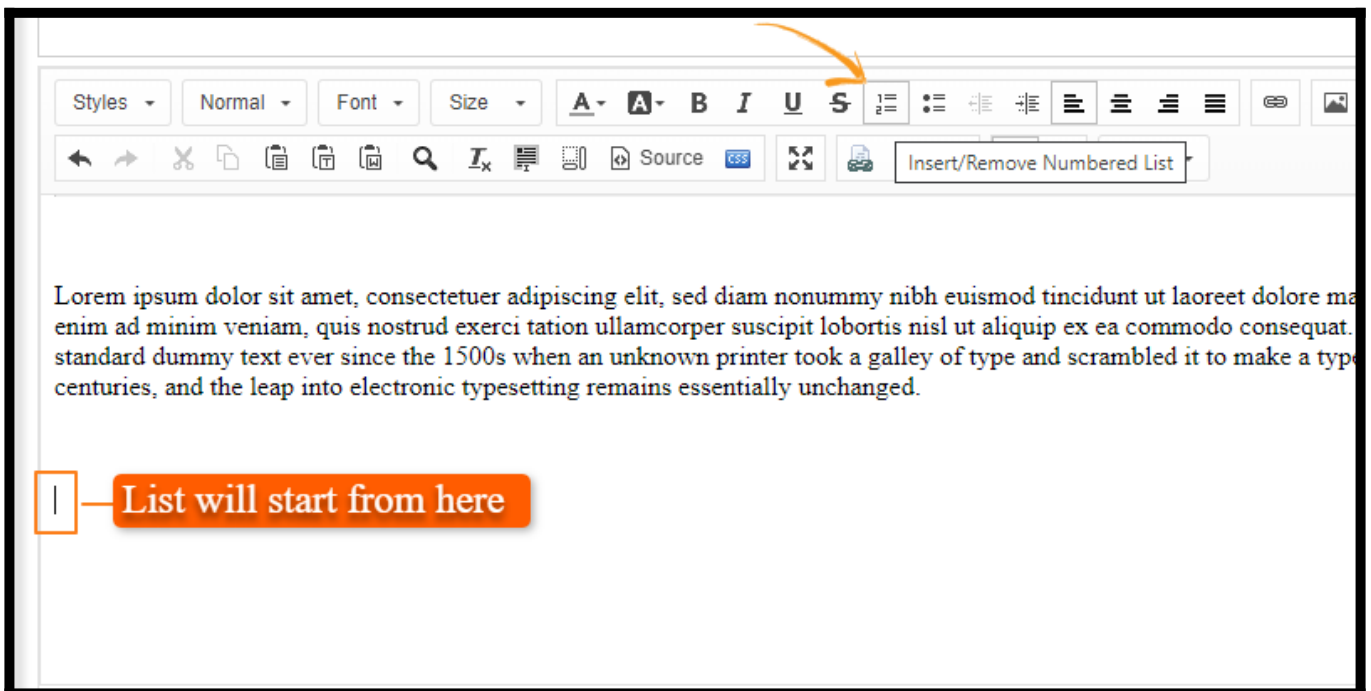
Numbered lists are useful when you want to list several items in a particular order. They are perfectly suited for lists of procedures or step-by-step instructions.

Follow these simple steps in the page editor to create a numbered list:

**Step 1:** Move your cursor to where you want to add a list and click to select the starting point

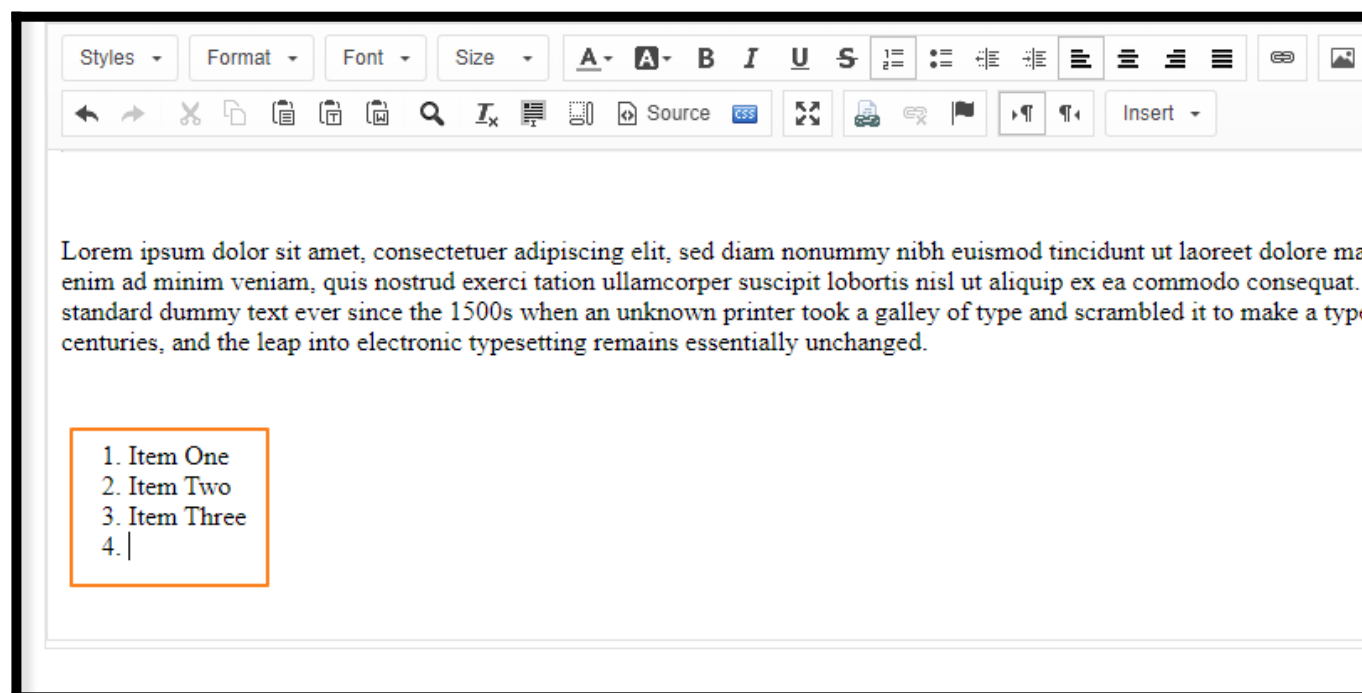


**Step 2:** Click on the **numbered list** option in the toolbar.



**Note:** A list number will appear at the beginning of the line of text where your cursor is, and that line of text will be indented.

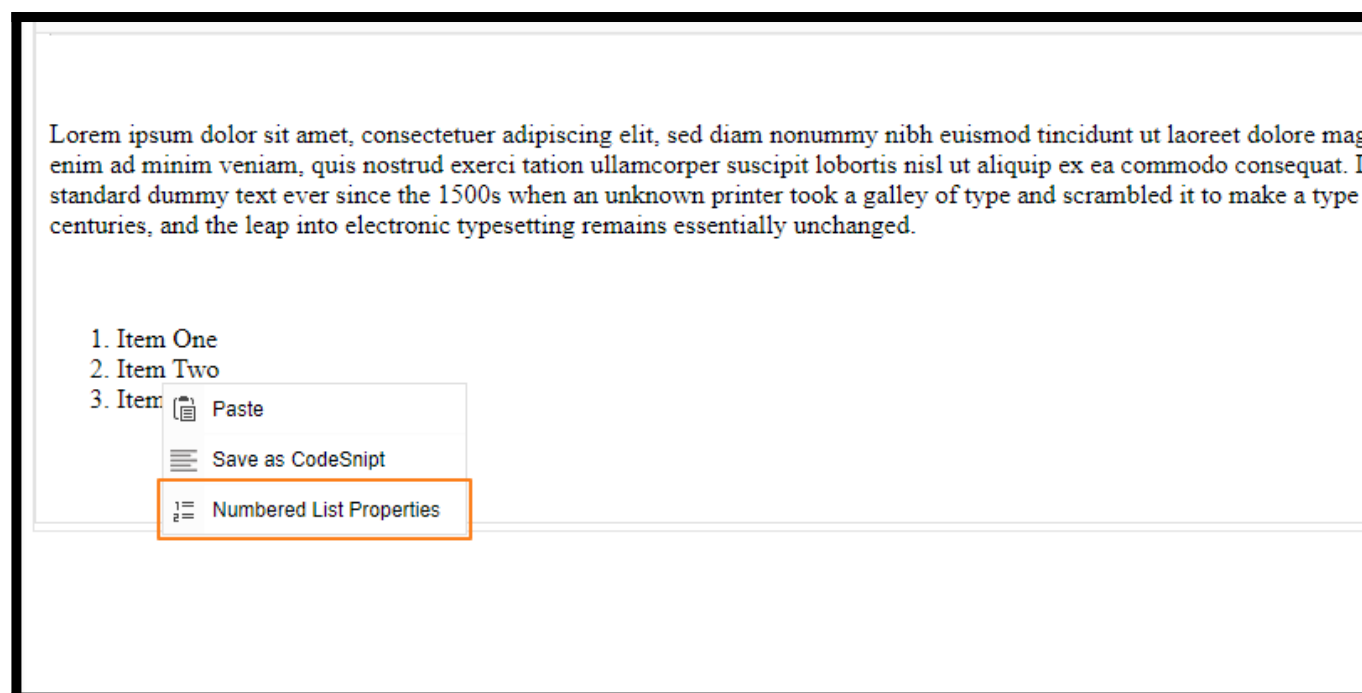
**Step 3:** Hit the **Return/Enter** key at the end of the numbered line of text to add an additional item



**Note:** To end the list, click on the numbered list option again or hit enter twice.

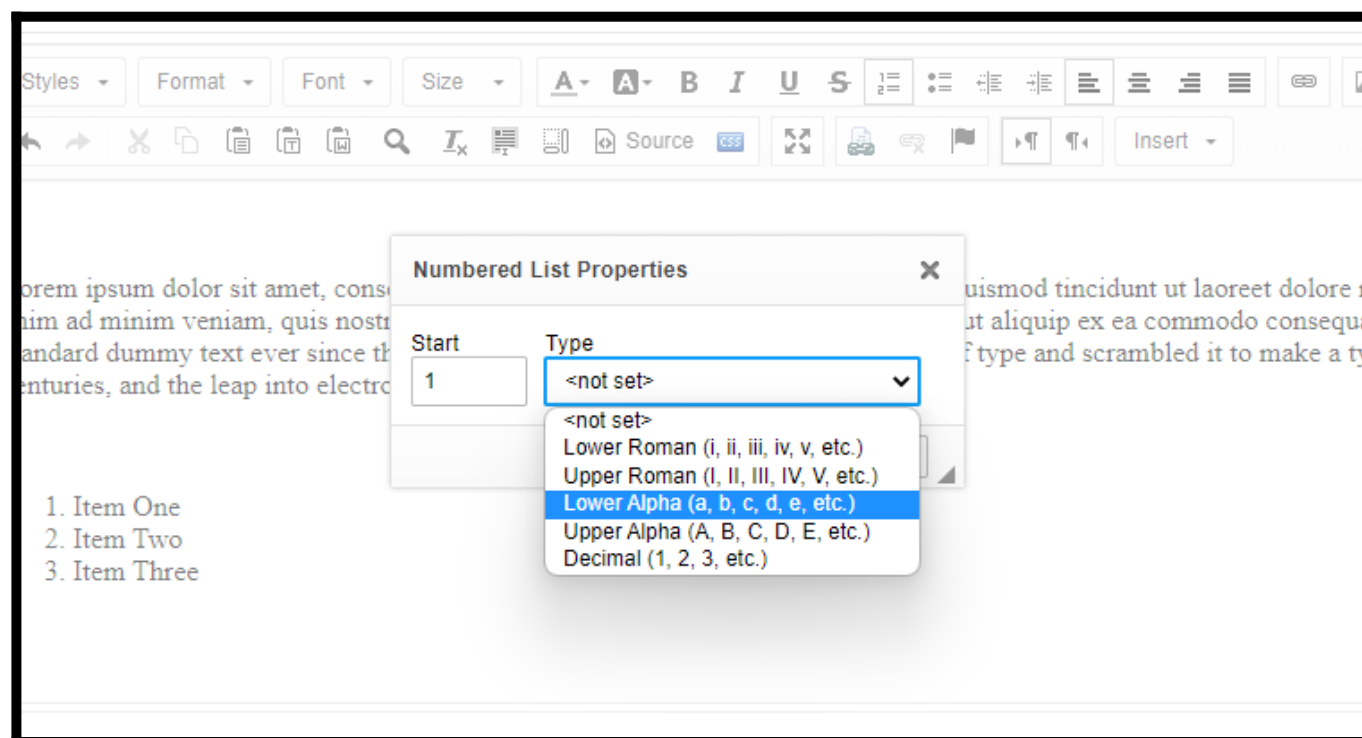
For a different type, e.g., lower-alpha:

**Step 1: Right-click** on the ordered list and select **Numbered List Properties**



**Step 2:** In the dialog box, choose the **type**, e.g., Lower Alpha, then click **OK**



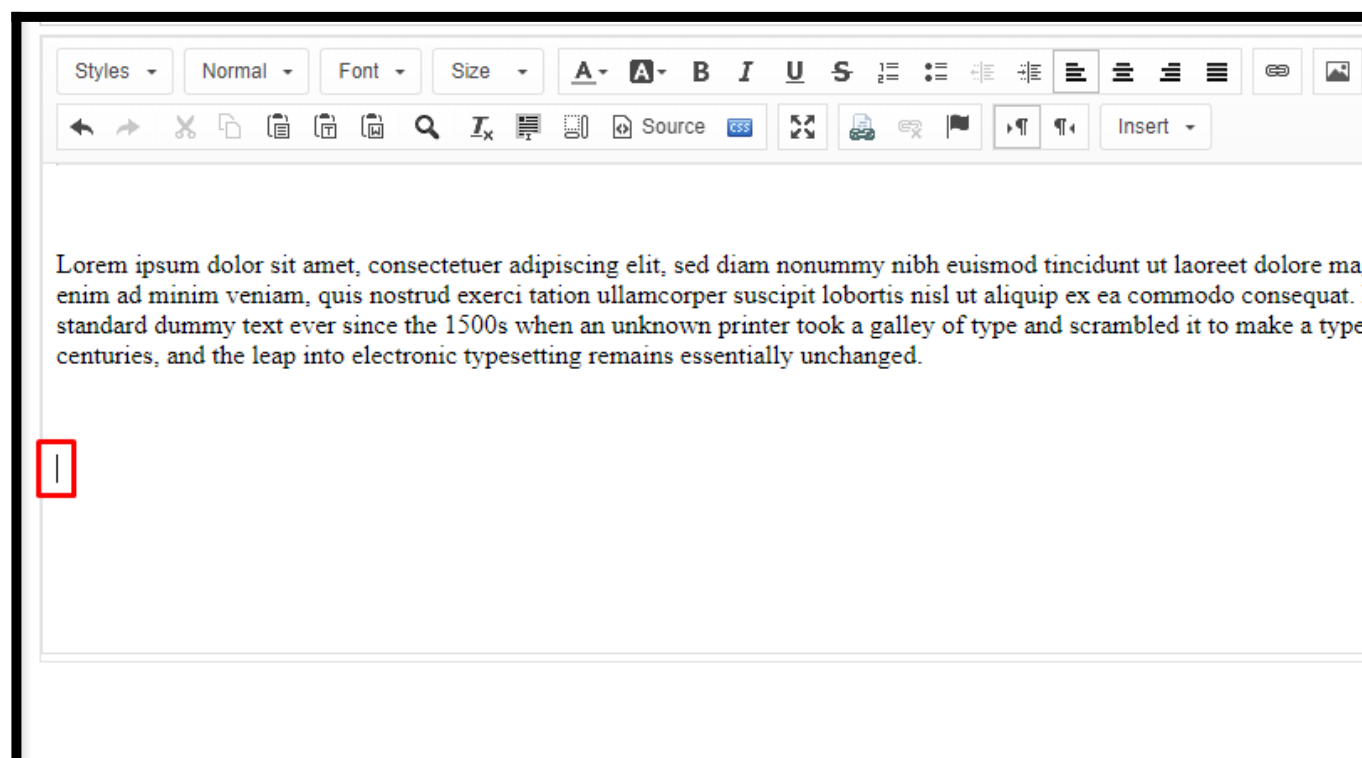


## Bulleted List

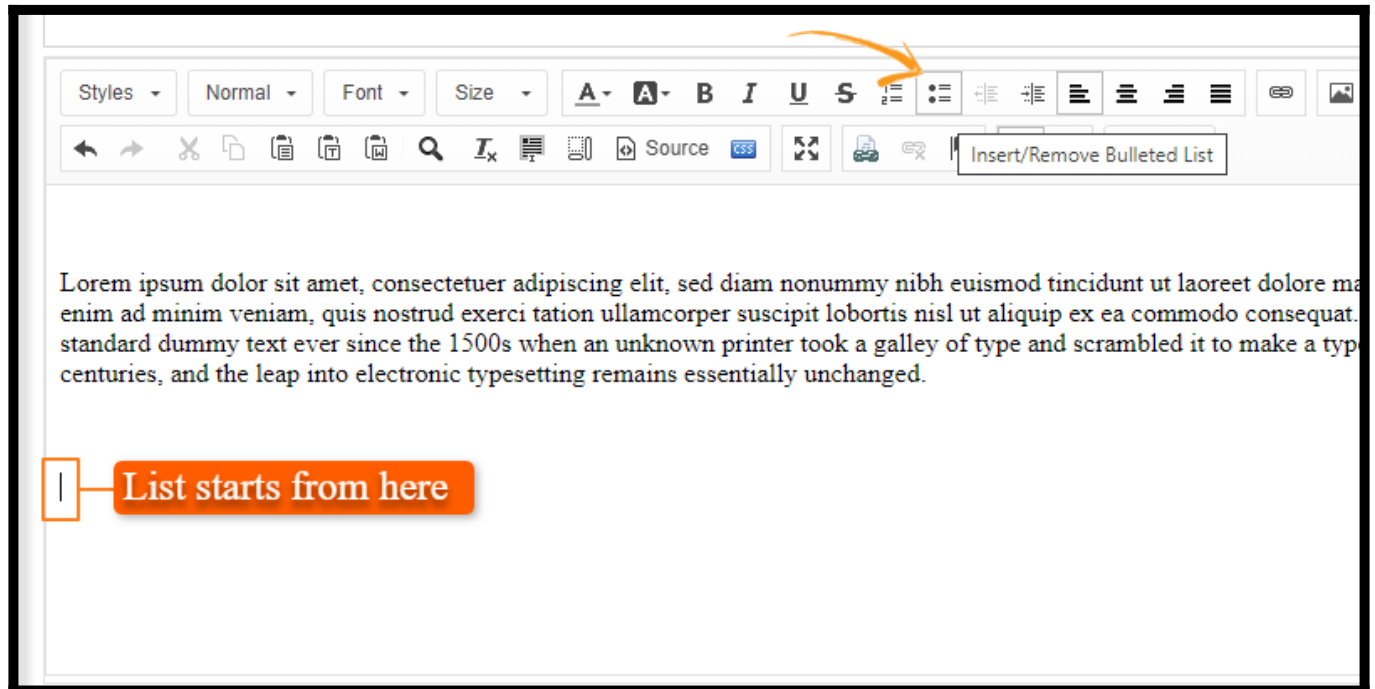
Bulleted lists are useful when you want to set off several items in no particular order.

Follow these simple steps in the page editor to create a bulleted list:

**Step 1:** Move your cursor to where you want to add a list and click to select the starting point

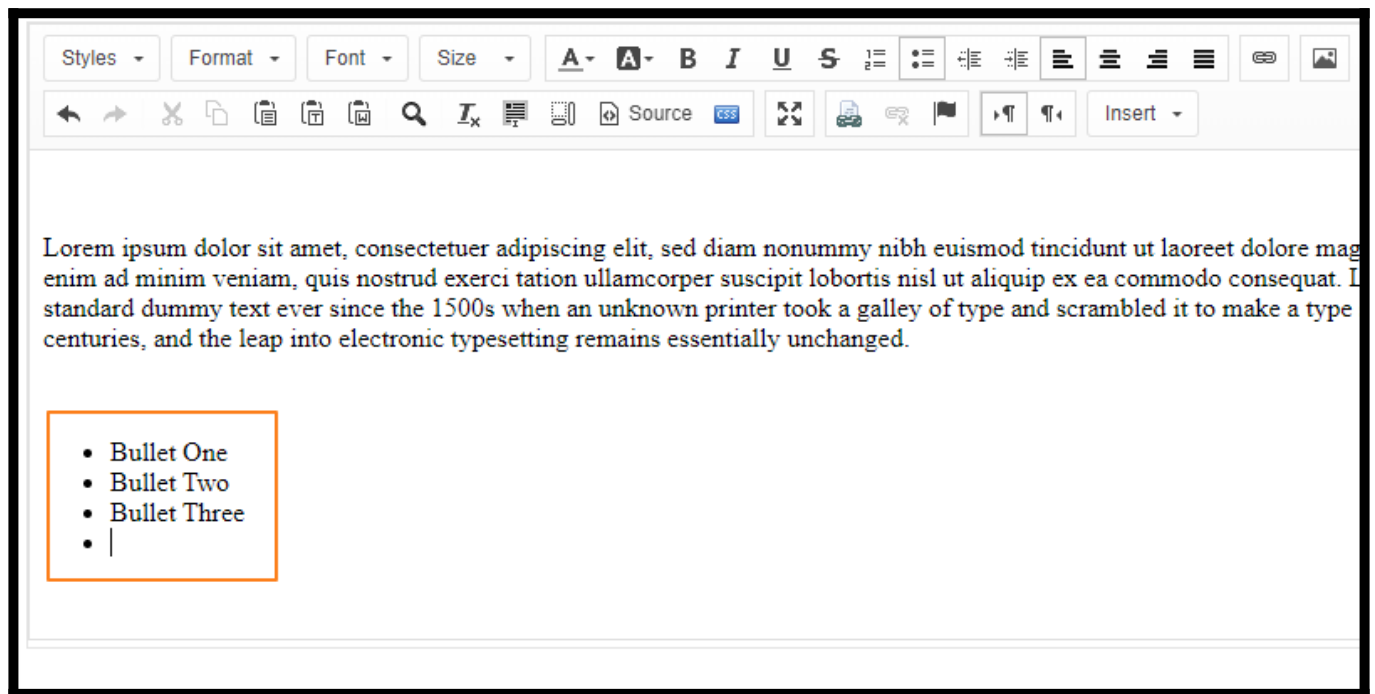


**Step 2:** Click on the **bulleted list** option in the toolbar.



**Note:** A bullet will appear at the beginning of the line of text where your cursor is, and the line will be indented.

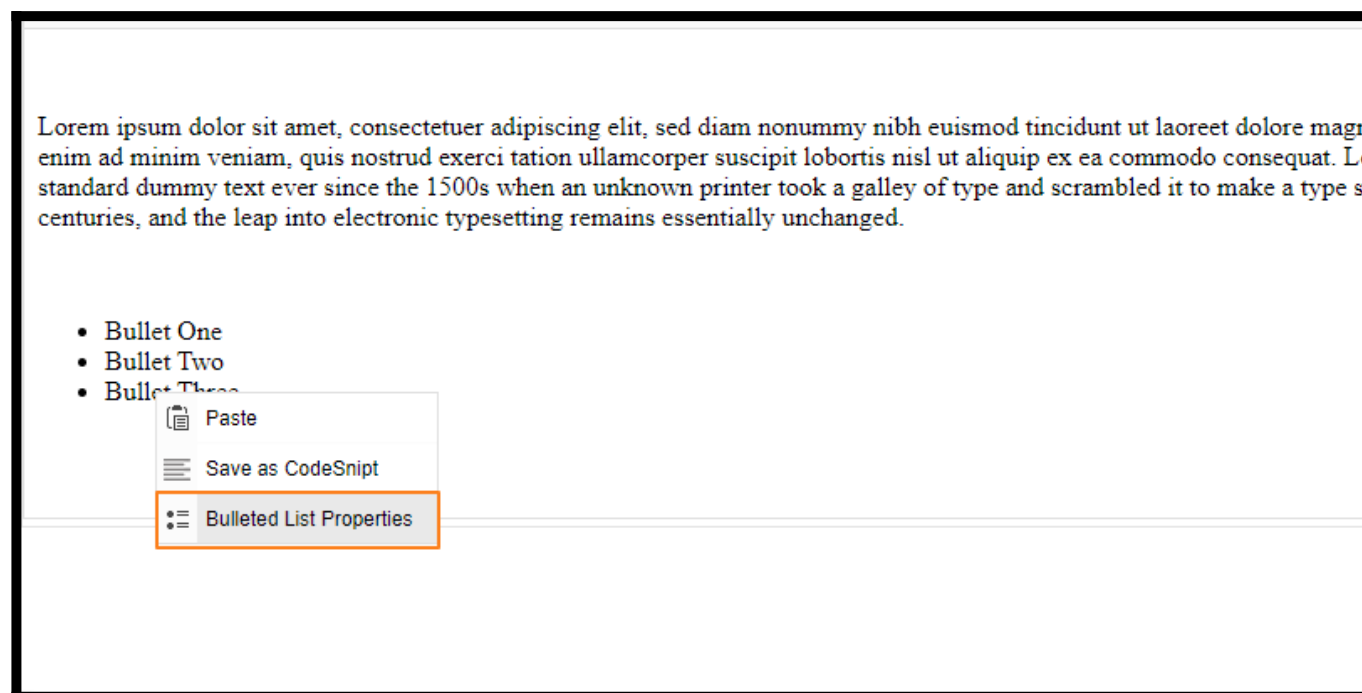
**Step 3:** Hit the **Return/Enter** key at the end of the bulleted line of text to add one more list item



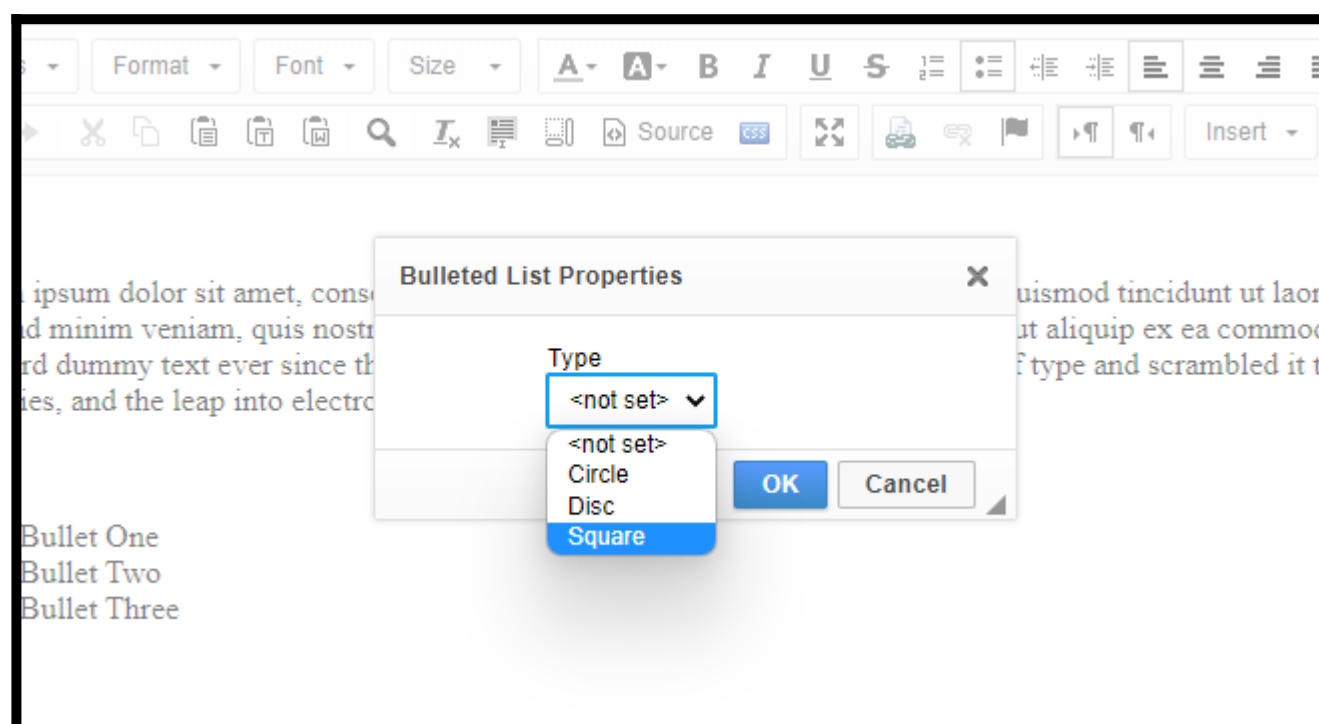
**Note:** To end the list, click on the bulleted list option again or hit enter twice.

**For a different type:**

**Step 1:** Right-click on the unordered list and click **Bulleted List Properties**.



**Step 2:** In the dialog box, choose the **type**, e.g., Square, and then click **OK**



*That is all about creating ordered and unordered lists in the ProProfs Knowledge Base.*

## Related Articles

- [Tables](#)

- [Links](#)
- [Videos](#)

# How to Upload or Embed a Video in a Help Article

ProProfs Knowledge Base lets you easily embed videos from popular platforms like YouTube, Vimeo, and Blip.tv, or you can upload videos directly from your local drive.

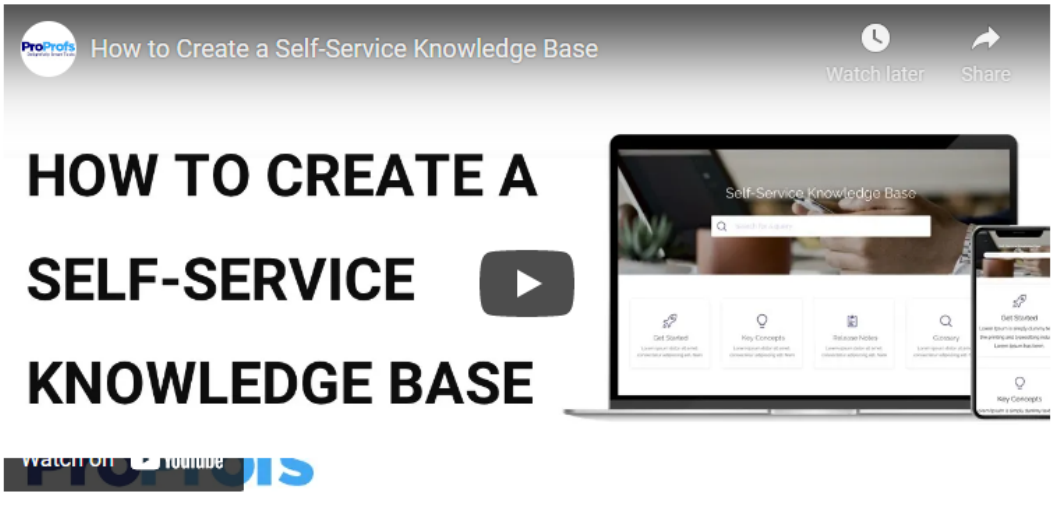
Videos are great for walk-throughs, demos, presentations, and more. When adding a new page, you can specify it as a **“video”** page so users can quickly identify it in the table of contents (TOC) and the search results.

**Here’s what an uploaded or embedded video will look like in an article:**

## How to Create a Knowledge Base

Create and manage multiple help webpages on your website with ProProfs Knowledge Base. Each help site can have its color theme, CSS, domain name, and other features.

Watch this **quick video** to learn how to create a knowledge base.



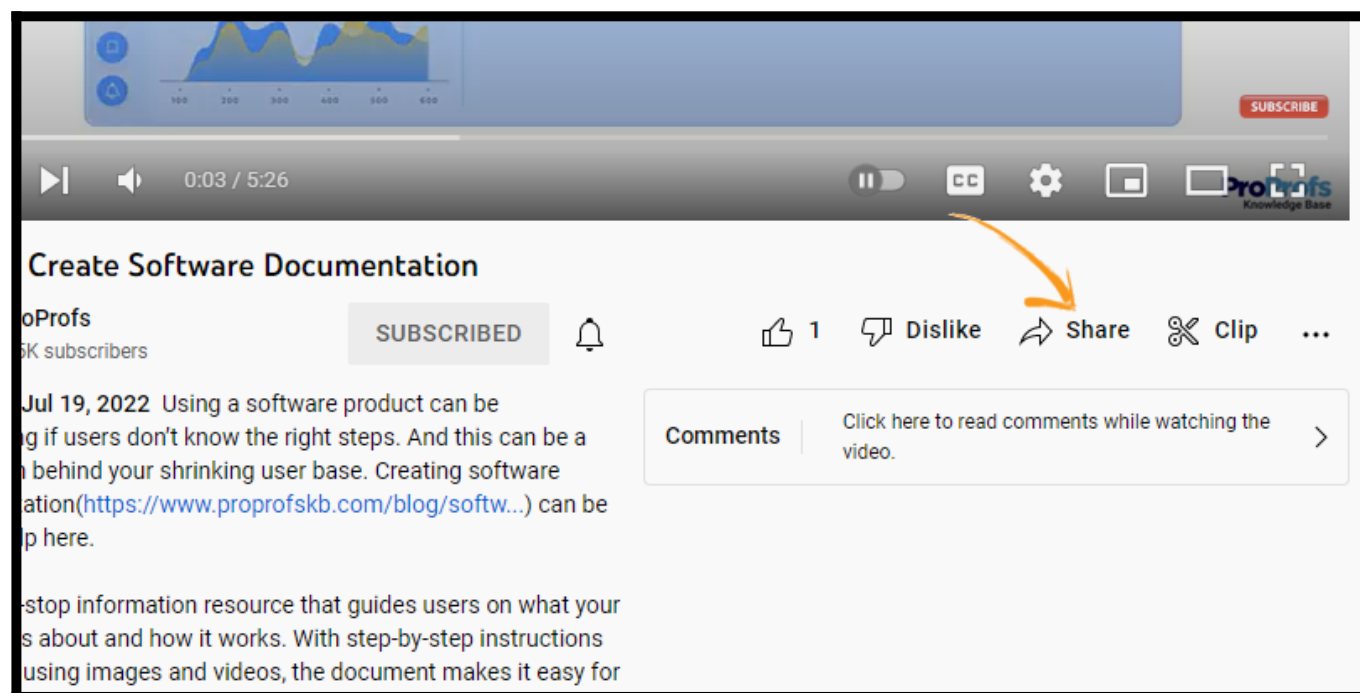
Or **continue reading** to understand it step-by-step.

In this article, you'll learn:

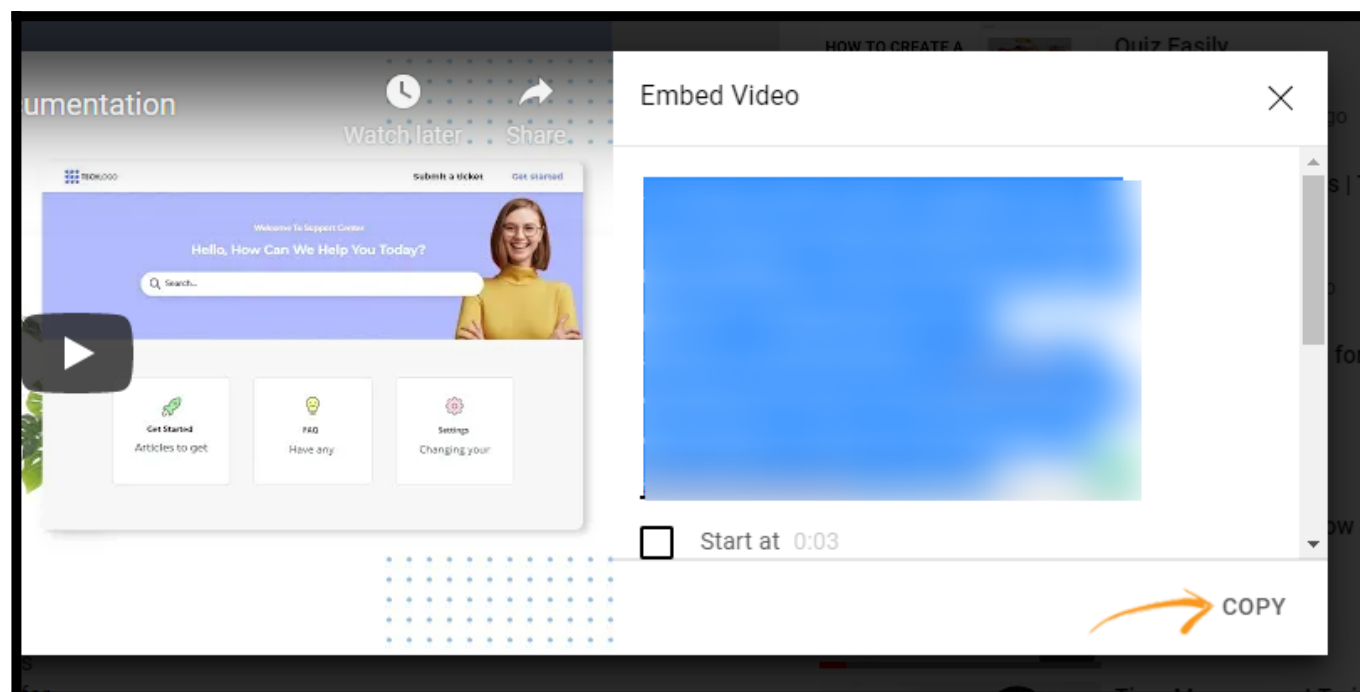
- [How to Embed a Video](#)
- [How to Upload a Video](#)

# How to Embed a Video

**Step 1:** Navigate to the YouTube video page and click **Share**

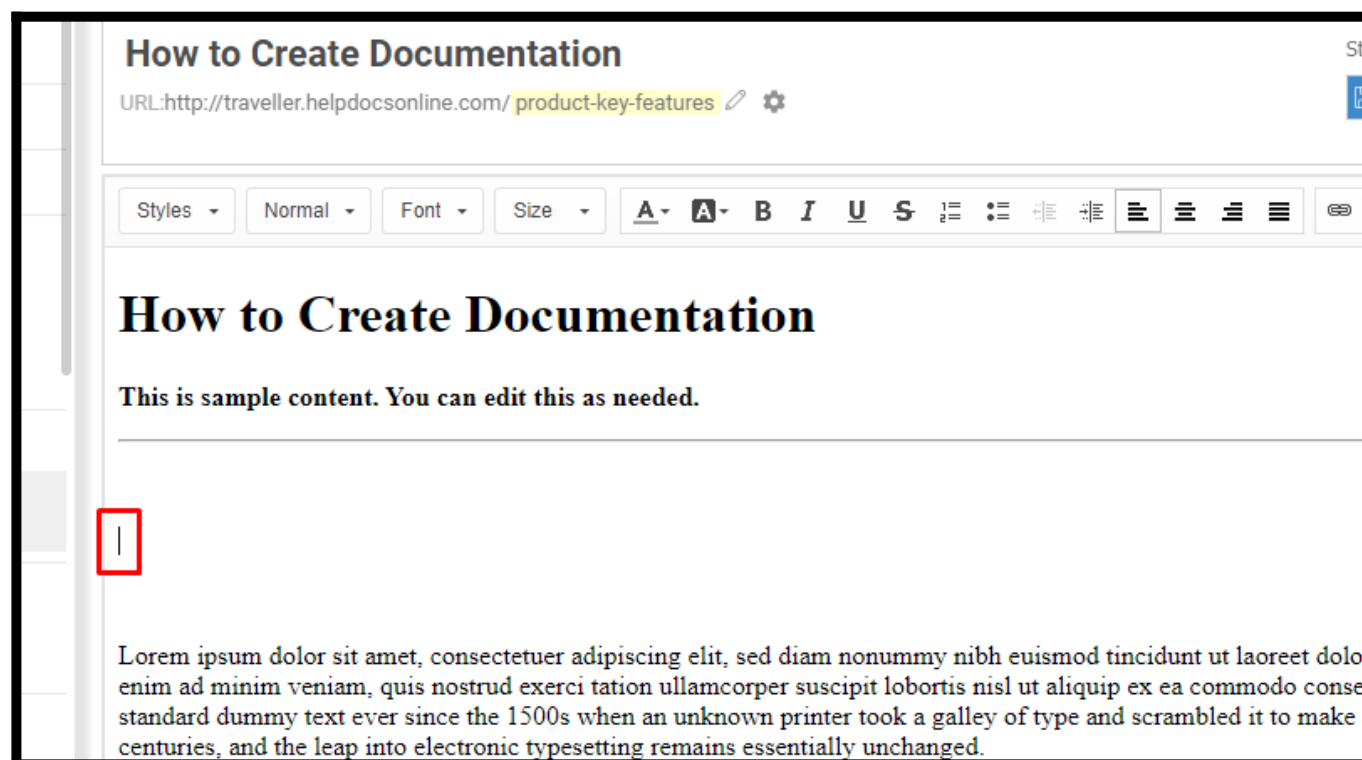


**Step 2:** Go to the embed option and copy the code

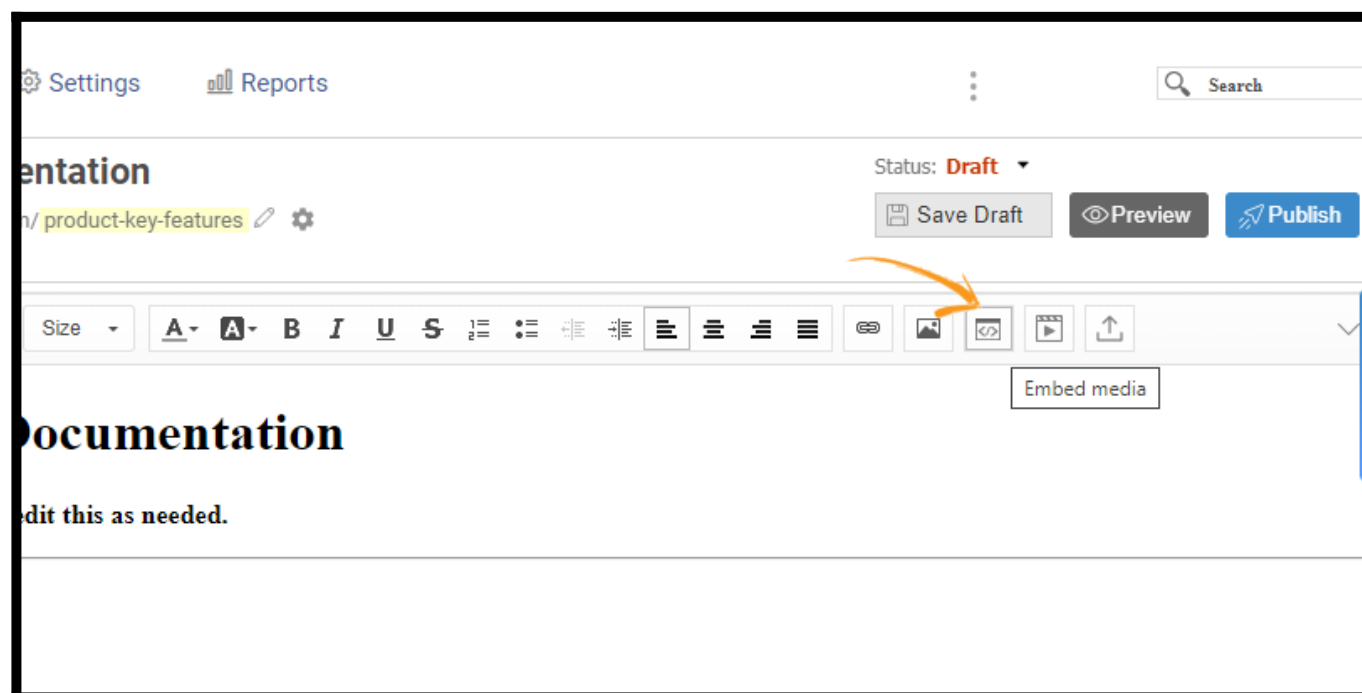


*Alternatively, you can right-click on the video and select **Copy Embed Code**.*

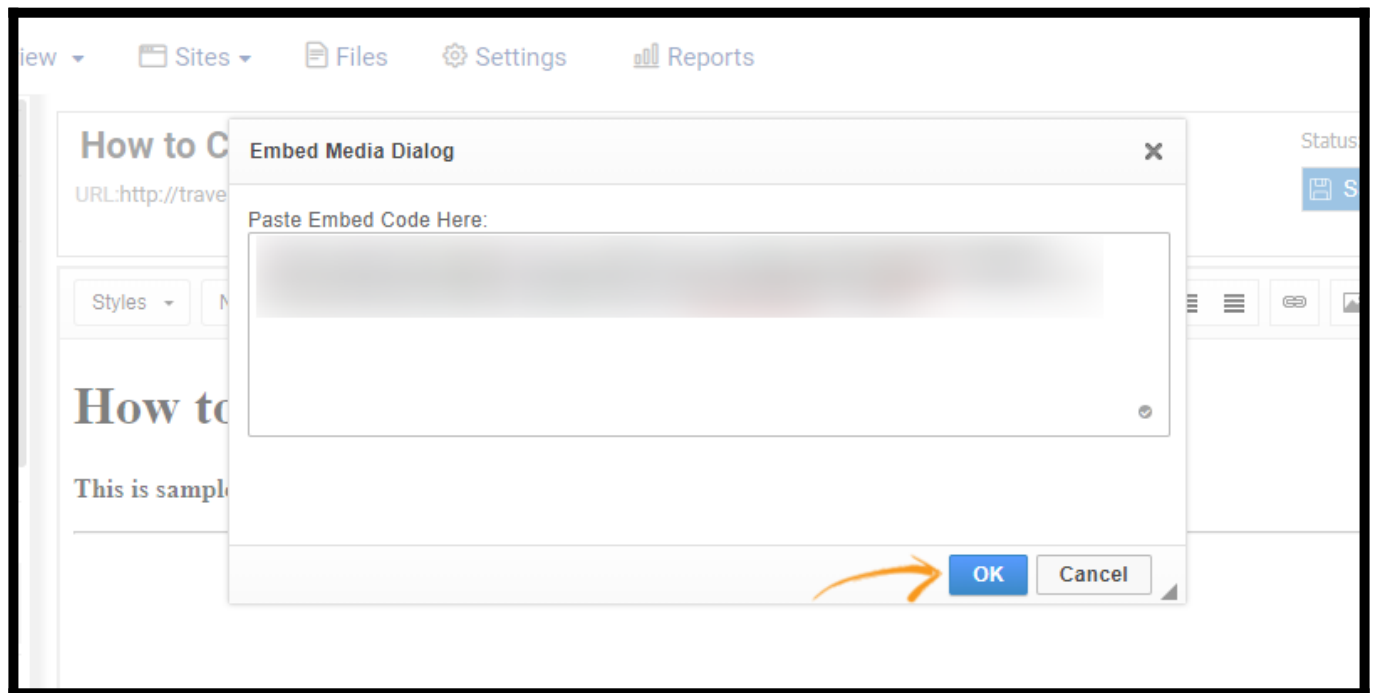
**Step 3:** Open the Knowledge Base Page Editor and place the "text cursor" at the appropriate location on the page.



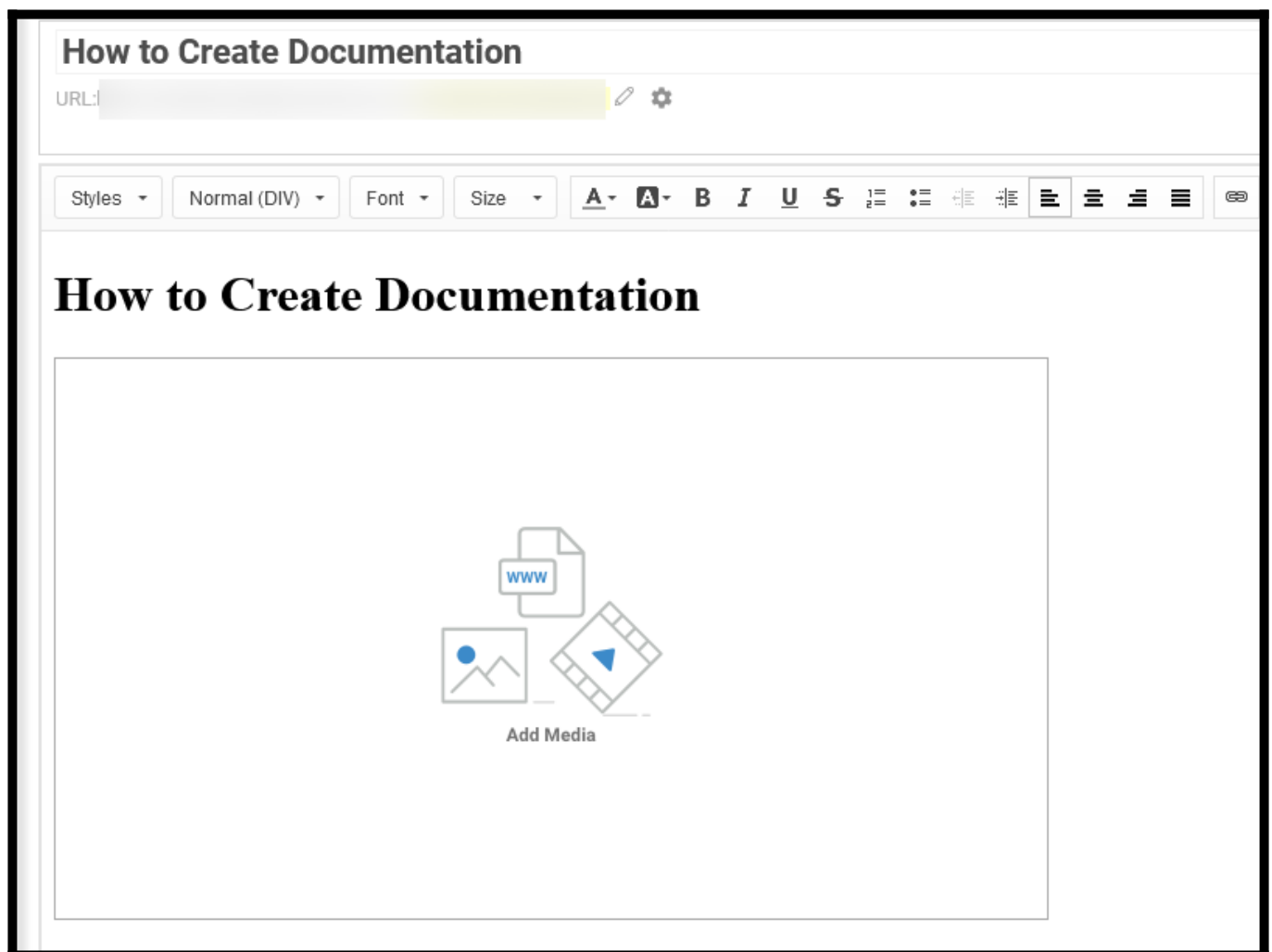
**Step 4:** Click the **Embed Media** button.



**Step 5:** Paste the embed code in the "**Embed Media Dialog**" box and click **OK**. The video is added successfully.



Here's how the **embedded video** will appear in the editor:

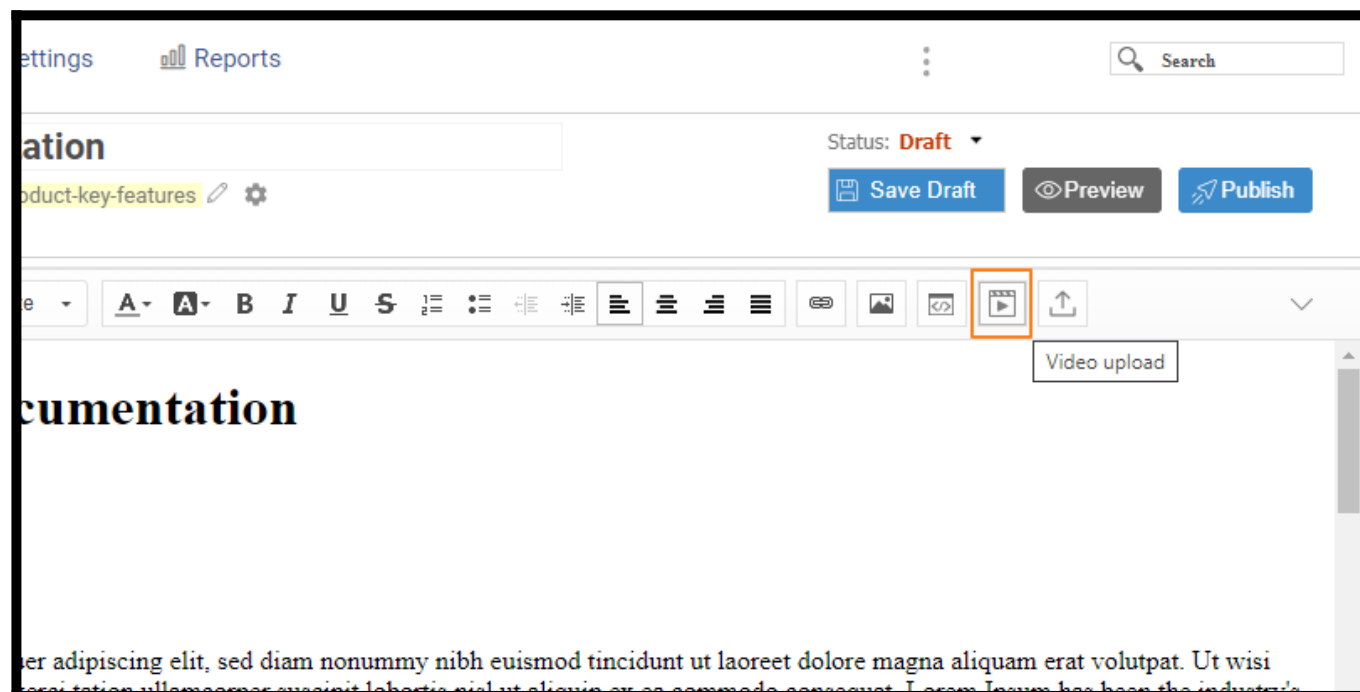


You can double-click the video to open the properties.

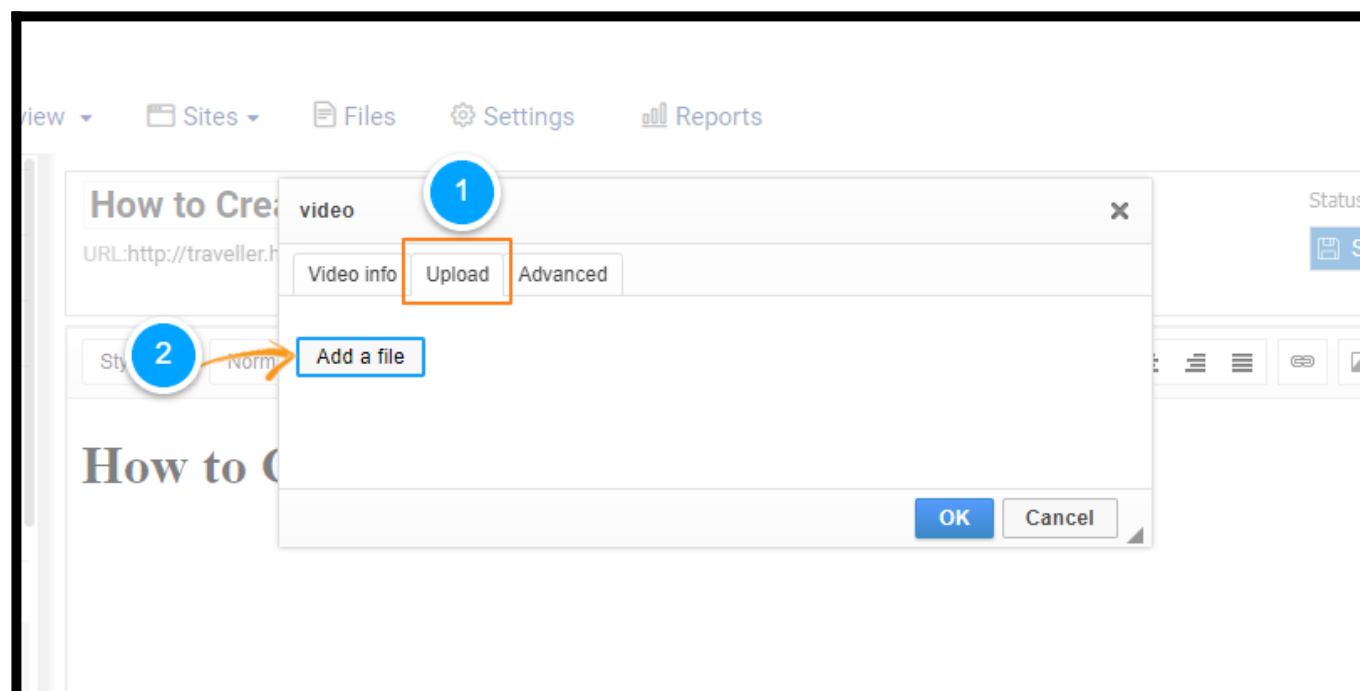


## How to Upload a Video

**Step 1:** Click the “Video Upload” button from the toolbar

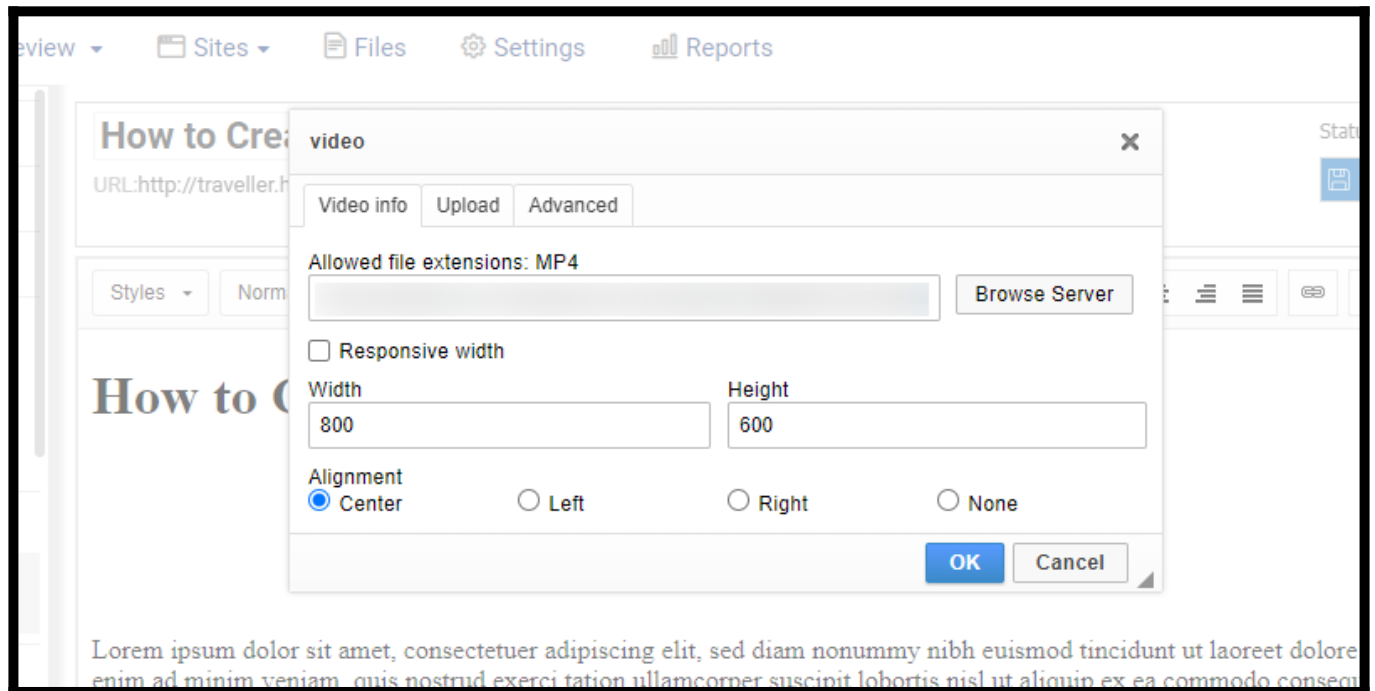


**Step 2:** Go to the Upload tab in the dialog box and click Add a file



**Step 3:** The file you select to upload automatically gets added to the user media library for re-

use. You can adjust the alignment and set custom width & height. Once done, click **OK** to add the video.



**Note:** You can enable autoplay under the *Advanced* tab.

*That is all about uploading or embedding videos.*

## Related Articles

- [File & Image Manager](#)
- [Tables](#)
- [Editor Toolbar](#)

# CSS

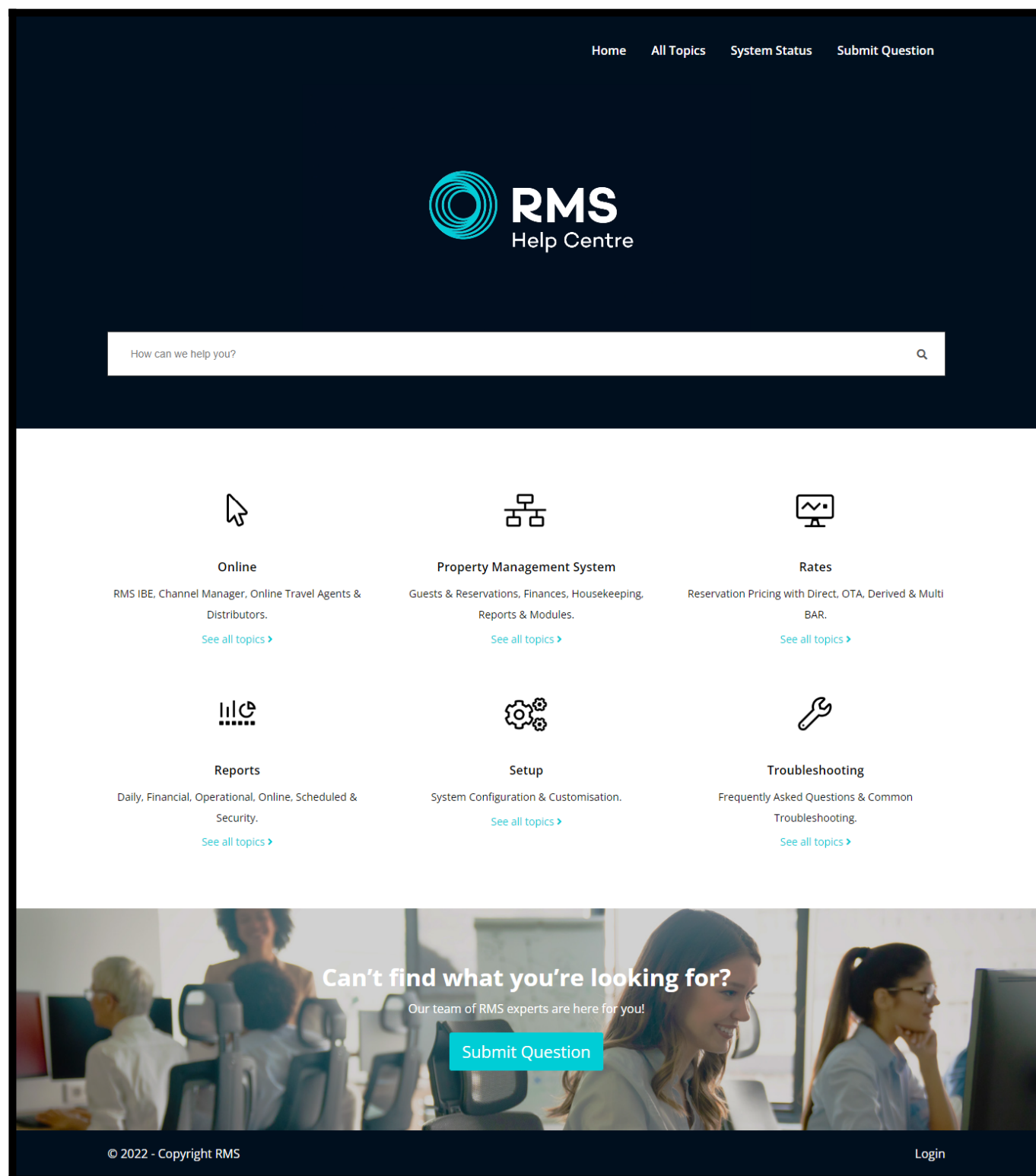
CSS stands for **Cascading Style Sheets**. It allows you to format & style web pages.

CSS is a design language that helps you enhance the layout, visual structure, and overall aesthetics of your help site. In this article, we will refer to the **site-wide CSS**. Therefore, even when you edit a page's CSS, it will reflect on the entire site.

***Note:** Each site comes with default CSS styles.*

**Here is an example of a site powered by ProProfs Knowledge Base using its CSS styles:**


The client has modified CSS, from color scheme to fonts & other visual aspects, to overhaul the look & feel of our standard ProProfs Knowledge Base product.



## CSS has several benefits:

- It allows you to store style presentation information (such as colors, fonts, layout, etc.) separately from your HTML structure.
- It gives you precise control over your page's design and format.

- It reduces the use of code, thus enabling fast page speed.
- It allows responsive web designs for a better user experience across devices.

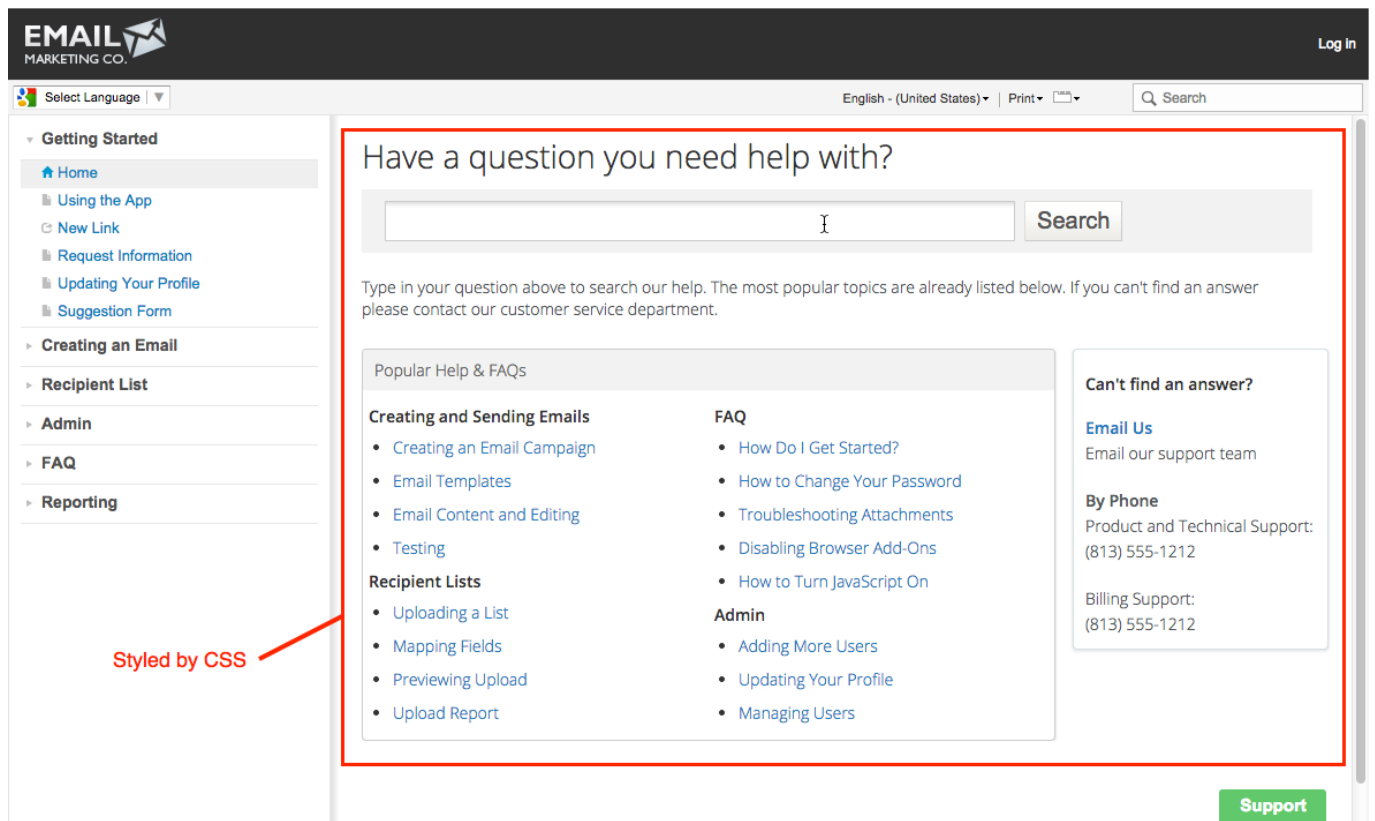
These CSS editing instructions are meant for users with knowledge of CSS. If you are  new to CSS or need a refresher, check out this great resource: <http://codex.wordpress.org/>.

**This article covers the following:**


- [Add or Edit CSS](#)
- [Applying CSS Styles](#)
- [Styles and Format Drop-Downs](#)
- [Changing the Default Font](#)
- [Reverting to the Default CSS](#)
- [Multiple Sites and CSS](#)
- [Mobile/Tablet CSS](#)

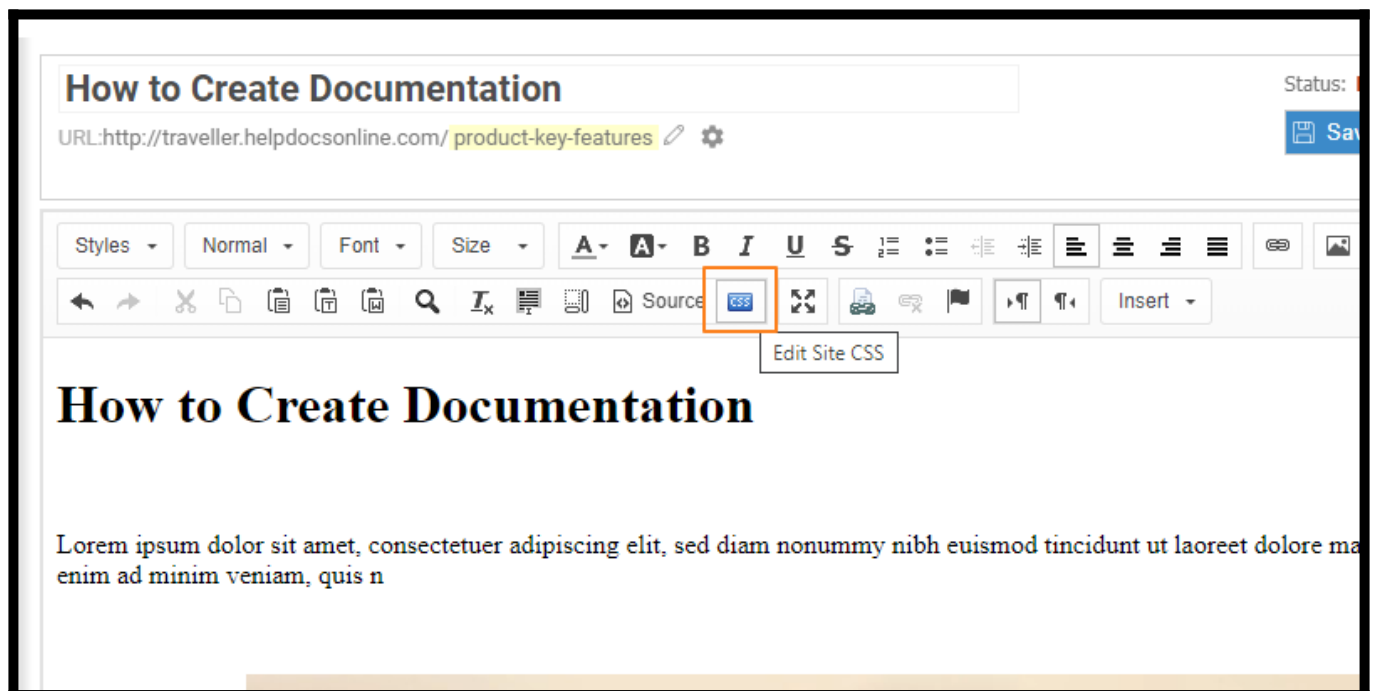
---

You can change a **page's CSS**. However, you cannot change the application's CSS. Customizing the site can control the theme, header, and other options.

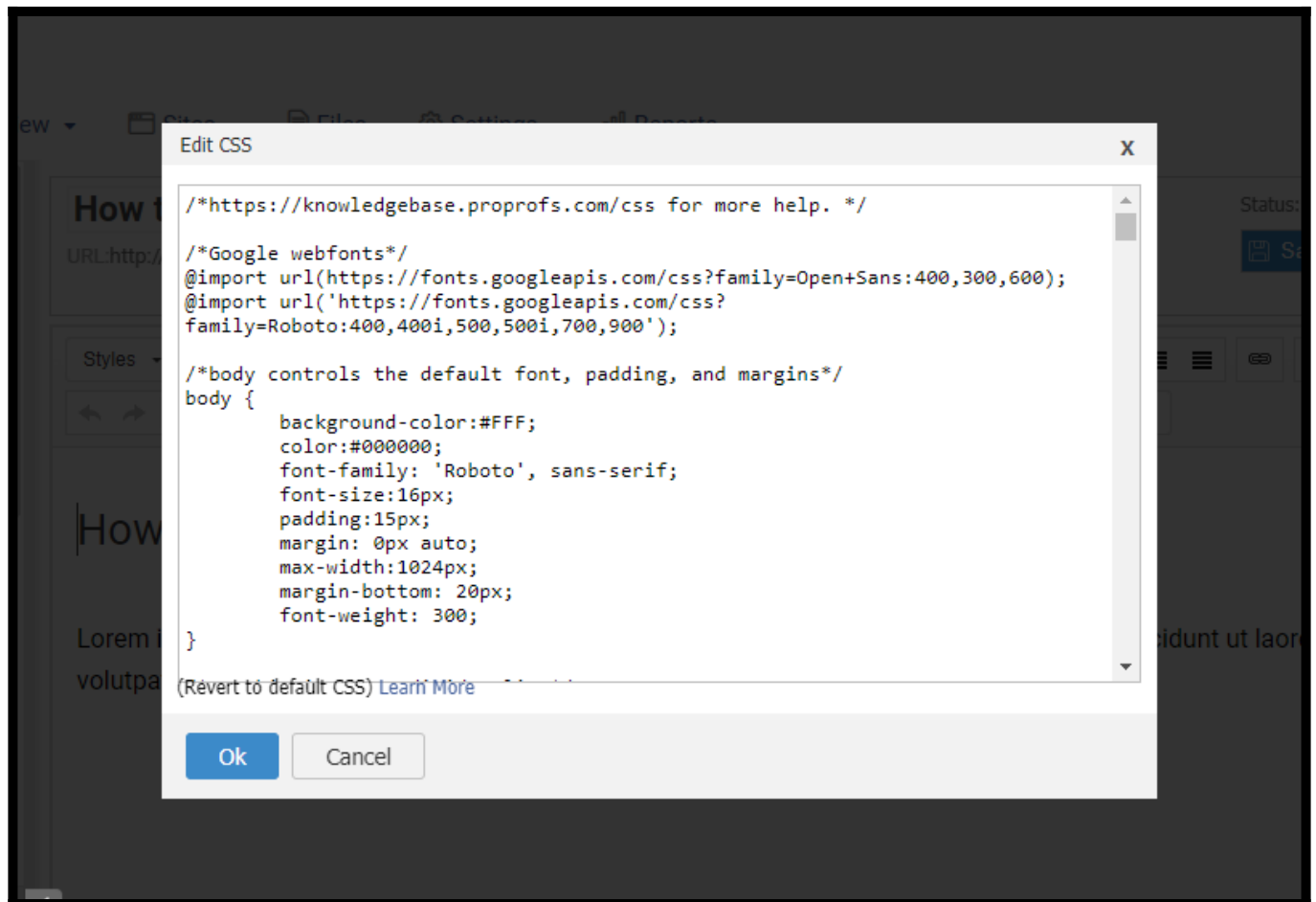


## Add or Edit CSS

**Step 1:** Click the CSS () toolbar button in the page editor. An overlay will appear displaying your site's CSS.



**Step 2:** You can add or edit the CSS as you wish.



The CSS file comes with the system's default style. However, you can modify any of these styles.

It includes:

- **The default font style:** `body {}`
- **Bullet and list styles:** `ul {}`, `li {}`, `ol {}`
- **Table** styles and classes
- **Horizontal Rule:** `HR {}`
- **Hyperlink colors and styles:** `a{}`, `a:link`, `a:visited`, `a:active`, `a:hover {}`
- **Styling for the home page:** `#startcontainer {}`

You are allowed to change any of the default CSS. You can also add more CSS styles and classes to control the layout of any page.

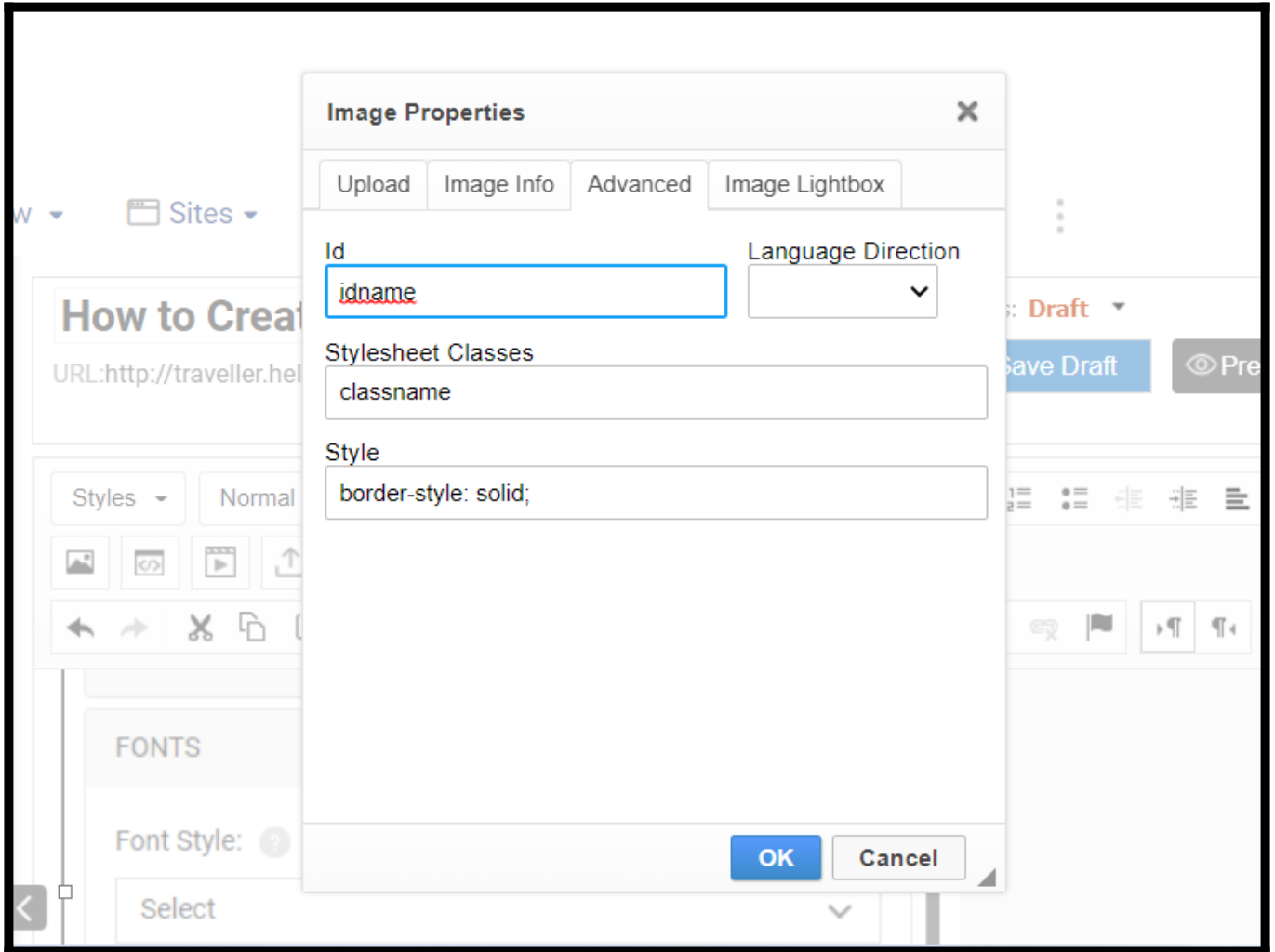
## Applying CSS Styles

You can manually apply CSS to different page elements such as Image(s), Link(s), and Table(s), among others.

## To apply CSS:

- **Double-click** on the element and go to the **Advanced** tab.
- **Enter** the CSS class name or ID you want to **apply** to the element.

Below is an **example** of an image:



## Styles and Format Drop-Downs

The CSS powers the toolbar's styles, format, and other options. If you want to change the formatting, such as the fonts, sizes, colors, etc., you will need to do it in the CSS.

Below is the mapping of  elements in the CSS.

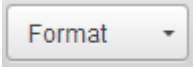
### Styles Drop Down

Computer code  
Computer code 2  
Tip  
Info  
Warning

### CSS Class

```
.computer_code, code {  
.computer_code, code {  
.tip {  
.info {  
.warning {
```



Below is the mapping of  elements in the CSS.


Format Drop Down	CSS Class
Normal	P { , Body {
Heading 1	H1 {
Heading 2	H2 {
Heading 3	H3 {
Heading 4	H4 {
Heading 5	H5 {

The Styles drop-down will display your custom CSS classes if you use **TAGNAME.CSSNAME** in your site's CSS. You must define the type of element, such as **div.classname**, **h2.classname**, etc. If you enter **.classname**, it will not appear in the drop-down.

## Changing the Default Font

 **Note:** The following operation is only for advanced users.

You can change the default font for all pages using the below steps:

1. Click on the  CSS icon in the toolbar.
2. Locate the Body {} class at the top of the list.
3. Locate the font family attribute and font size as highlighted below.

```
body {  
background-color:#FFF;  
font-family: Verdana, Arial, Helvetica, sans-serif;  
font-size:12px;  
padding:15px;  
margin: 0px;  
margin-right: 0px;  
margin-bottom: 20px;  
}
```

4. Make the change and click **OK**.

Here are some web-safe font options to COPY and PASTE :

- font-family: Verdana, Geneva, sans-serif
- font-family: Georgia, "Times New Roman," Times, serif
- font-family: Arial, Helvetica, sans-serif
- font-family: Tahoma, Geneva, sans-serif
- font-family: "Trebuchet MS", Arial, Helvetica, sans-serif

- font-family: "Lucida Sans Unicode", "Lucida Grande", sans-serif

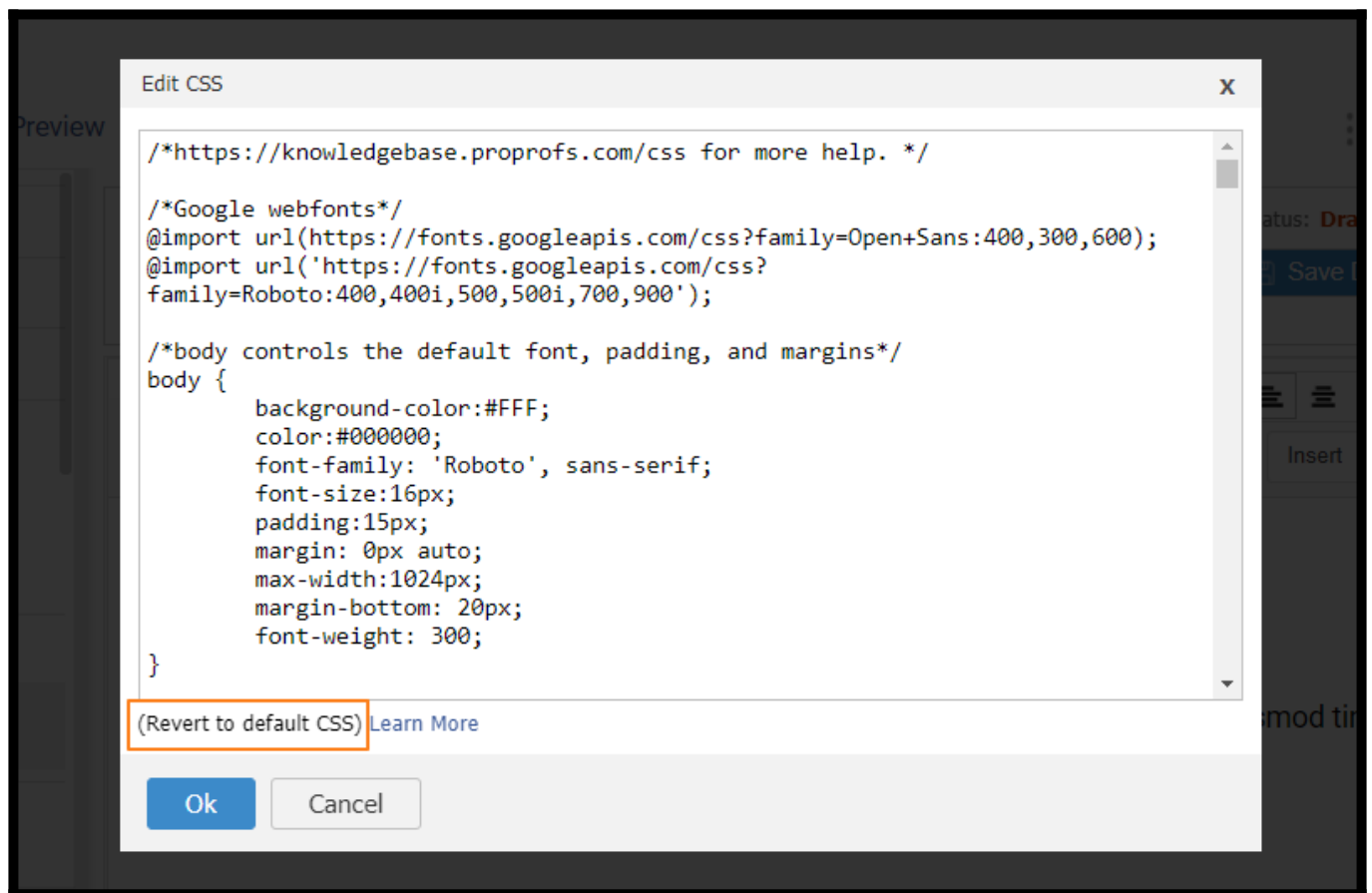
You can also follow this guide for changing the paragraph and heading styles.

## Reverting to the Default CSS

If you break or damage the CSS code, you can click **Revert to default CSS** to **restore** the CSS to the original setting.

***Note:** When you revert to the original, it will erase your previous modifications.*

1. Click **Revert to default CSS** and hit OK.
2. **Refresh** the page to restore the original CSS setting.



## Multiple Sites and CSS

Each site you create will have its separate CSS styles. Sites do not share CSS styles.

If you want to use the same CSS styles from a site you already created, you will need to copy the CSS from one site and paste it to the new site.

*That is all about modifying CSS styles in ProProfs Knowledge Base.*

## Related Articles

- [Code Highlighter](#)
- [Editor Toolbar](#)
- [Links](#)

# How to Use Single Sourcing

ProProfs Knowledge Base is packed with powerful features which make your documentation experience a breeze.

**Single Sourcing:** Single Sourcing allows you to source a piece of content across different places in your documentation. ProProfs Knowledge Base offers multiple methods to use the same piece of content at different places in your documentation so that you don't need to write it again and again.

ProProfs Knowledge Base allows you to use Single Sourcing in 4 different ways:

## 1. [Sync Page](#)

Sync Page allows you to make the same page appear at multiple locations in your documentation. So, suppose you have an article that is relevant to three folders. You can create it in one folder and sync it at the two additional spots. All edits are centrally managed since its one page. Editing the page will automatically update all places it loads at.

## 2. [Merge Tags](#)

A merge tag is a small placeholder tag that may consist of a few words or strings of text, which you can add to any page on your help site. The text you add to the page is not formatted and is stored as plain-text on publishing the page. Merge tags are flexible and reusable, making it simple to make site-wide changes by editing the merge tag source instead of having to modify many pages, separately.

**For example:** You name a tag as "first name" and keep it's value as the first name of user. So, instead of manually typing each user's name, you can just add the "first name" tag and it will automatically fetch the user's first name.

## 3. [Multibranded Sites](#)

You can apply many different branding styles to a single site. This saves you tons of time as you don't have to manually recreate the content for each site. Simply add a new site and brand it as per your requirements.

## 4. [Content Snippets](#)

Content Snippets are similar to Merge Tags, however, Merge Tags are used for small texts while Content Snippets are used for huge chunks of content which are media rich. This is a way to single-source a piece of content that you regularly use in different pages.

**For example:** You might have information such as copyrights, disclaimers, headers/footers, contact information or an image that is repeated in every help article. With single sourcing/content snippets you can create an article/topic once and then re-use the contents of this topic in other articles.

You can instantly update a number of things, such as the design of the page (header/footer), copyrights, or a piece of content on the page (text/images) by simply updating the content

snippet.

**Note\*** You can also create new knowledge bases by simply replicating your existing one. Any change you make on the new knowledge base will not affect your existing knowledge base in any way.

# How to Use Search in ProProfs Knowledge Base

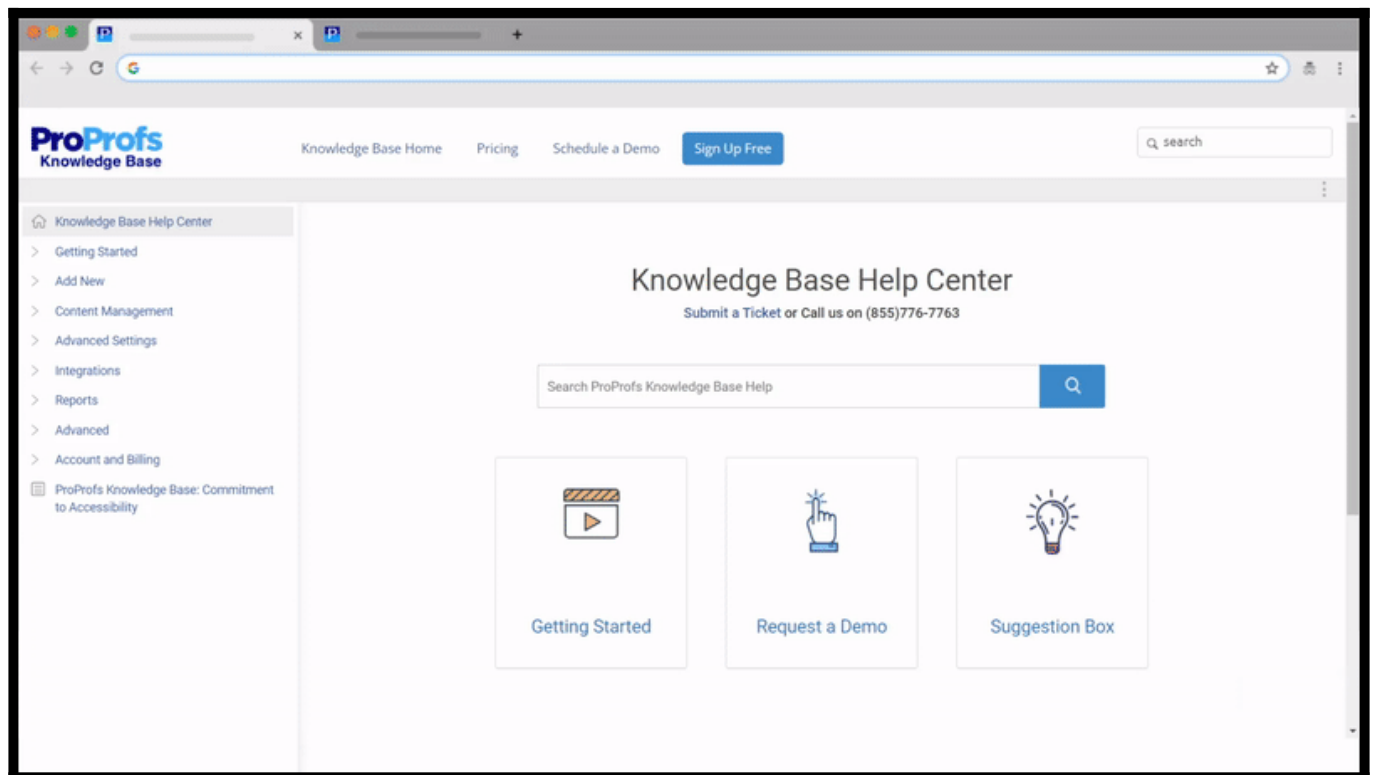
ProProfs Knowledge Base supports a robust search functionality that lets users quickly find the desired information.

You can easily add this search box to your website or web application to minimize user navigation efforts.

**The search box can help users:**

- Find relevant results against their query by typing a keyword or string of keywords
- Troubleshoot their issues and save time & effort in contacting the support team

**A preview of the search feature in the ProProfs Knowledge Base:**



**Table of Contents:**

- [Page Suggestions](#)
- [Full-site Search](#)
- [Keywords](#)
- [How does ProProfs Knowledge Base Search Work?](#)
- [How to Hide a Page from the Search Results](#)

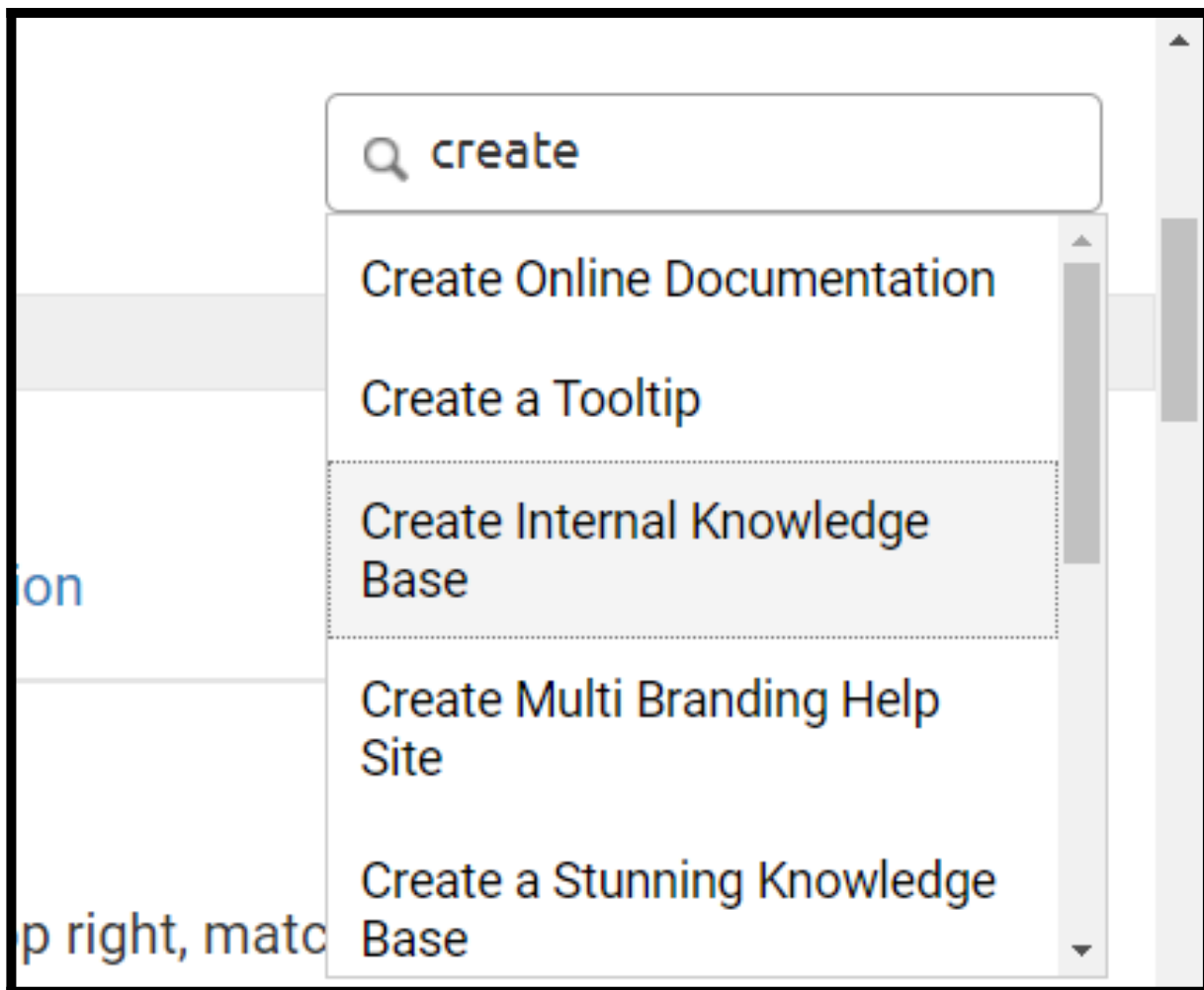
- [How to Hide Search Box from Home Page](#)
- [How to Add a Search Box to a Page](#)
- [How to Add a Search Box to Your Website or Web Application](#)

---

## Page Suggestions

When you enter text into the search box located on the top right, matching page suggestions will appear to help you quickly navigate to the desired page.

The page title matches the suggestions. You can choose one of the suggestions to navigate directly to the page. Else, you can ignore it and perform a site search.

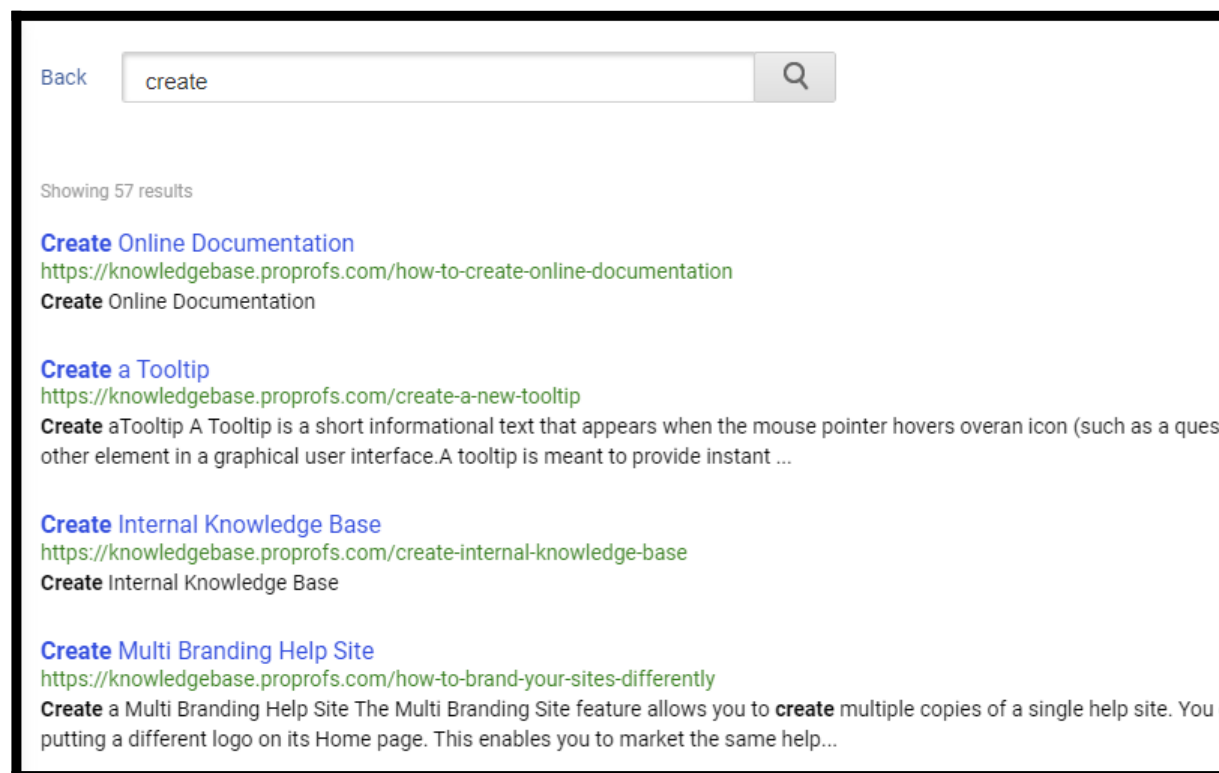


**Hover the cursor** over to the **title** and **click** on it **to open**. You can also **scroll** to see more suggestions.

## Full-site Search

The algorithms will perform the search sitewide. **Draft pages** and **pages marked to be excluded** from the search **will not return** in the results. Search will match with each page's content, page title, search keywords, and table of contents name.

To perform a search, simply **enter the search text** into the search bar and click on the search icon, or hit Enter.



- If you are in **Tab View**, the search results will open in a new tab.
- To **open a search result**, click on that page title in the search results.
- The searched keyword will appear in **bold** throughout the page.
- If the search keyword is part of toggle content, the toggle content will expand and show the searched keyword.

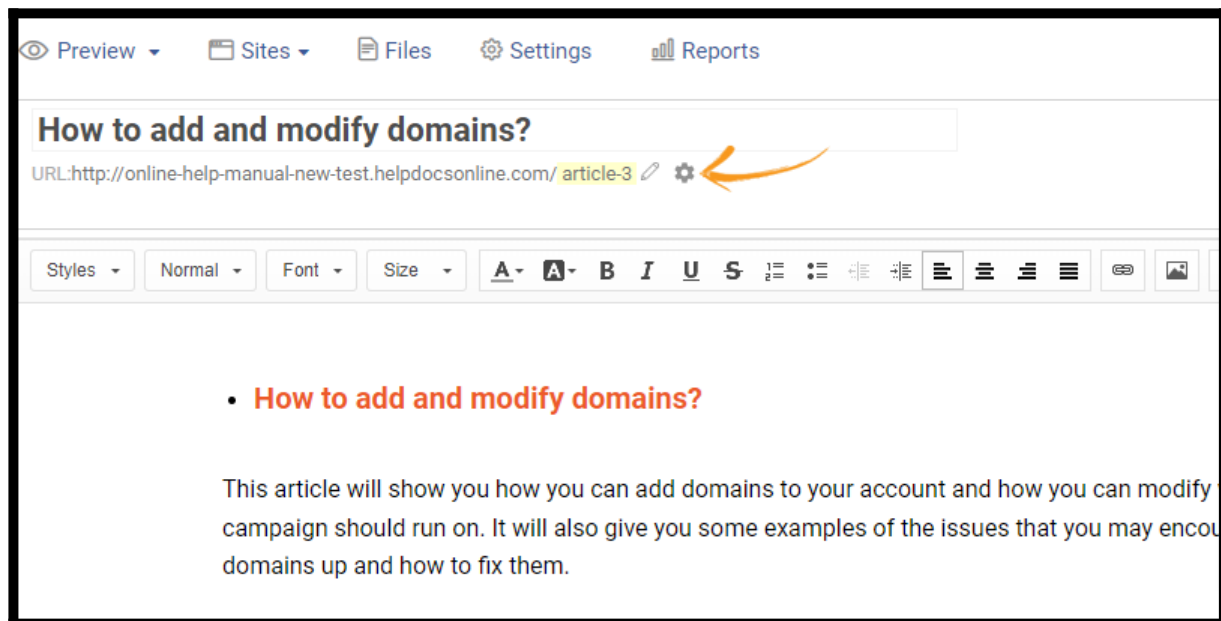
## Search Keywords

Search keywords allow you to provide additional searchable text and targeted keywords for a page, such as *"password, password reset, lost password, forgot password,"* that the system will use when performing a search.



In the page editor,

- Click on the **gear icon** for more settings.



- Enter **keywords** in the search results box.
- Check **the box** next to “**Show page in search result.**”
- Click **Save**.

**Basic**   **Advanced**

**Page Type**   ☒ Text   ☐ Video

**Author**  

**Table of Contents**   ☒ Show page in table of contents

**PDF**   ☒ Default page to be included in the PDF

**Search results**   ☒ Show page in search result

Enter search keywords. Seperate each word or phrase by a comma

**Search engines**   ☐ Allow page to be crawled by search engines (Google, Yahoo, Bing)

Enter meta description. Limit to 320 characters

**Feedback**  

**Footer**  

  Cancel

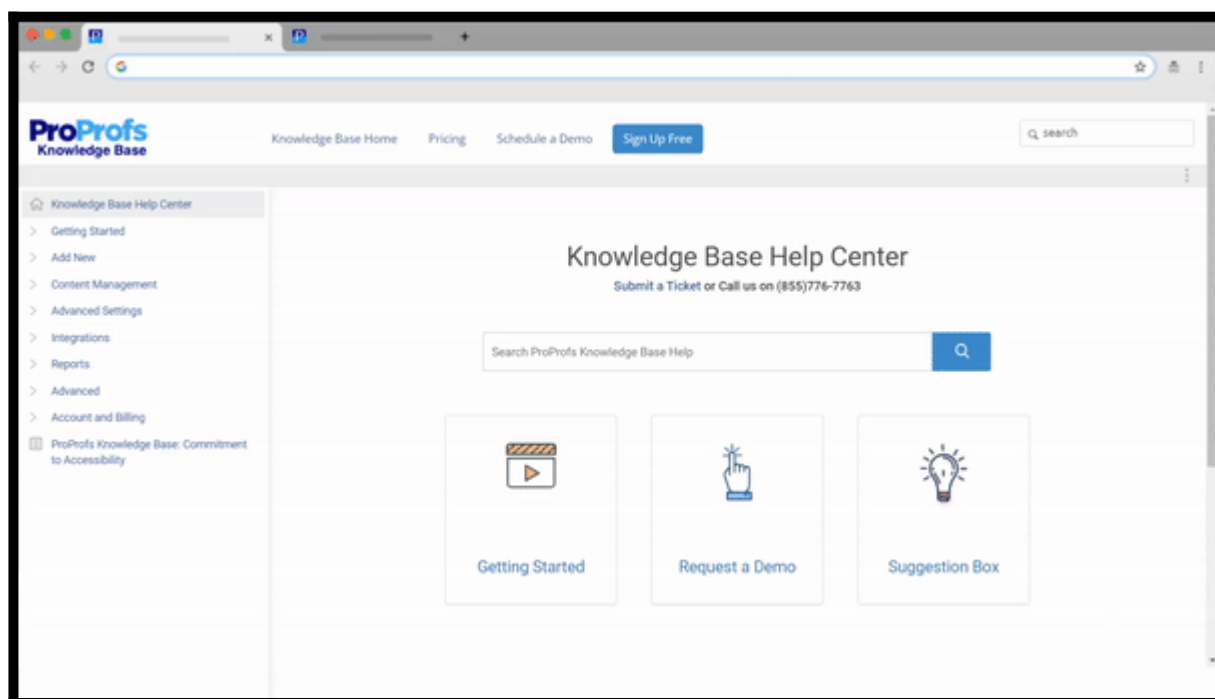
## How does ProProfs Knowledge Base Search Work?

### When you enter a phrase:

The search algorithm **matches the entire phrase** with the article's title, content, and keywords(tags).

Next, it matches the **combination of words** in the phrase with the title, content, and keywords(tags) to show relevant results.

Lastly, it **matches the words** in the phrase **individually** and returns with the articles that contain those words.



## How to Hide a Page from the Search Results

A published page appears in the search results by default. However, you can hide a page from the search results.

- Click on the **gear icon**.
- Uncheck the box next to **"Show page in search result."**

Basic

Advanced

Page Type

Text

Video

Author

DRACO

Table of Contents

Show page in table of contents

PDF

Default page to be included in the PDF

Search results

Show page in search result

add domains, modify domains, how to add domains, how to modify domains

Enter search keywords. Seperate each word or phrase by a comma

Search engines

Allow page to be crawled by search engines (Google, Yahoo, Bing)

Enter meta description. Limit to 320 characters

Feedback

Enable

Disable

Footer

Enable

Disable

Save

Cancel

## How to Hide Search Box from Home Page

If your homepage has a prominent search box on the page, you may not want to have another search box on the top right.

+ Add New

Preview

Sites

Files

Settings

Reports

Glossary

Untitled

Home

> Get Started

> Key Concepts

> Software Settings

> Customization

> Apps & Integration

> Privacy & Security

> Developers

> Release Notes

> Resources

Table of Contents

Index

Edit Home

Search

Global Search Box

System Documentation Manual

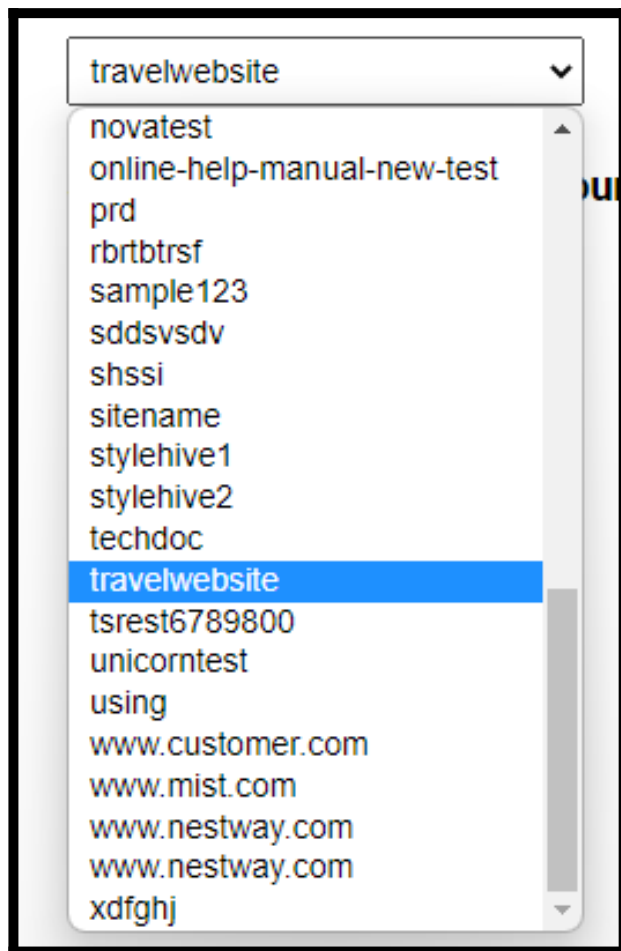
The easiest way for creating Help Site by using ProProfs Knowledge Base Template

Ask question or search by keyword

Search

To hide the search box from the homepage:

1. **Log in** to your account (**as an administrator**) and click **Settings**.
2. Select a **site** from the dropdown.



3. Click **Configure**.
4. Scroll down to the **"Hide global search box on home page."**
5. **Switch** it to **Yes** and **Save**.

Name:

Home Page:  Or Select other page

Hide global search box on home page   1

Breadcrumb:

Show pop-up to notify users when updating or publishing articles:

2

## How to Add a Search Box to a Page

You can also add a search box to any page you create in ProProfs. To **add a search box** to a page, **add the following code** to the page's source code:

```
<div class="head">
<div class="search-kb">
<div class="input-field"><input class="search-field searchbox" id="search-header"
type="search"><input class="btn-blue search-btn" style="background: #3c8ac9;color:
#fff;border: none; font-size:18px;" type="submit" value="Search" ></div>
</div>
</div>
```

This will function as the global search box and return the search results. Learn how to access the [source code](#) of a page.

## How to Add a Search Box to Your Own Website or Web Application

You can also pass a search query from your own website or web application to your ProProfs site. It allows you to add a search box to your own website and pass the search term to your ProProfs documentation site.

**To do this**, you will need to **add a small piece of HTML code** to your website or web application:

```
<input id="txtsearch" />
<input type="Button" onclick="window.open
('http://helpiq.helpdocsonline.com/?search='+document.getElementById('txtsearch').value)"
value="search"/>
```

*Change the URL to your ProProfs site, for example, [site.helpdocsonline.com](http://site.helpdocsonline.com). If you have a [custom domain](#) set up, you would*

*use that URL.*

 [Download a sample HTML file](#)

*That is all about the search feature in the ProProfs Knowledge Base.*

### Related Articles:

- [Tabs](#)
- [Keyword Index](#)
- [Retrieve Forgotten or Lost Passwords](#)

# Keyword Index

In addition to the table of contents, you can also create a keyword index. An index is a list of keywords or phrases that link to a page. Think of this as similar to a book index. This can help readers find the information they are looking for.

You can include the page in the keyword index and specify an index name when adding new pages. The index will list the keywords in alphabetical order (ABC). You can also hide the entire keyword index tab.

## Benefits of creating a keyword index:

- Ease of use and navigation through the help center for users
- Save user's time and effort in finding the correct information

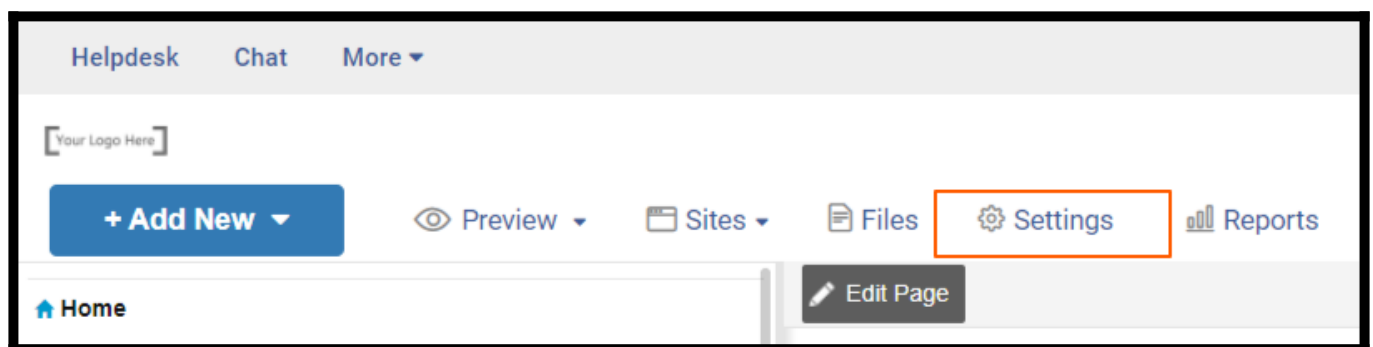
## In this article, you will learn how to:

- [Enable the Keyword Index](#)
- [View the Keyword Index](#)
- [Add a Page to the Keyword Index](#)
- [Hide a Page from the Keyword Index](#)
- [Rename a Keyword](#)
- [Filter](#)

## Enable the Keyword Index

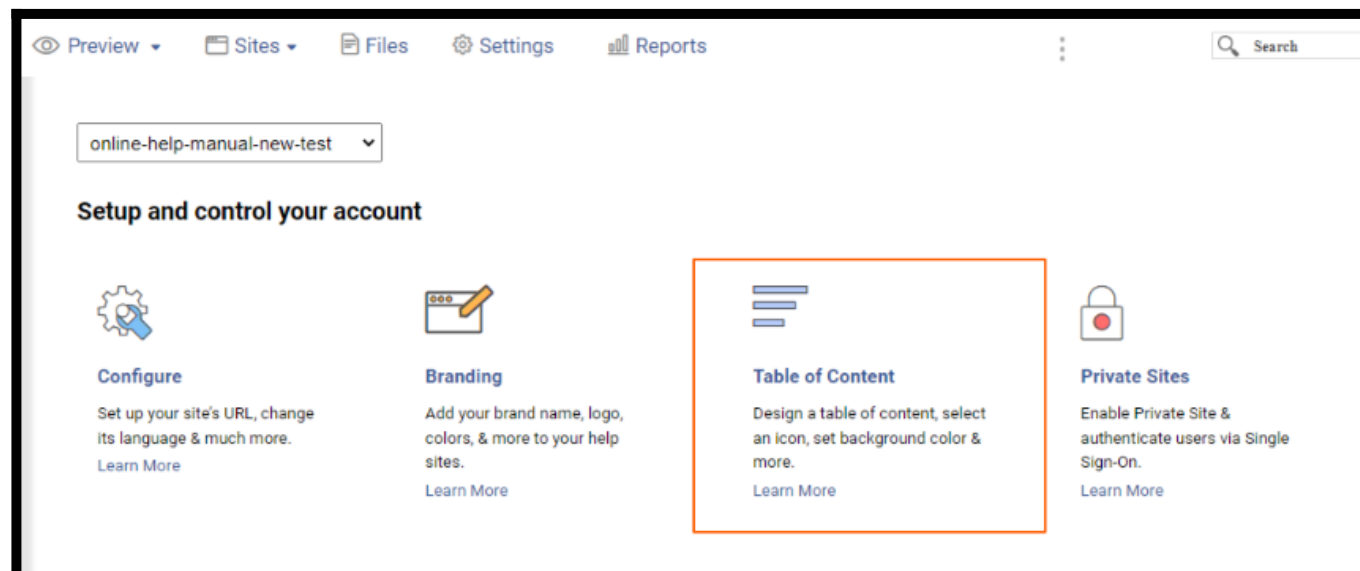
By default, the keyword index is turned off. To enable the keyword index,

- Go to **Settings** in the navbar.

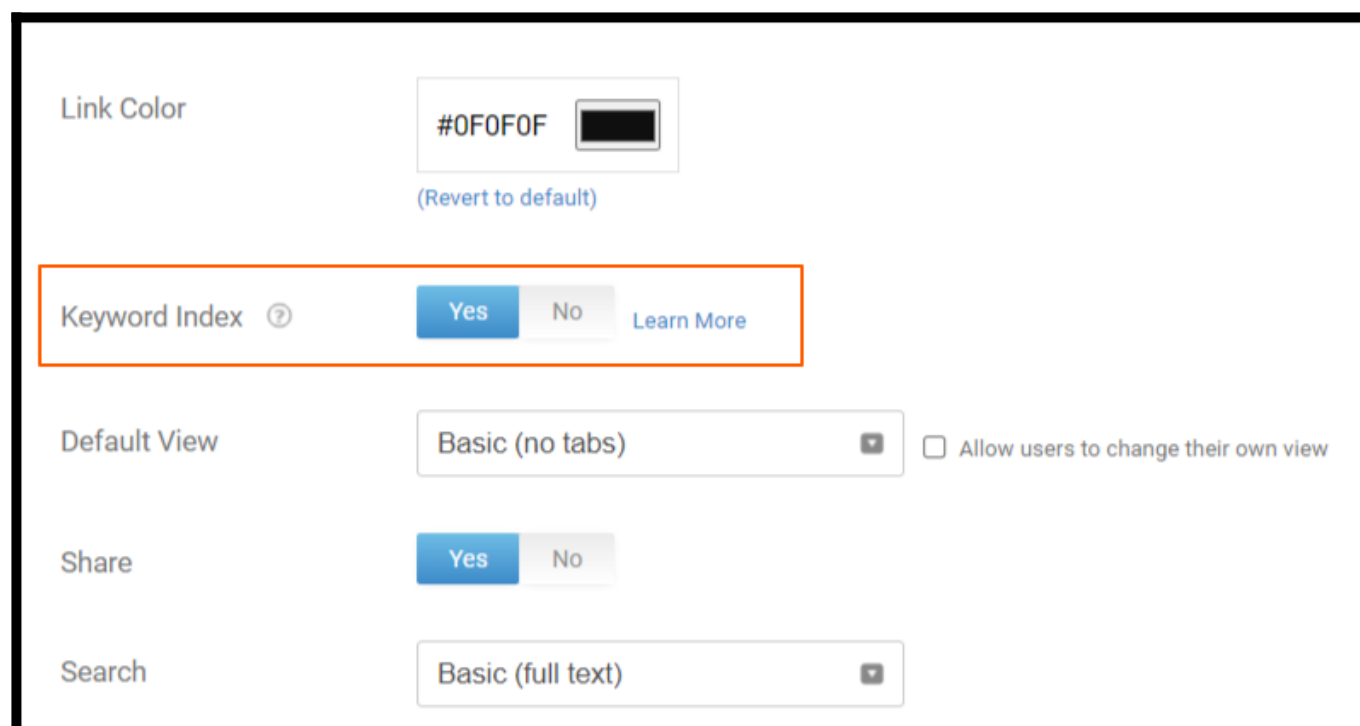




- Click **"Table of Content."**



- Scroll down to the **Keyword index** option and select **Yes**.

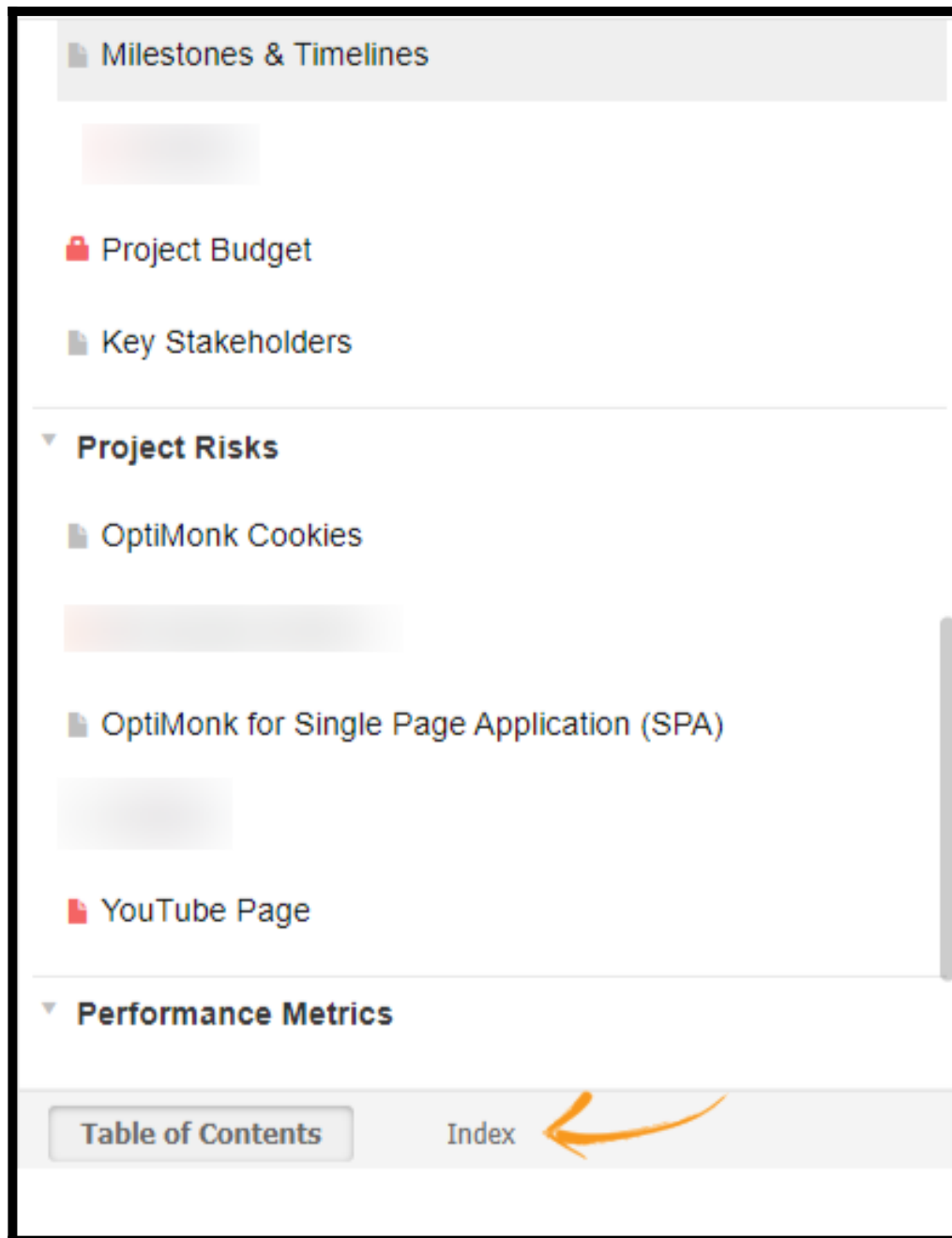


- Click **Save**.

**NOTE!** Your user role will determine whether or not you have access to the Settings section.

## How to View the Keyword Index

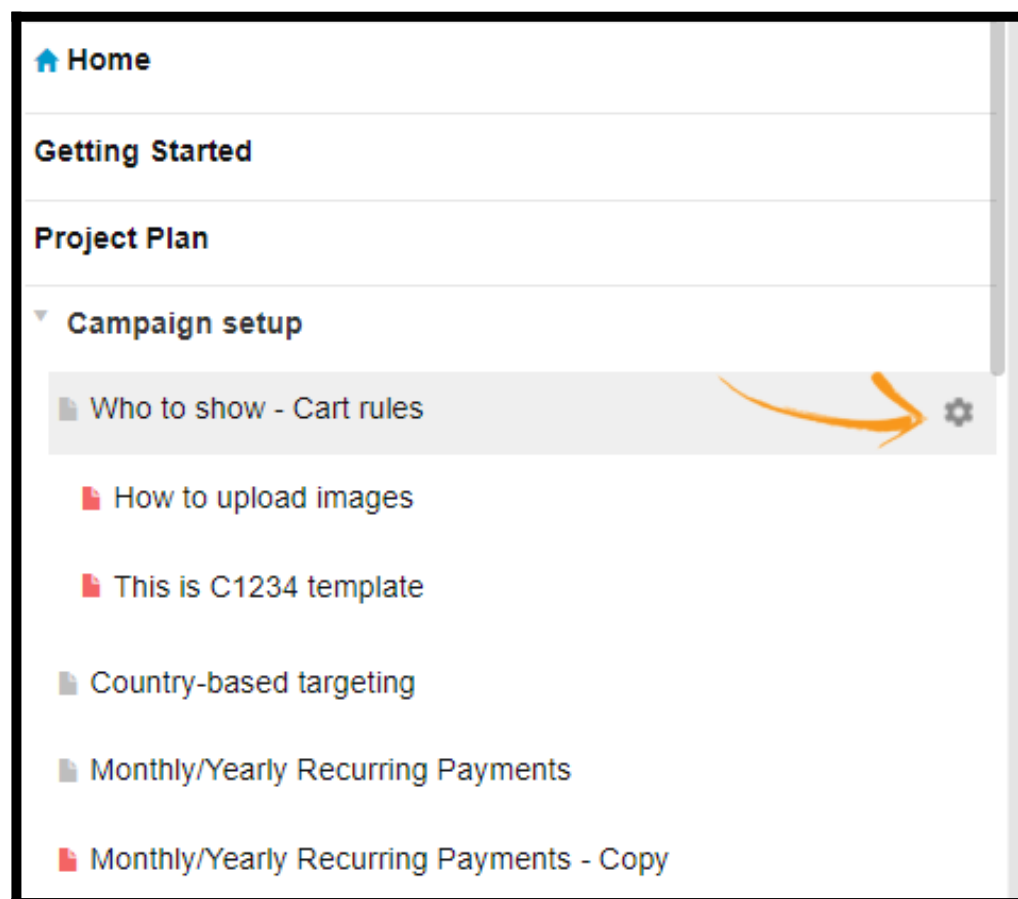
- In the left sidebar, click **"Index."**



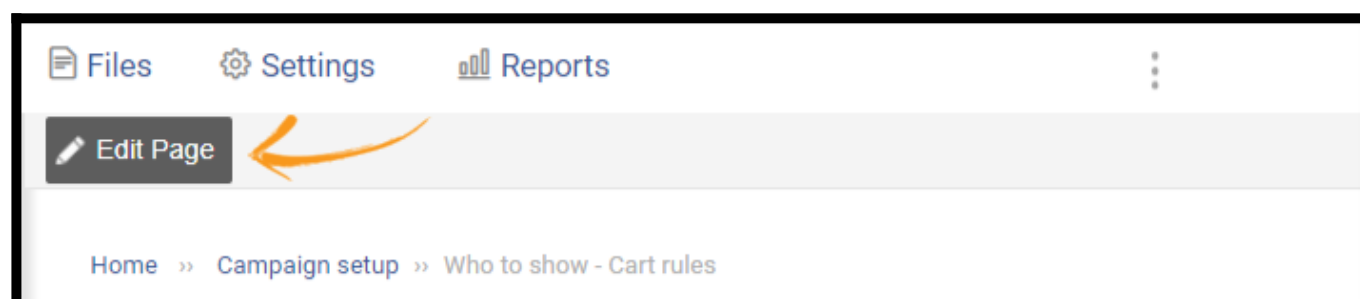
This will display the index of keywords. To view a page, click on a keyword, and that page will open.

## How to Add a Page to the Keyword Index

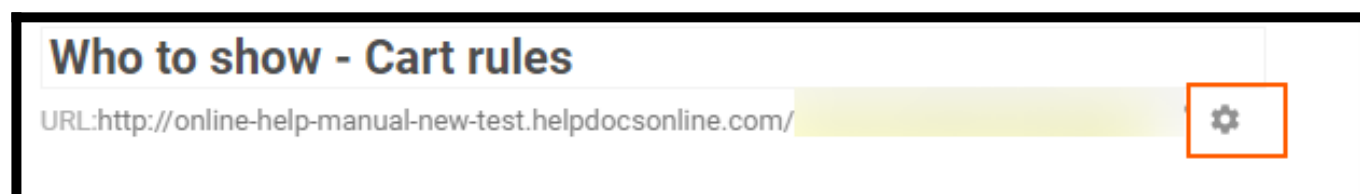
- Navigate to the **page** in the TOC that you wish to add to the keyword index.



- Click “Edit Page.”



- Click on the **Settings** icon.



- In the screen overlay, switch to the **Advanced** tab.
- Select the **checkbox** in front of “Show page in index.”
- Type in a **keyword or phrase** in the input field.

- Use a **comma** to indent and group. For example, "Passwords, How to reset" would group under "Passwords."

You can also enter multiple keyword entries. Each row you add will be a new entry in the index. For example, the two rows "Passwords, How to reset" and "My Account, Manage password" would create two separate keyword entries linking to the same page.

- Click on the **Save** button.

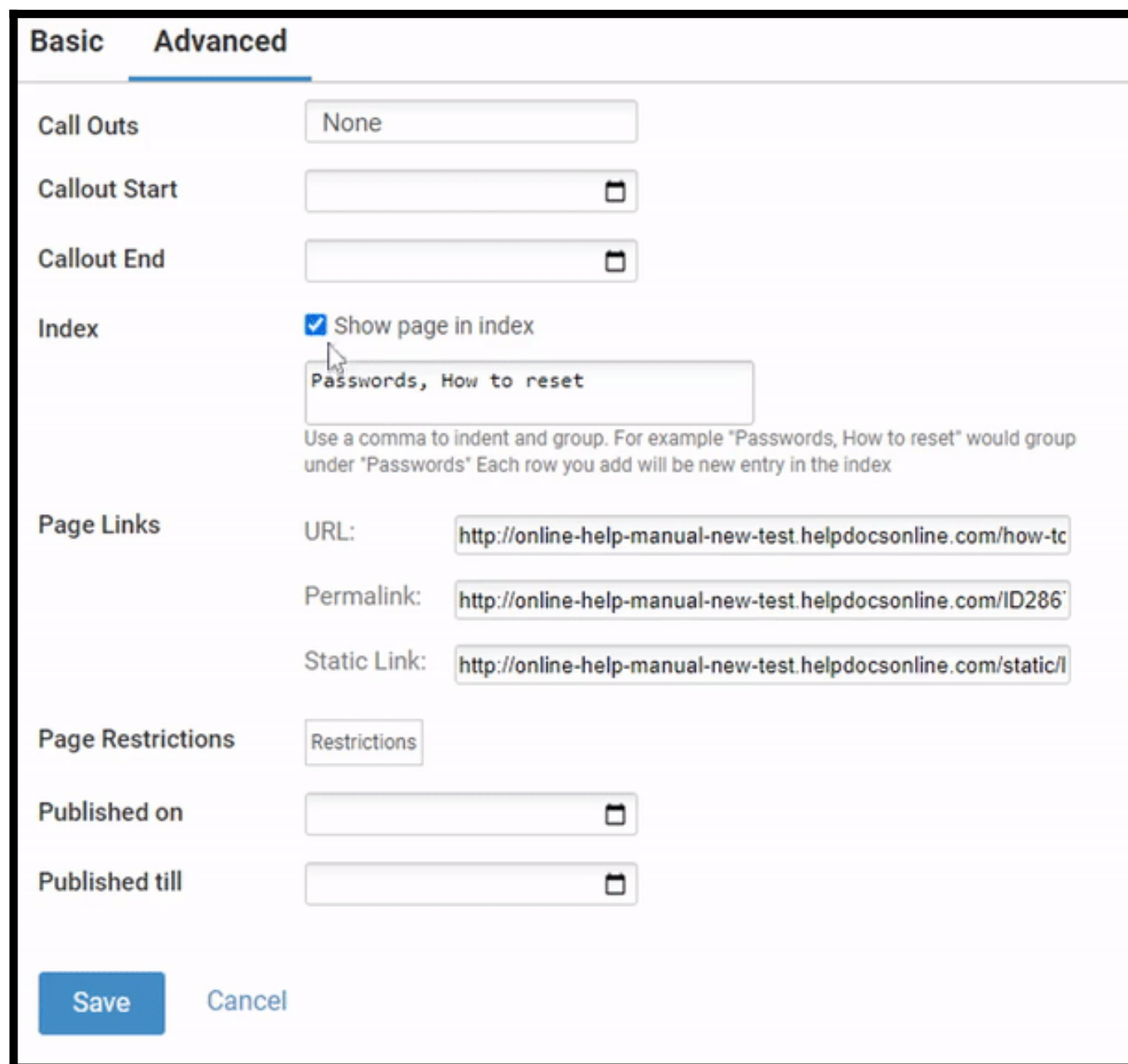
The screenshot shows the 'Advanced' tab of the ProProfs Knowledgebase settings. It includes fields for 'Call Outs', 'Callout Start', 'Callout End', 'Index' (with a checked 'Show page in index' option and a text input 'Passwords, How to reset'), 'Page Links' (with URL, Permalink, and Static Link fields), 'Page Restrictions', 'Published on', and 'Published till'. A 'Save' button is at the bottom left. Numbered callouts are: 1. 'Advanced' tab, 2. 'Show page in index' checkbox, 3. 'Passwords, How to reset' text input, 4. 'Save' button.

Basic	<b>Advanced</b>
Call Outs	None
Callout Start	
Callout End	
Index	<input checked="" type="checkbox"/> Show page in index Passwords, How to reset
Page Links	URL: <input type="text" value="http://online-help-manual-new-test.helpdocsonline.com/how-tc"/> Permalink: <input type="text" value="http://online-help-manual-new-test.helpdocsonline.com/ID286"/> Static Link: <input type="text" value="http://online-help-manual-new-test.helpdocsonline.com/static/I"/>
Page Restrictions	Restrictions
Published on	
Published till	
<b>Save</b>	

**NOTE!** Make sure to **enable** the Keyword Index feature.

## How to Hide a Page from the Keyword Index

- Go to the **page settings**.
- Switch to the **Advanced** tab in the screen overlay.
- Uncheck the **“Show page in index”** option.
- **Save** the settings.



The screenshot shows the 'Advanced' tab of the page settings overlay. The 'Index' section has the 'Show page in index' checkbox checked. Below it, a text input field contains 'Passwords, How to reset'. A tooltip explains: 'Use a comma to indent and group. For example "Passwords, How to reset" would group under "Passwords" Each row you add will be new entry in the index'. The 'Page Links' section shows three fields: 'URL:' with 'http://online-help-manual-new-test.helpdocsonline.com/how-tc', 'Permalink:' with 'http://online-help-manual-new-test.helpdocsonline.com/ID286', and 'Static Link:' with 'http://online-help-manual-new-test.helpdocsonline.com/static/'. The 'Page Restrictions' section has a 'Restrictions' field. The 'Published on' and 'Published till' fields are empty. At the bottom are 'Save' and 'Cancel' buttons.

**Basic** **Advanced**

Call Outs: None

Callout Start: [Calendar icon]

Callout End: [Calendar icon]

Index: ☒ Show page in index  
Passwords, How to reset  
Use a comma to indent and group. For example "Passwords, How to reset" would group under "Passwords" Each row you add will be new entry in the index

Page Links: URL: http://online-help-manual-new-test.helpdocsonline.com/how-tc  
Permalink: http://online-help-manual-new-test.helpdocsonline.com/ID286  
Static Link: http://online-help-manual-new-test.helpdocsonline.com/static/

Page Restrictions: Restrictions

Published on: [Calendar icon]

Published till: [Calendar icon]

**Save** Cancel

The page will no longer appear under those keywords in the index.

## How to Rename a Keyword

- Go to the **page settings**.

- Switch to the **Advanced** tab in the screen overlay.
- **Replace** the keywords.
- Click **Save**.

**Basic** **Advanced**

Call Outs

None

Callout Start

Callout End

Index

☒ Show page in index

Passwords, how to reset

Use a comma to indent and group. For example "Passwords, How to reset" would group under "Passwords" Each row you add will be new entry in the index

Page Links

URL: <http://online-help-manual-new-test.helpdocsonline.com/how-tc>

Permalink: <http://online-help-manual-new-test.helpdocsonline.com/ID286>

Static Link: <http://online-help-manual-new-test.helpdocsonline.com/static/I>

Page Restrictions

Restrictions

Published on

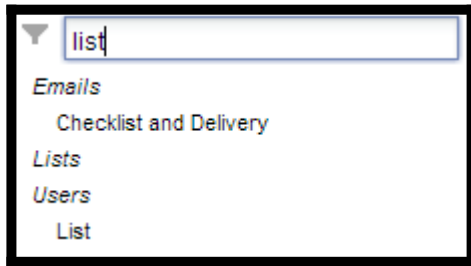
Published till

Save

Cancel

## How to Filter

The filter will search the index by keyword. It will explore the entire index and only show the results that match.



To filter the index, type your search term in the input field.

- The index will immediately search and display the results.
- Delete the search term out of the box to revert to the standard view.

*That is all about the keyword index.*

### Related Articles:

- [Retrieve Forgotten or Lost Passwords](#)
- [Tabs](#)
- [Search](#)

# How to Customize the Tab Options

ProProfs Knowledge Base allows you to open your help page(s) in separate tabs by keeping the page view as **Tabs**, making it easier for the users to navigate between the pages opened in multiple tabs.

**Tab options help you:**

- Jump to a specific page opened in the multiple tabs instantly.
- Display your Knowledge Base content into sections for a better understanding.

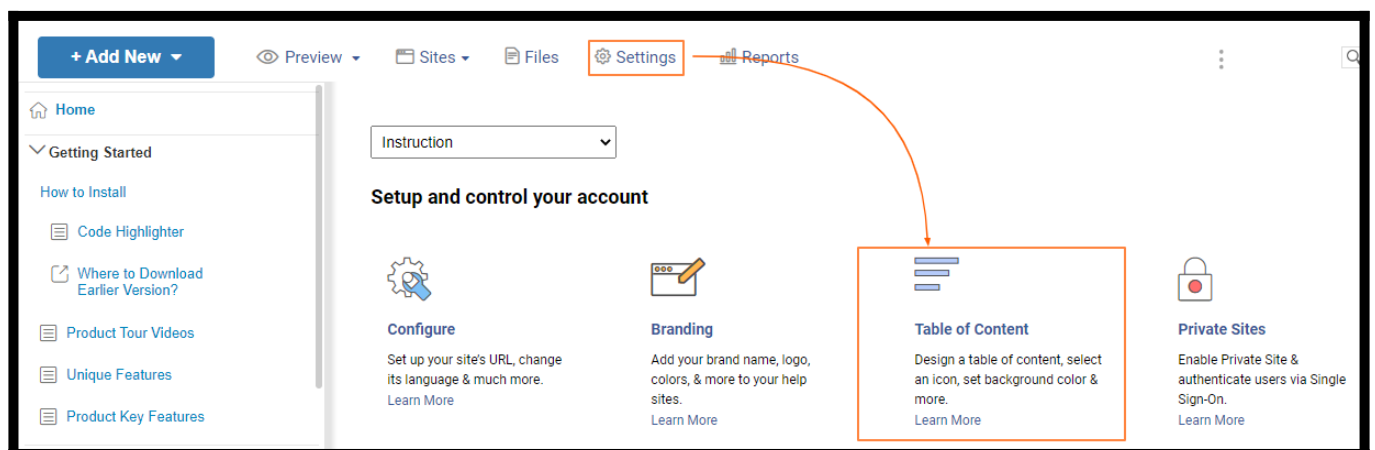
**In this article, you will learn:**

1. [How to Enable Tab View](#)
2. [How to Open & Close a Tab](#)
3. [How to Manage Tabs Using Tab Control](#)
4. [How to Use Tab Scrolling](#)
5. [How to Revert to Basic View](#)

---

## How to Enable Tab View

**Step 1:** In your ProProfs Knowledge Base editor, go to **Settings** and select “**Table of Content**”



**Step 2:** Navigate to “**Default View,**” select “**Tabs (each page opens in tab),**” and click **Save**



**Table of Content** ← back to settings

Design a table of content, select an icon, set background color & more. [Learn More](#)

Show Table of Contents ? **Yes** No

Page Table of Contents ? Yes **No**

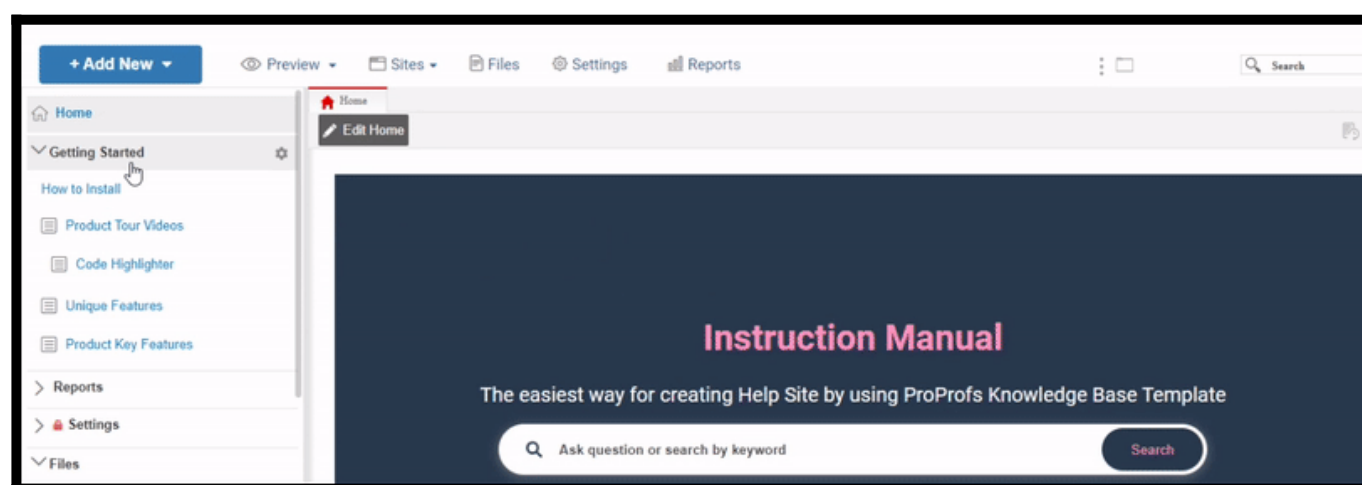
Style Modern ▼

☒ Hide empty folders logged out

Choose Icons Notes ▼

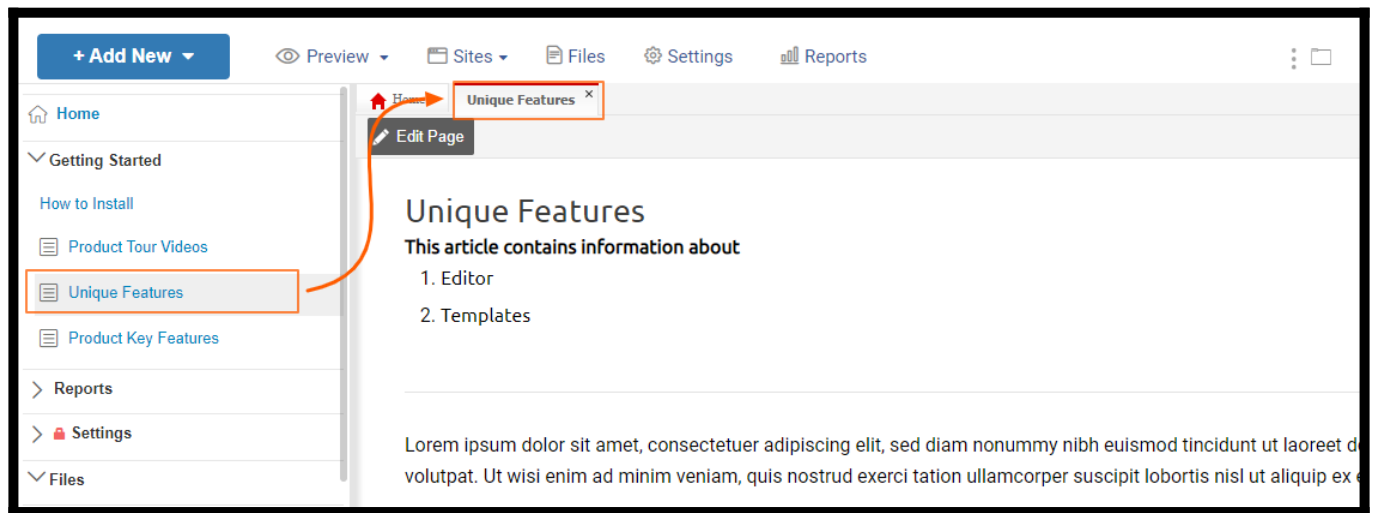
*This is an example of how*

All the pages will now open in a new tab.

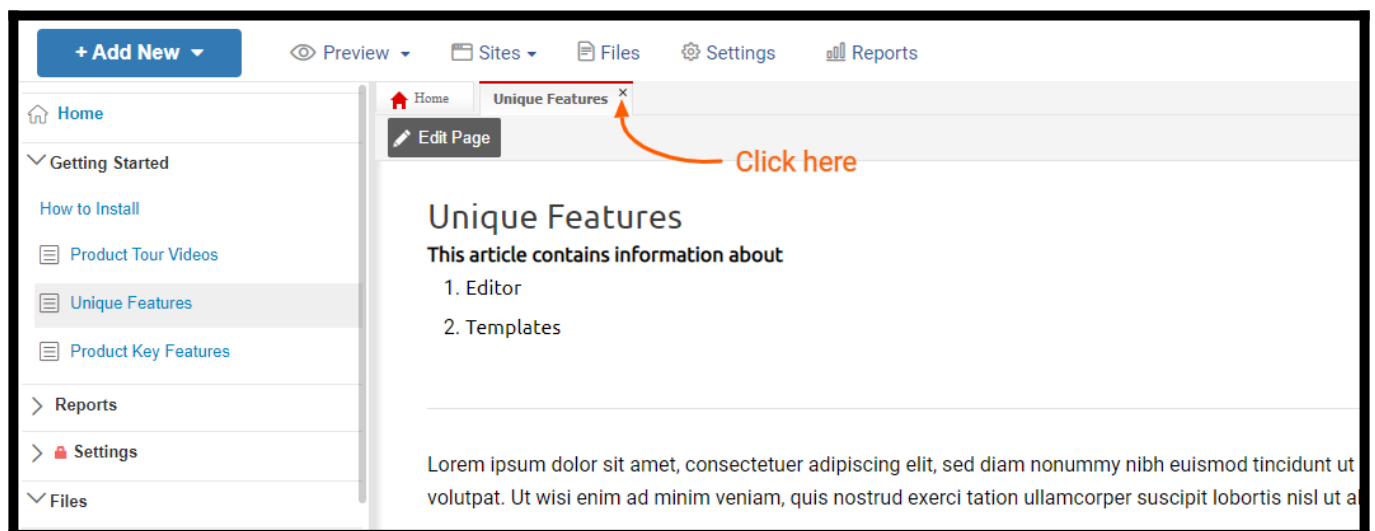


## How to Open & Close a Tab

- To **check the tab view**, open a page from the Table of Content, which will open in a Tab view



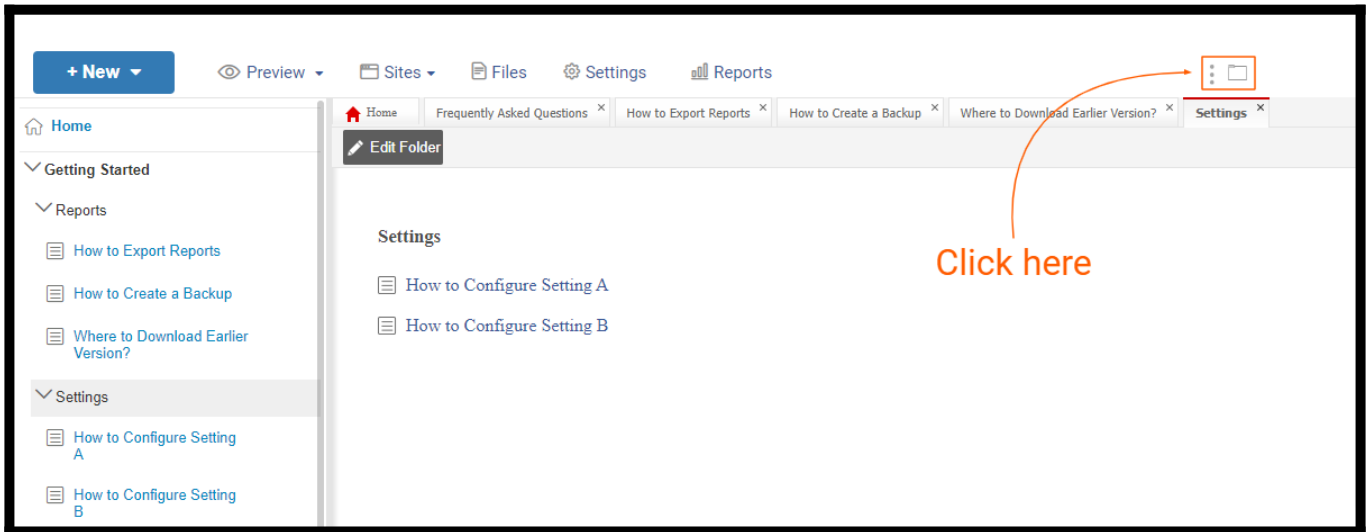
- To **close a tab**, click the close button on the top right corner of the tab



## Tab Control

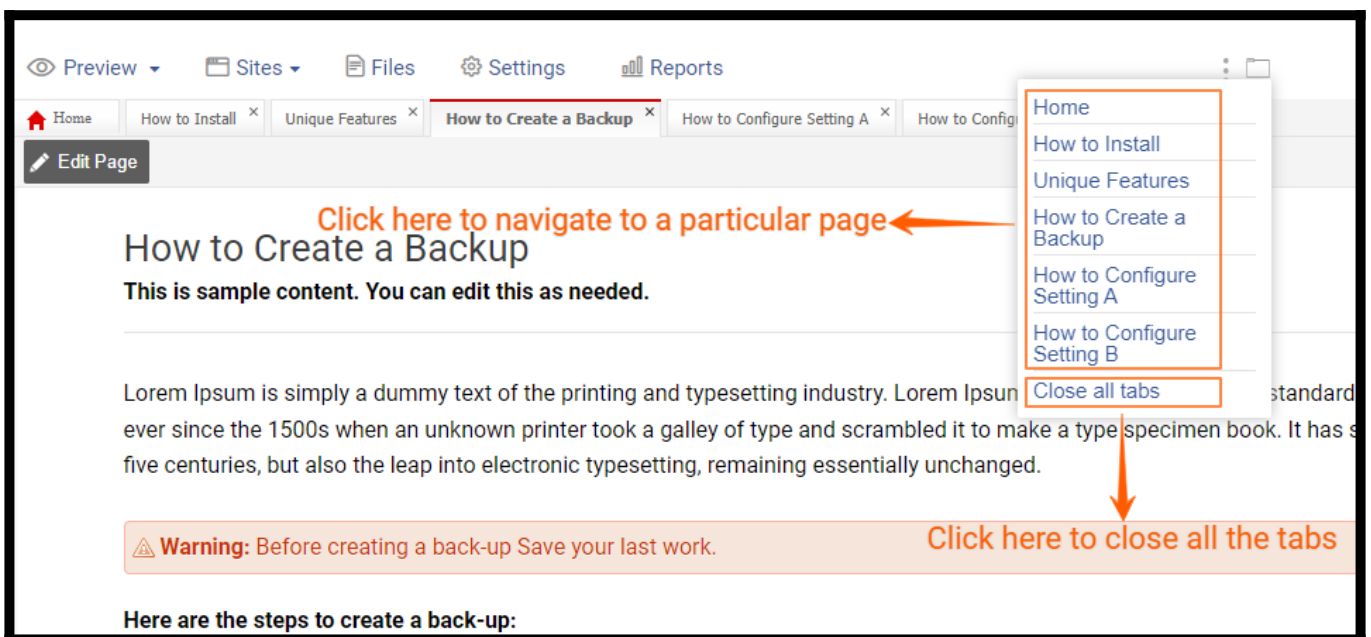
The Tab control lets you view and navigate to a specific tab and close all the opened tabs simultaneously.

**Step 1:** In the ProProfs Knowledge Base editor, click the folder icon shown in the image below



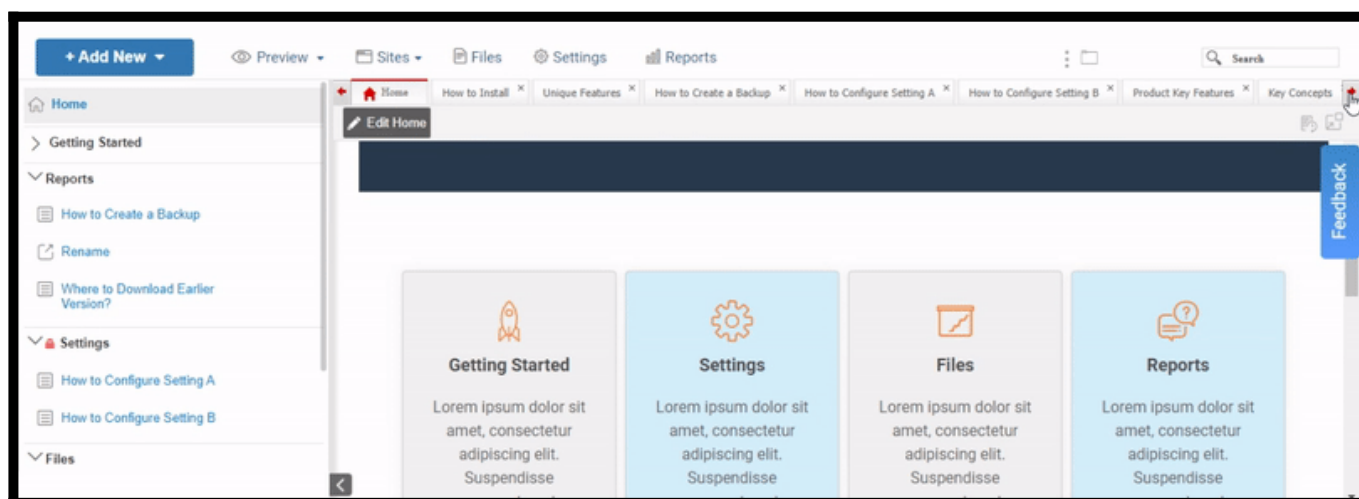
**Step 2:** The **Tab Control** menu will open. From here, you can:

- Navigate to the chosen tab
- Close all the tabs



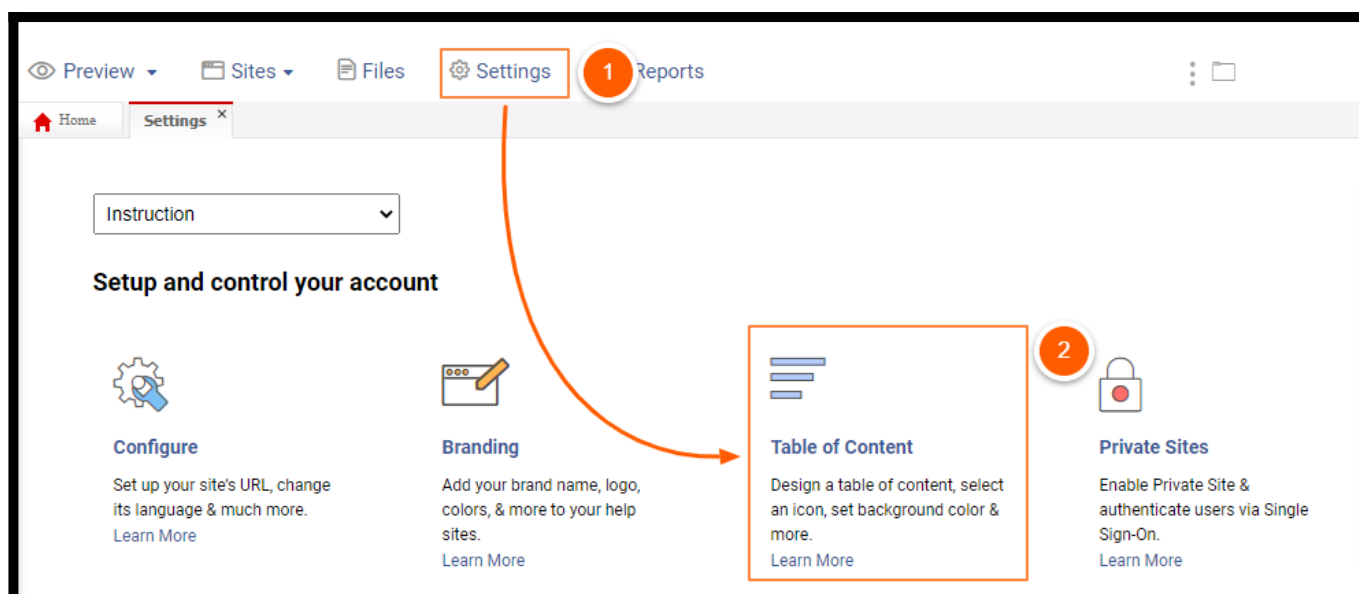
## Tab Scrolling

- Click  to scroll between the opened tabs

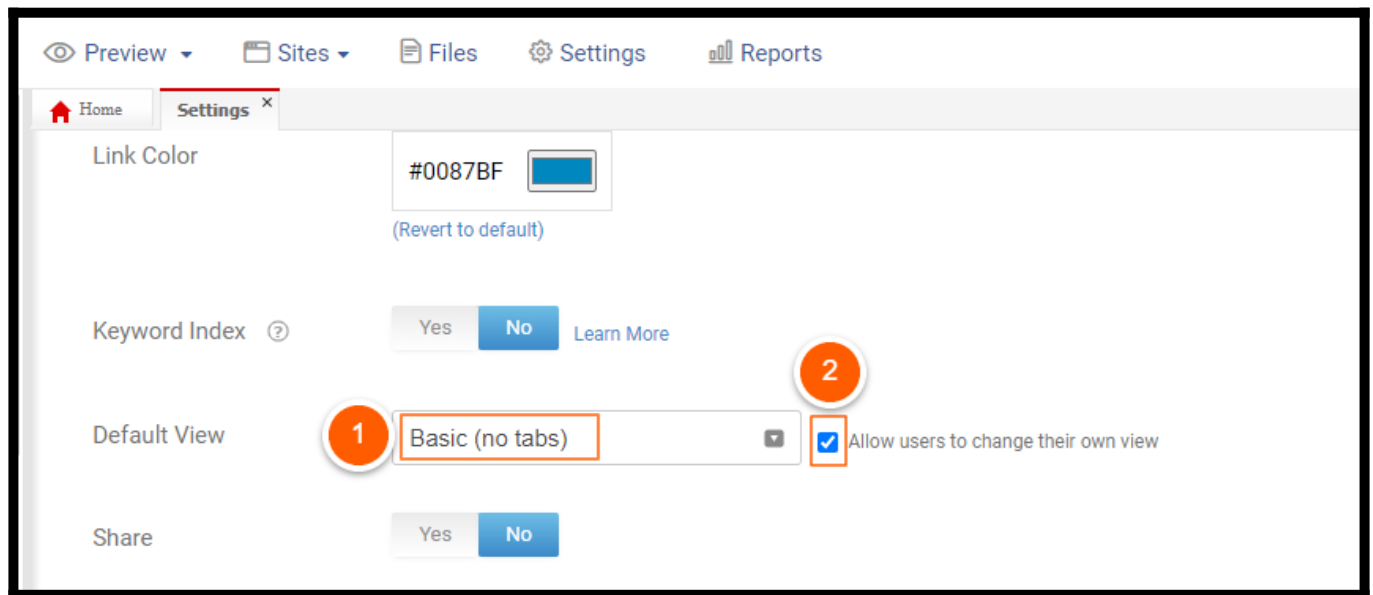


## Revert to Basic View

**Step 1:** In the ProProfs Knowledge Base Editor, go to **Settings > Table of Content**



**Step 2:** In the **Default view**, select **“Basic (No tabs)”** and check **“Allow users to change their own view”**



**Step 3:** Click **Save** and preview the changes

Your user role will determine whether or not you have access to the Settings section.

*That is all about customizing the Tabs options in the ProProfs Knowledge base.*

## Related Articles

- [Password Reset](#)
- [Tabs](#)
- [Keyword Index](#)

# How to Reset Your Password

If you have forgotten your existing Knowledge Base password, you can quickly reset it through the “Password Reset” feature.

***Note:** For security reasons, we cannot email your password.*

The “**Password Reset**” feature allows you to quickly access your Knowledge Base account in case you can’t remember your current login credentials.

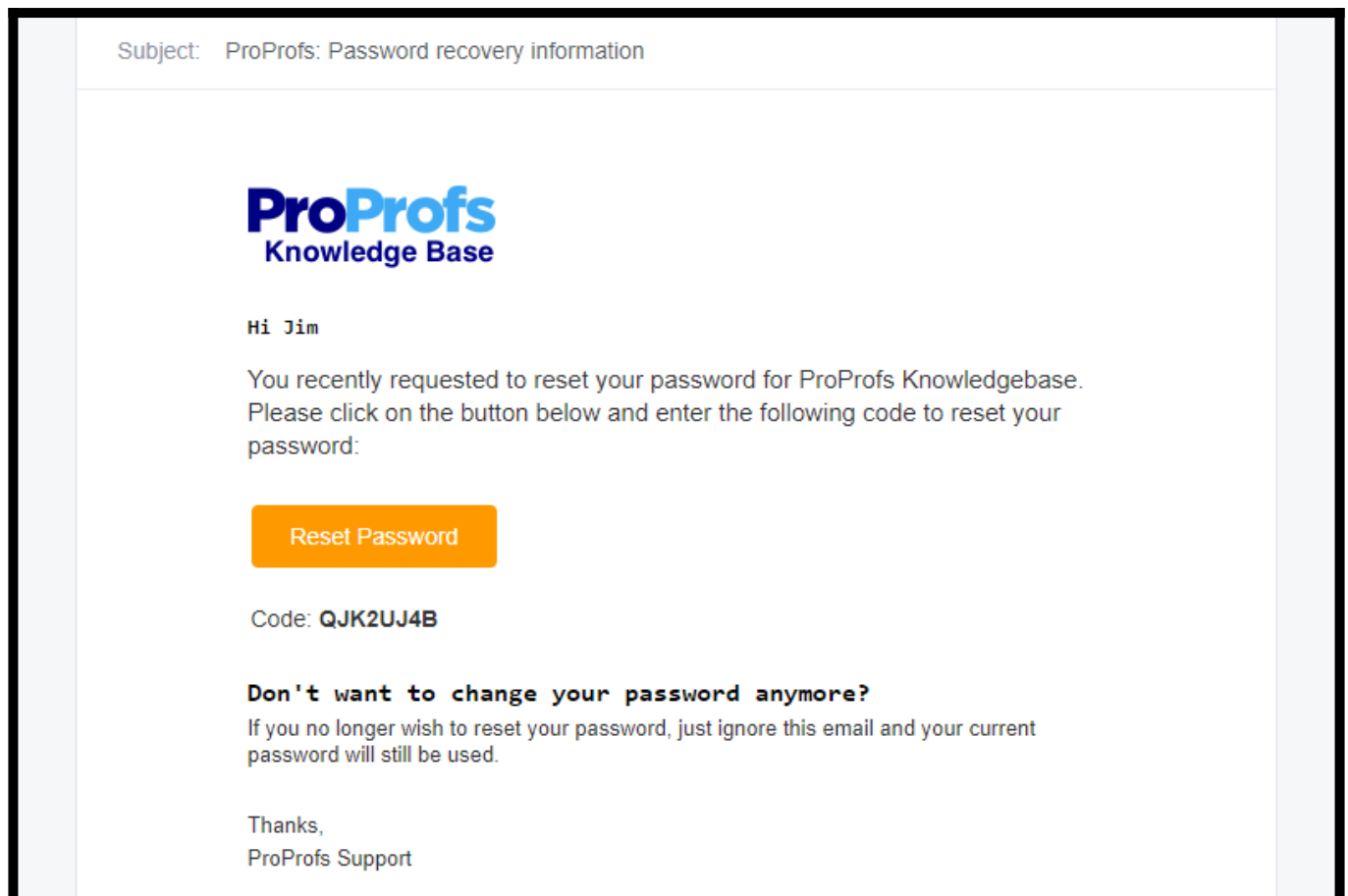
## To Reset Your Password

**Step 1:** Go to the login screen <https://www.proprofskb.com/login/>

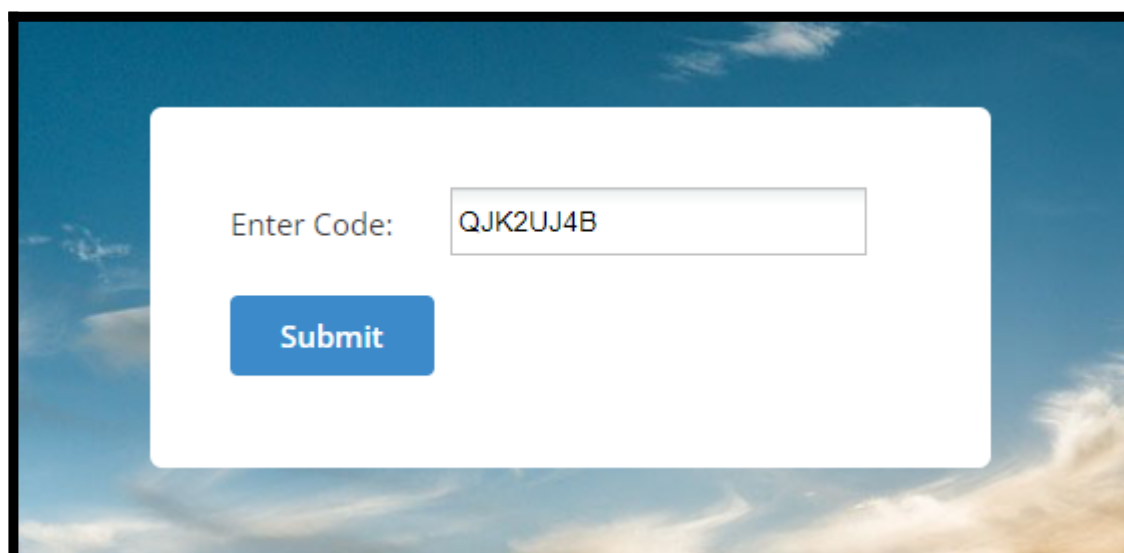
**Step 2:** Click **Forgot your password?** A new tab will open

**Step 3:** Enter your email in the space provided and click **Send**

**Step 4:** Check your email inbox. If you do not see the email from ProProfs, check your spam or junk mail folder

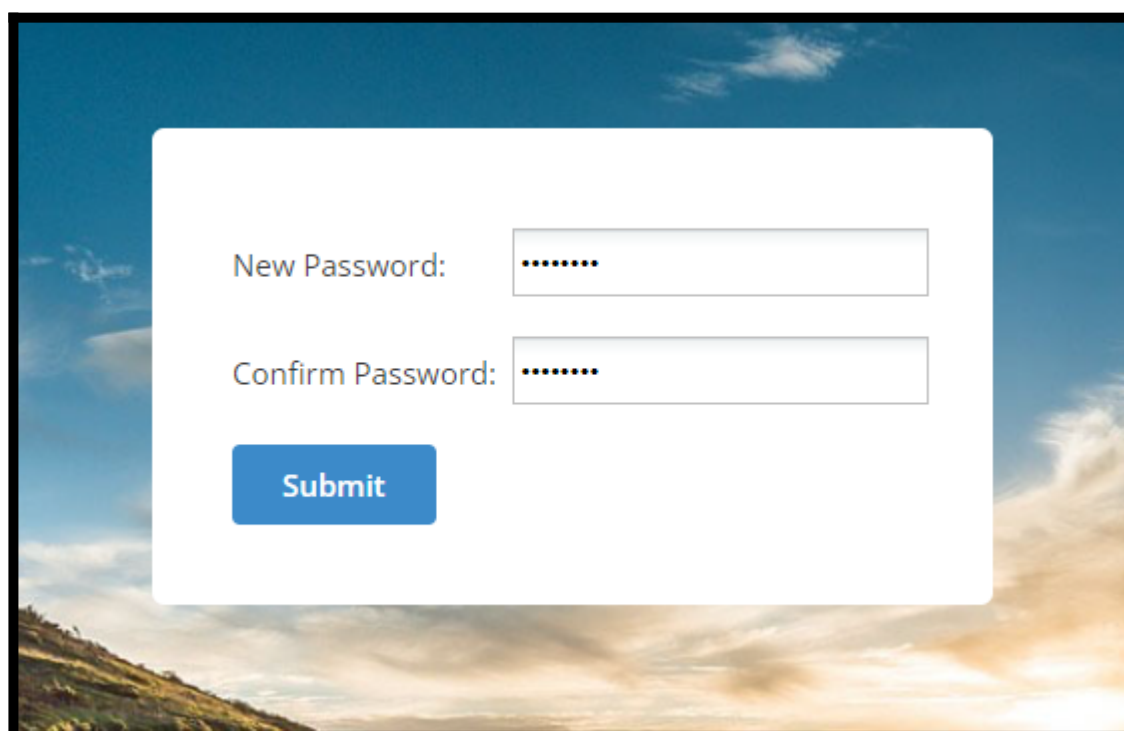


**Step 5:** Click **Reset Password**. A new tab opens. Enter the **unique code** you received in the email and click **Submit**

A screenshot of a web form for entering a verification code. The form is white and centered on a background image of a blue sky with clouds. It contains a label "Enter Code:", a text input field with the value "QJK2UJ4B", and a blue "Submit" button below it.

**Step 6:** Enter your new password and confirm it. Click **Submit**

**Note:** Password must contain at least 8 characters and include uppercase, lowercase, numeric, and special characters.

A screenshot of a web form for confirming a new password. The form is white and centered on a background image of a blue sky with clouds. It contains two labels: "New Password:" and "Confirm Password:". Each label is followed by a text input field filled with dots. Below the input fields is a blue "Submit" button.

**You will now be redirected to the login page.**

**Don't want to change your password anymore?**

*If you no longer wish to reset your password, just ignore the email, and your current password will remain relevant. The email will expire in one hour.*

*That is all about resetting your password in ProProfs Knowledge Base.*

## Related Articles

- [Search](#)
- [Tabs](#)
- [Keyword Index](#)



# Logged in vs. Logged out

In the ProProfs application, logged-in and logged-out views look almost identical. However, when a user is logged in, certain navigation controls will appear to manage the pages and the application. (See highlighted controls below.)

Logged in users are people in your company that that can log in to ProProfs to author help pages, administer the application, add tooltips and more. People who read the documentation (logged-out) are not counted as users and are considered end-users. End users are the people who are reading the documentation. They do not have login access and can only read the documentation. You can [restrict access](#) to your end-users.

The screenshot shows the ProProfs application interface for 'EMAIL MARKETING CO.'. The top navigation bar includes a 'Log in' button. The sidebar on the left lists various sections: 'Getting Started' (Home, Using the App, FAQ, Request Information, Updating Your Profile, Suggestion Form), 'Creating a...', 'Recipient List', 'Admin', 'FAQ', and 'Reporting'. The main content area features a search bar and a section titled 'Popular Help & FAQs' with links to 'Creating and Sending Emails', 'Recipient Lists', 'FAQ', and 'Admin'. A 'Support' button is located in the bottom right corner.

## Related Articles:

[Search](#)

[Tabs](#)

[Keyword Index](#)

# Basic Overview

# Pages

# How to Recover a Deleted Page

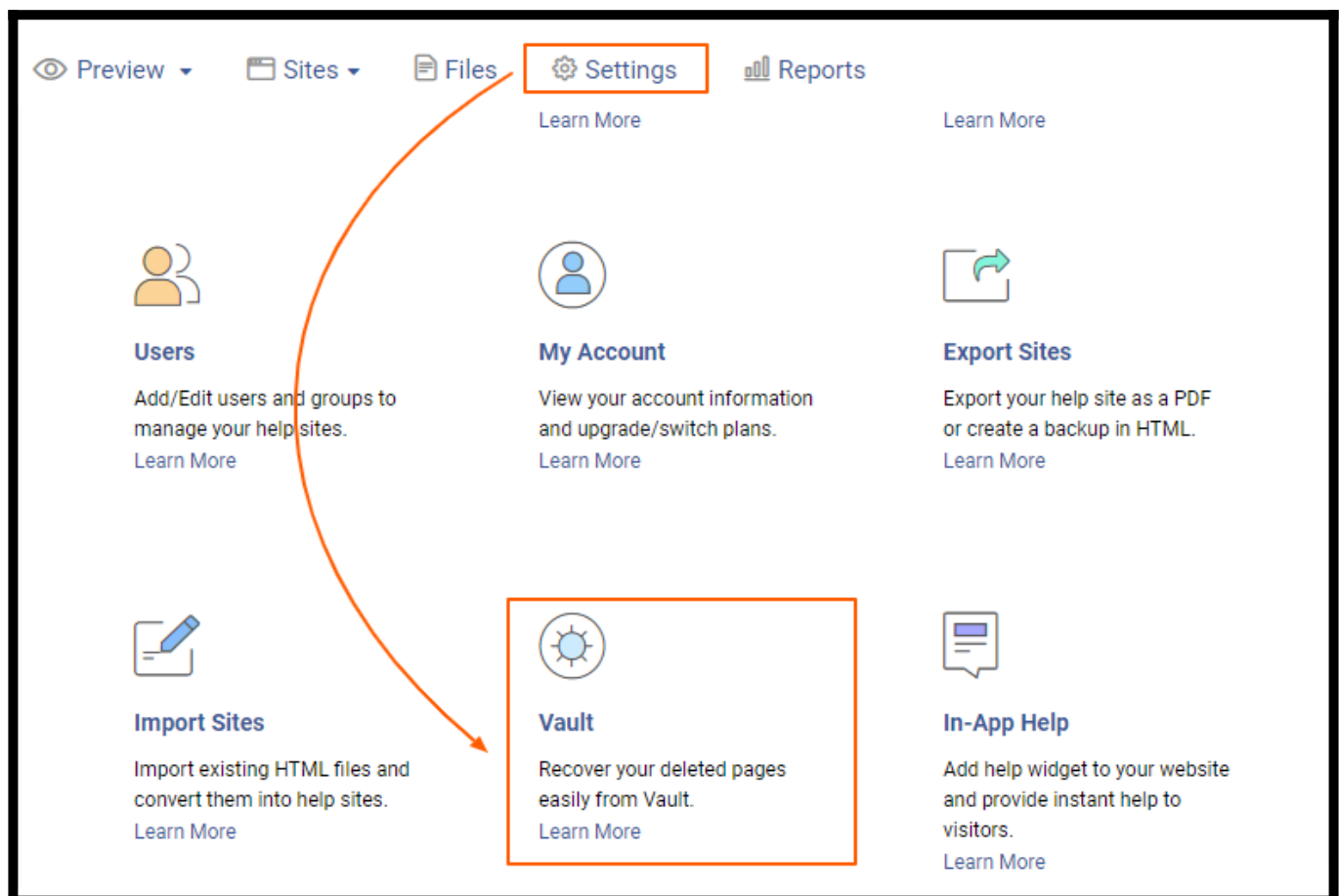
Recover deleted pages or articles in the Knowledge Base with our **Vault** feature - a recycle bin that stores the pages you have dumped.

## Benefits of the Vault:

- Never lose an accidentally deleted page or article
- Vault stores a deleted page forever so you can restore it anytime

## How to Recover a Deleted Page

**Step 1:** In your ProProfs Knowledge base dashboard, go to **Settings > Vault**.



**Step 2:** Select the page and click **"Restore."**

The screenshot shows the 'Vault' section of the ProProfs Knowledge Base interface. At the top, there are navigation tabs: Preview, Sites, Files, Settings, and Reports. Below these, the 'Vault' section is titled 'Vault(8)' and includes a '← back to settings' link. A red box highlights the 'Restore' button, with a red circle and the number '2' next to it. Below the button is a table of deleted pages. The first row of the table is highlighted with a red box and a red circle with the number '1'. The table has columns: Page Title, Deleted By, Date, Status, and Last Modified By.

Page Title	Deleted By	Date	Status	Last Modified By
<input checked="" type="checkbox"/> Unique Features	Rich Parker	August, 19 2022	Unpublished Changes	Rich Parker
<input type="checkbox"/> New Page	Rich Parker	August, 19 2022	Draft	Rich Parker
<input type="checkbox"/> ABCDEFGH	Rich Parker	August, 19 2022	Draft	Rich Parker
<input type="checkbox"/> Product Pricing	Rich Parker	July, 28 2022	Draft	Rich Parker
<input type="checkbox"/> Template 102	Rich Parker	July, 15 2022	Draft	Rich Parker
<input type="checkbox"/> Template 102	Rich Parker	July, 15 2022	Draft	Rich Parker

At the bottom of the table, there is a pagination bar showing 'Page 1 of 1'.

The selected page will be restored to the respective folder/category in the **Table of Contents**.

The screenshot shows the 'Vault' section of the ProProfs Knowledge Base interface. On the left, there is a sidebar with a 'Home' link and a 'Getting Started' section. The 'Getting Started' section includes links to 'How to Install', 'Code Highlighter', 'Where to Download Earlier Version?', 'Product Tour Videos', 'Unique Features', and 'Product Key Features'. The 'Unique Features' link is highlighted with a red box and an orange arrow points to it. The main content area shows the 'Vault' section with a '← back to settings' link and a 'Vault(7)' title. Below the title are buttons for 'Show TOC Name', 'Restore', and 'Manage Notification'. A table of deleted pages is shown, with the 'Unique Features' page highlighted in orange and labeled 'Page restored'.

Page Title	Deleted By	Date	Status	Last Modified By
<input type="checkbox"/> Product Pricing	Rich Parker	July, 28 2022	Draft	Rich Parker
<input type="checkbox"/> New Page	Rich Parker	August, 19 2022	Draft	Rich Parker
<input type="checkbox"/> HAZARD	Rich Parker	July, 15 2022	Draft	Rich Parker
<input type="checkbox"/> Template 102	Rich Parker	July, 15 2022	Draft	Rich Parker
<input type="checkbox"/> Unique Features	Rich Parker	August, 19 2022	Draft	Rich Parker
<input type="checkbox"/> Template 102	Rich Parker	July, 15 2022	Draft	Rich Parker

That is all about recovering a deleted page in ProProfs Knowledge Base.

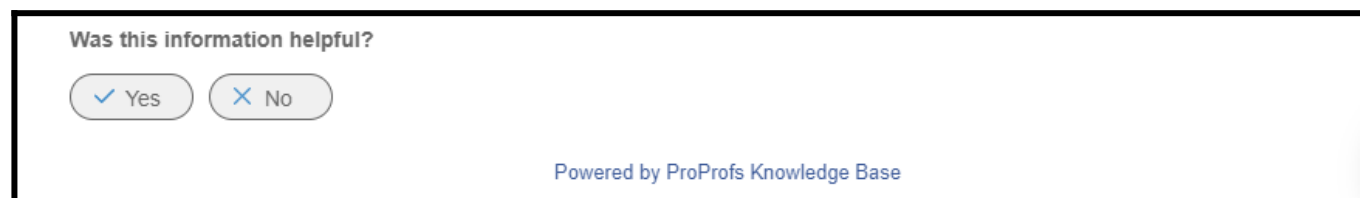
## Related Articles:

- [How to Edit or Delete a Page](#)
- [How to View the Revision History of a Page](#)
- [How to View All the Pages](#)

# How to Enable & Customize Feedback Settings

The **Feedback** feature allows your website visitors to rate whether a webpage or an article is helpful for them or not. It appears as a question at the bottom of a webpage or the end of an article, and readers can respond by clicking '**Yes**' or '**No**.'

Here's how the feedback survey appears at the bottom of a page or article:

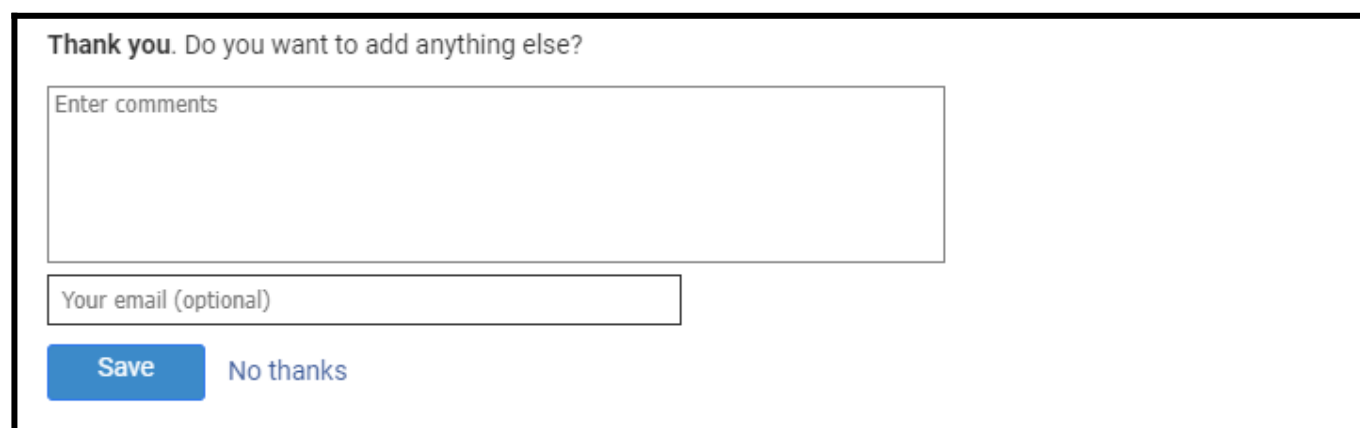


Was this information helpful?

☒ Yes ☐ No

Powered by ProProfs Knowledge Base

When your website visitors answer '**Yes**,' the following question is displayed at the end of the page. They can choose to send their feedback.



Thank you. Do you want to add anything else?

Enter comments

Your email (optional)

When the response is "**No**," your website visitors get the follow-up question which lists some selectable responses such as '**Fix typos or links**,' '**Fix incorrect or incomplete information**,' etc. They can also provide additional feedback in the comment box provided below. They can choose to send or ignore this follow-up question by clicking "**No thanks**."

**Thank you.**How can we improve this document?

☐ Fix typos or links

☐ Fix incorrect or incomplete information

☐ I have a question

☐ Add or update screenshots

☐ Article too long

Enter comments

Your email (optional)

**Save** No thanks

**Note:** When a visitor clicks **"Send"** for the follow-up questions, the feedback is sent to the email addresses you provide when customizing the feedback settings. If they click **'No thanks,'** no email is sent, but the response to the original question ("Yes" or "No") is stored in the feedback reports.

### Benefits of asking for feedback on your help content:

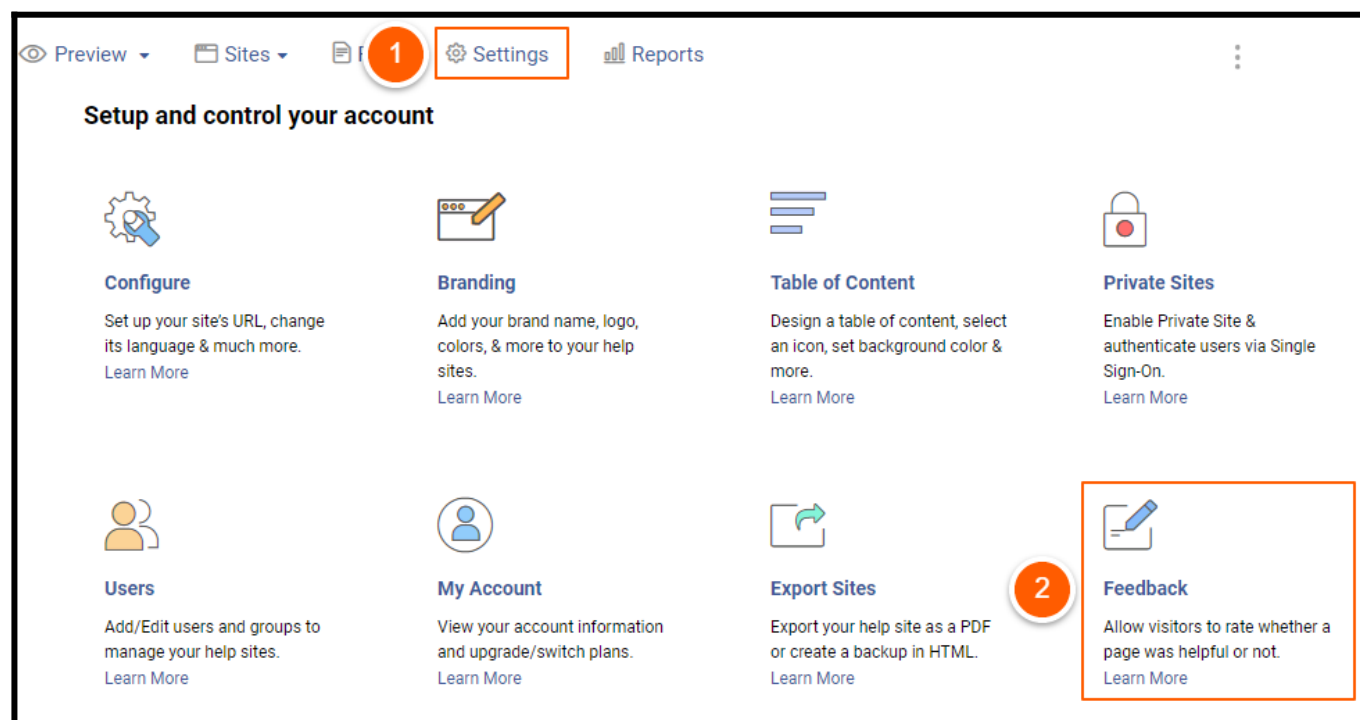
- Lets you know how your help pages or articles are performing
- It helps you measure customer satisfaction
- Detailed feedback enables you to create the best customer experience
- Shows your audience that you value their opinion

### In this article, you'll learn:

1. [How to Enable and Customize Feedback Settings](#)
2. [How to Access Feedback Reports](#)

## 1. How to Enable and Customize Feedback Settings

**Step 1:** In your ProProfs Knowledge Base dashboard, go to **Settings > Feedback**.



## Step 2: In your Feedback Notifications screen

- Select **“Turn On Feedback.”**

Here you can select feedback style as **“One step feedback”** or **“Two Step feedback.”**

When you select **“One Step feedback,”**

- Enter the email address for feedback notification.
- Enter the **“Question Title.”**
- Select **“Require email”** option.
- Click **Save**.



**Feedback Notifications** ← [back to settings](#)

We can email you every time an end user sends feedback [Learn more](#).

☒ **Turn On Feedback**

**Choose Style** One Step Feedback ▼ **1**

**\* Email Addresses** @gmail.com **2**  
Separate each email with a comma (john@email.com, jane@email.com)

**Question Title** Switch to Default **3**

**Require email** ☐ Require end user's email before submitting feedback **4**  
☐ Do not allow end-user to submit feedback more than once per page

**Save**

**NOTE:** You can click Switch to Default to reset the original question.

Here is how the **“One step Feedback”** form will appear on your page

**Step 4:** Lorem Ipsum has been the industry's standard dummy text ever since the 1500s when an unknown printer took a galley of type and scrambled it to make a type specimen book.

**Step 5:** It was popularized in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

---

Was this information helpful?

Enter comments

Your email (optional)

**Send** No thanks

When you select **“Two Step feedback,”**

- Enter the Email address for feedback notification.
- Enter the **“Question Title”** and **“Follow Up a question.”**
- Select the **“Require email”** option.
- Click **Save**.

**Feedback Notifications** ← back to settings

We can email you every time an end user sends feedback [Learn more.](#)

☒ Turn On Feedback

Choose Style

\* Email Addresses   
Separate each email with a comma (john@email.com, jane@email.com)

Question Title   
[Switch to Default](#)

Follow up question   
[Switch to Default](#)

Require email ☒ Require end user's email before submitting feedback  
☒ Do not allow end-user to submit feedback more than once per page

Here is how the “Two Step Feedback” form will appear on your page

**Was this information helpful?**

**Step 1**

---

**Thank you . How can we improve this document**

☐ Fix typos or links

☐ Fix incorrect or incomplete information

☐ I have a question

☐ Add or update screenshots

☐ Article too long

Enter comments

Your email (required)

**Step 2**

### Description of Feedback Form elements

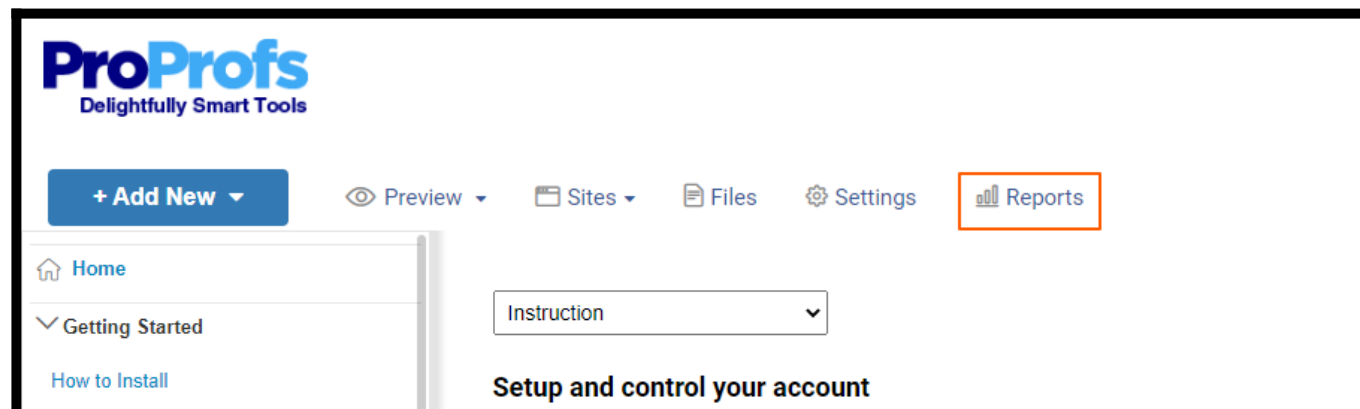
- 1. One-Step Feedback:** This allows visitors to type their feedback and send it over.
- 2. Two-step feedback:** This allows visitors to rate the help article on the helpful quotient between Yes or No. Once they do, the next step will be to check the boxes next to the improvements they wish to see. In addition, they can provide some additional comments and send over feedback.
- 3. Email Addresses:** Enter single or multiple email addresses on which you want to receive feedback.
- 4. Question Title:** Customize the question title as per your preferences.
- 5. Follow-Up Question:** Enter the follow-up question for detailed feedback if the response is 'No' to the first question.
- 6. Require email:**
  - Require end user's email before submitting feedback: Check the box if you wish to collect the user's email address when submitting feedback.
  - Do not allow end users to submit feedback more than once per page: Prevent your website visitors from giving feedback more than once per page visit.

For example, if visitors submit their feedback, they cannot do it again for the same page unless the page is refreshed or they return.

## 2. How to Access Feedback Report

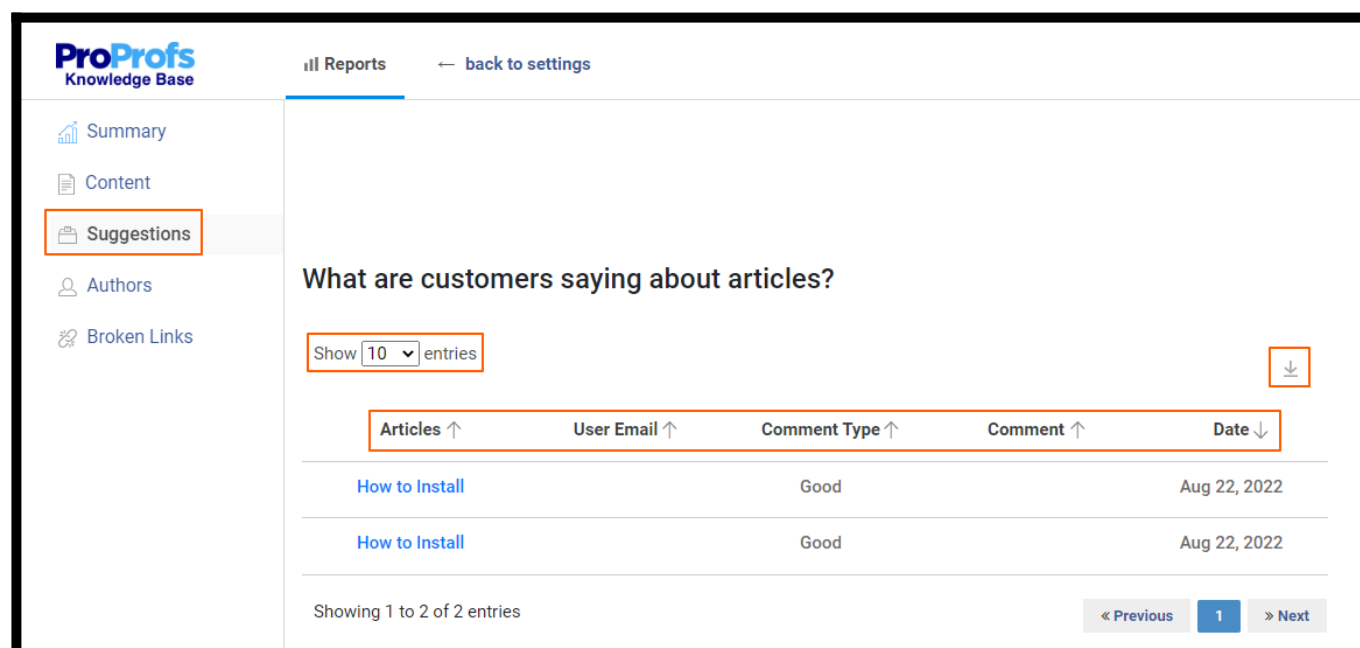
Feedback generates a corresponding report showing your website visitors' ratings of your web pages or articles.

**Step 1:** In your ProProfs Knowledge Base dashboard, go to **Reports**.



**Step 2:** Select Suggestions from the sidebar and navigate to “What are customers saying about articles?”

Here is what the report will look like:



From here, you can:

- Select the **no. of entries** to be displayed on a single page.
- See and access the **article**.
- Access the email addresses of your website users.
- View feedback. “**Good**” means your website visitors clicked “**Yes**,” while “**Bad**” means they clicked “**No**.”

- **View the comments** given by the users.
- **View the date** on which the user gave feedback.
- **Download** the feedback report.

*That is all about feedback and ratings in the ProProfs Knowledge Base.*

#### Related Articles:

- [How to View All Pages](#)
- [How to Recover a Deleted Page](#)
- [How to Integrate ProProfs Survey Maker Form with Knowledge Base](#)

# Editing Content

# File & Image Manager

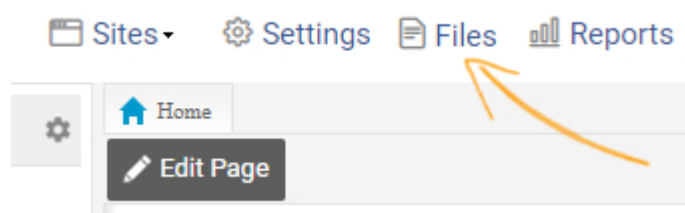
The file manager is a central location for the files you have uploaded. You can browse, upload, and manage files here.

- [File Manager](#)
  - [Uploading Files](#)
  - [Upload Error Messages](#)
  - [Insert File into Page](#)
  - [Insert Image into Page](#)
  - [Delete, Rename, and Move Images or Files](#)
- 

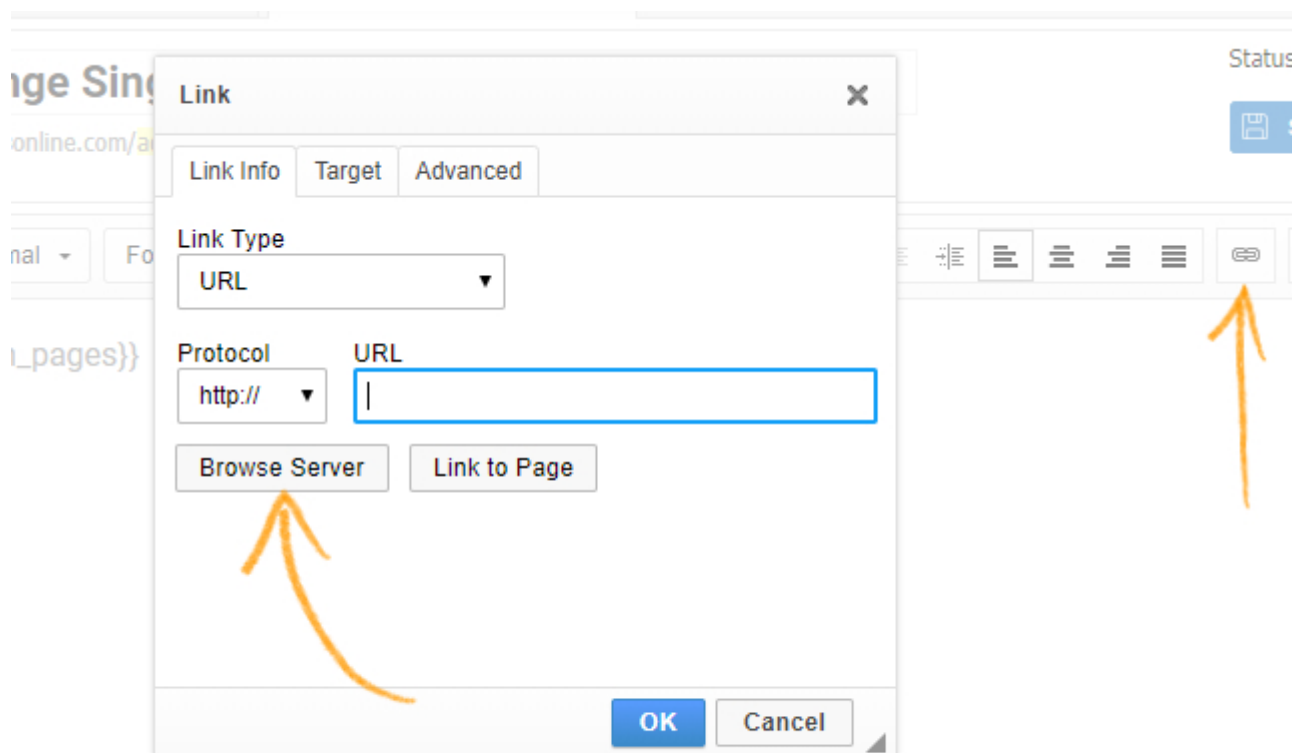
## File Manager

You can open the file manager in two ways:

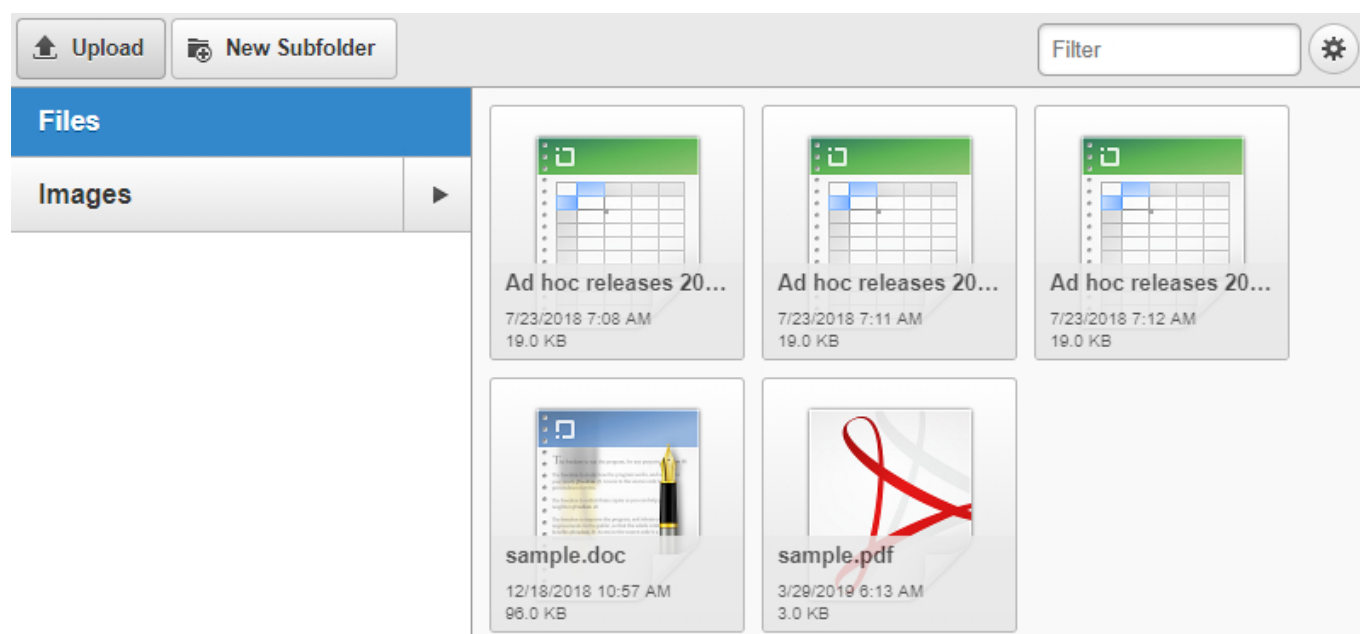
1. Click on **Files** in the toolbar.



2. When adding or editing a page, click on the link button in the toolbar. Then click **Browse Server** in the links overlay.



The screenshot below shows the manager and explains each section.



**Folder's Pane** – The section on the left is known as the folder's pane. This contains the tree view of the folders that you can navigate. You use folders to organize and categorize your images. Create, rename, and delete folders here.

**Toolbar** - The toolbar is the menu that holds the icons. By default it holds the **Upload**, **Subfolder** and **Filter Settings** icon. On clicking a file in the manager, the toolbar shows other icons that could be used for various functions.



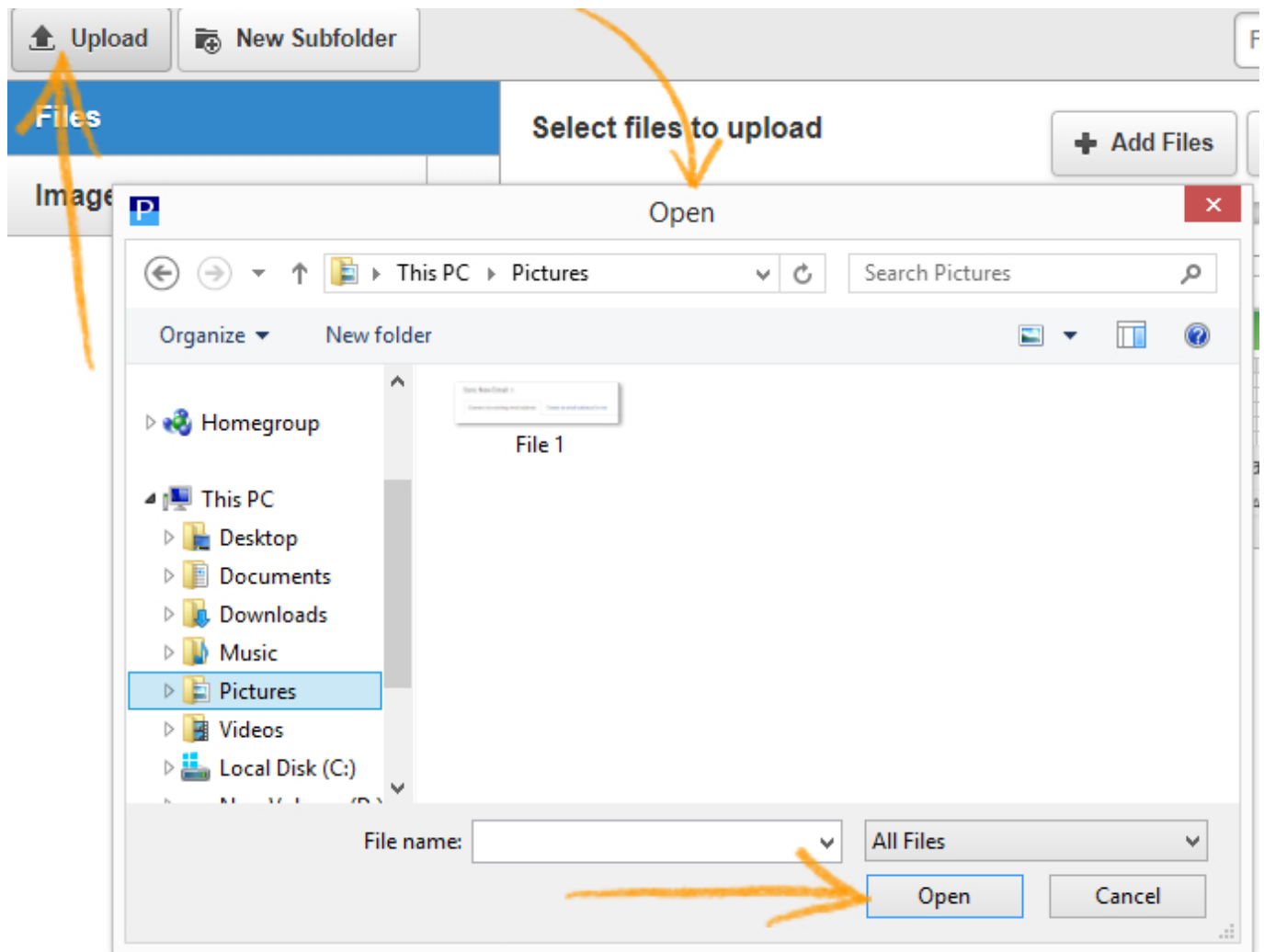
**Upload** - The upload button is used to upload files and into the manager.

**New Subfolder** - Used to add a subfolder.

**Filter settings:** The icon on the top right allows you to apply filters to the files being showed in the manager window.

## Uploading Files

The upload button is used to upload files and images into the manager. Clicking on **Upload** opens a dialog box where you can select the files and images that you want to add. Once you've selected your files, press **Open**.



## Upload Error Messages

The following error messages may appear when uploading files.

A file with the same name is already available. The uploaded file was renamed to "filename(1).ext"

This message indicates that the uploaded file name is already in use by another file in the same

folder. To avoid a conflict, a consecutive number, the "(1)", gets appended to the original name.

### Invalid file

The file that you attempted to upload was not accepted. The most common cause for this message is that the file extension is not allowed for security reasons. The file size might also be too large (the maximum file size accepted is 15mb).

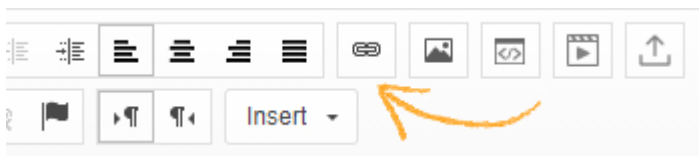
### Upload cancelled for security reasons. The file contains HTML-like data.

The uploaded file contains HTML code. For security reasons, only files with selected extensions are allowed to contain HTML code.

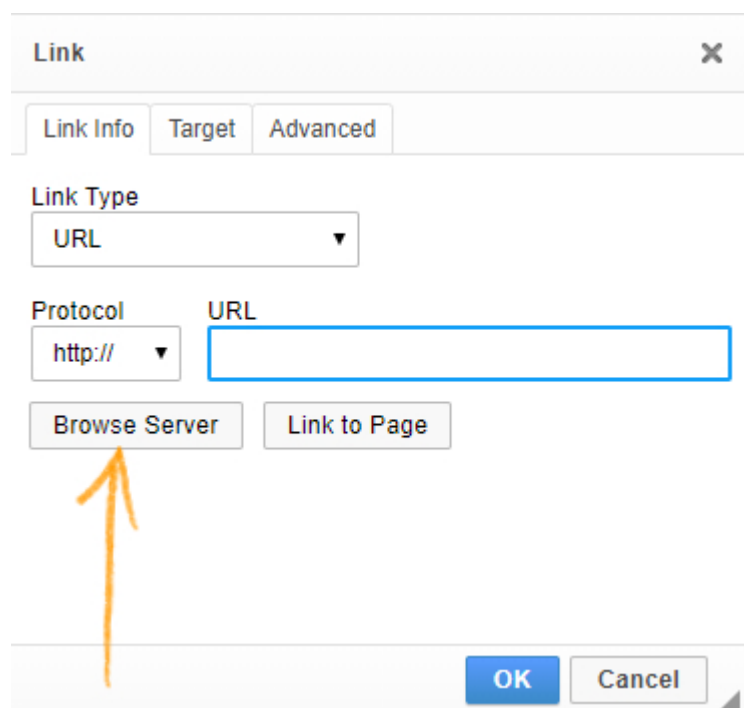
### Insert File into a Page

To insert a file such as a PDF or a document into a page, insert a hyperlink that will download the file.

- After you have uploaded the desired file as described above, edit the page.
- From the editors toolbar, select the **hyperlink** option.



- From the links overlay, select **Browse Server**, and select the file you want to insert from the file manager.



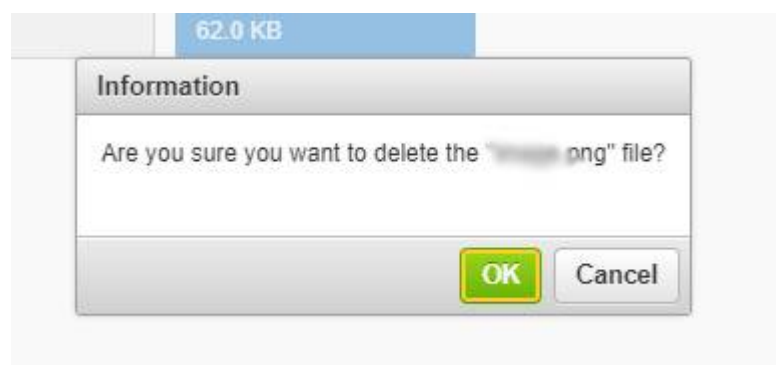
- A hyperlink will be inserted in the page.

## Insert Image into Page

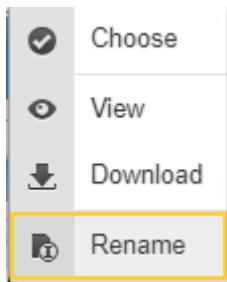
If the image has already been uploaded to your image library, you can browse the server and select the image from your file manager. See this guide for [inserting images](#). Deleting an image from the file manager will automatically remove the image from the page.

## Delete, Rename, and Move Images or Files

- To delete an image or a file, select it and press the delete button on your keyboard. Click on **OK** in the dialog box that appears.



- To rename an image or a file, right click on an image or file and select **Rename**. Renaming an image or a file will rename the image or file paths in all pages across the site.



- To move an image or a file, drag the image or file to the specific folder at the left. Click on **Move Here**. Moving an image or a file will update the image and file references across the site.
- To copy an image or a file, drag the image or file to the specific folder at the left. Click on **Copy Here**. Copying an image or a file will not affect the existing image or file and its path.

#### Related Articles:

[Working With Images](#)

[Tables](#)

[Videos](#)

# PDF

# Advanced Search

With ProProfs Knowledgebase your visitors can now find your help content even faster. Advanced Search allows users to narrow their search with more advanced fields.

[← Back to main search](#)

Search Includes:

All words ▼

Does Not Include:

Sort by:

Search

Reset

Showing 15 results

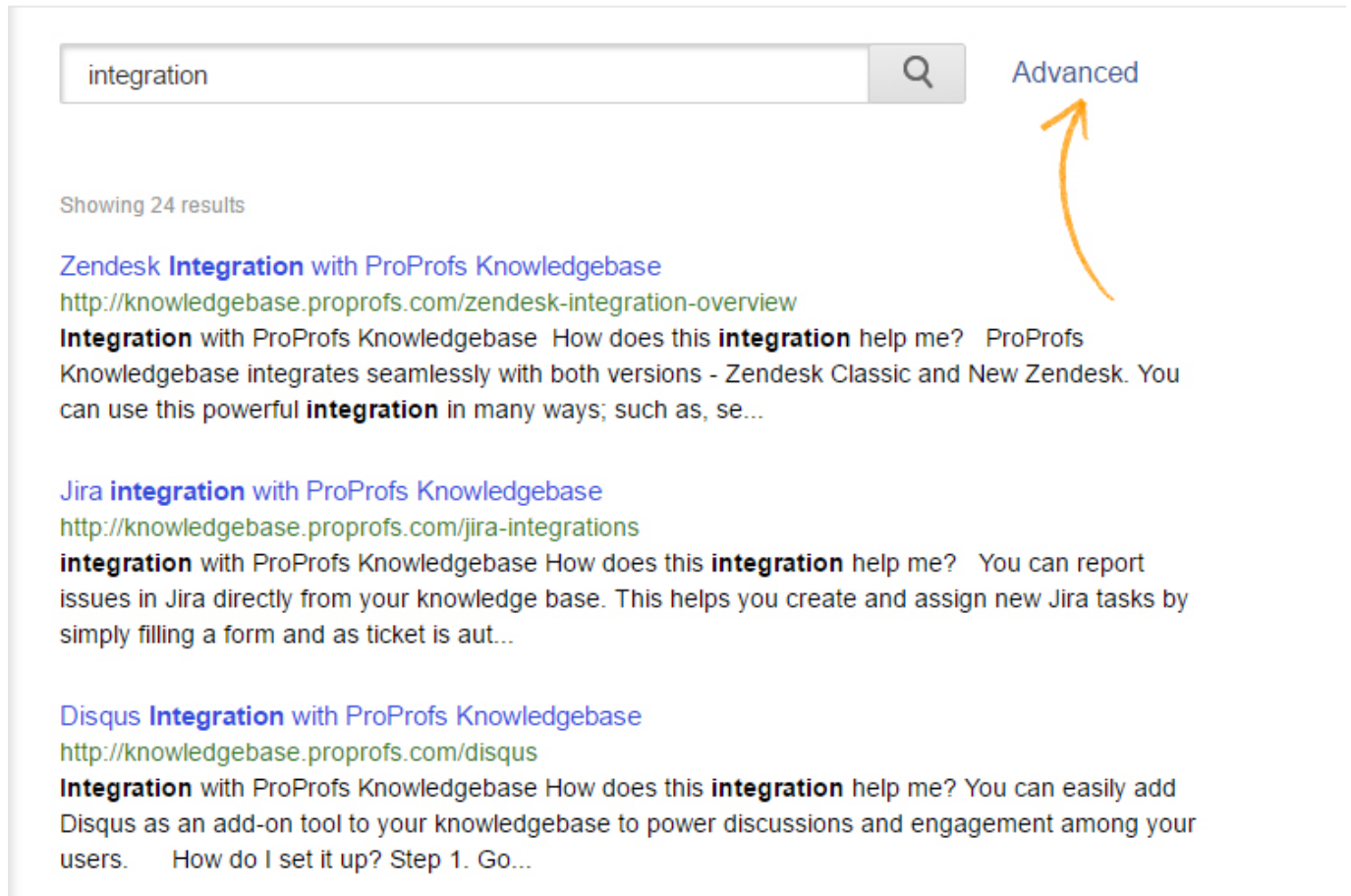
[Jira \*\*integration\*\* with ProProfs Knowledgebase](#)  
<http://knowledgebase.proprofs.com/jira-integrations>  
**integration** with ProProfs Knowledgebase How does this **integration** help me? You can report issues in Jira directly from your knowledge base. This helps you create and assign new Jira tasks by simply filling a form and as ticket is aut...

[Disqus \*\*Integration\*\* with ProProfs Knowledgebase](#)  
<http://knowledgebase.proprofs.com/disqus>  
**Integration** with ProProfs Knowledgebase How does this **integration** help me? You can easily add Disqus as an add-on tool to your knowledgebase to power discussions and engagement among your users. How do I set it up? Step 1. Go...

How can the users make use of the search function:

**Step1.** Click on the search bar and enter anything you want to search. For the sake of demonstration, we've searched "integration."

Click on "Advanced" as shown below.



The screenshot shows a search bar with the text 'integration' and a magnifying glass icon. To the right of the search bar is a link labeled 'Advanced' with an orange arrow pointing to it. Below the search bar, it says 'Showing 24 results'. There are three search results listed, each with a title, a URL, and a brief description. The first result is 'Zendesk Integration with ProProfs Knowledgebase', the second is 'Jira integration with ProProfs Knowledgebase', and the third is 'Disqus Integration with ProProfs Knowledgebase'.

integration

Advanced

Showing 24 results

[Zendesk Integration with ProProfs Knowledgebase](#)  
<http://knowledgebase.proprofs.com/zendesk-integration-overview>  
**Integration** with ProProfs Knowledgebase How does this **integration** help me? ProProfs Knowledgebase integrates seamlessly with both versions - Zendesk Classic and New Zendesk. You can use this powerful **integration** in many ways; such as, se...

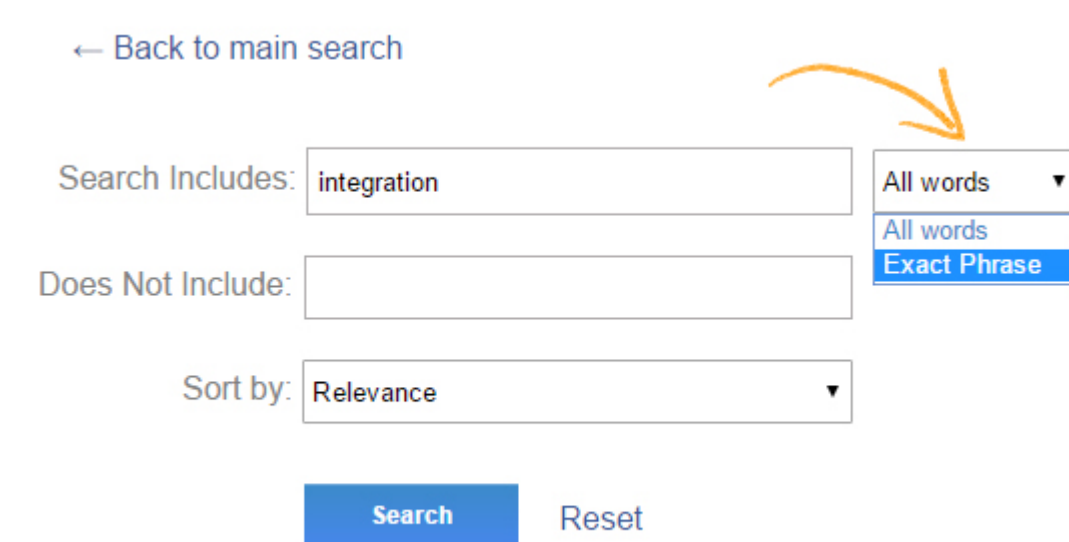
[Jira integration with ProProfs Knowledgebase](#)  
<http://knowledgebase.proprofs.com/jira-integrations>  
**integration** with ProProfs Knowledgebase How does this **integration** help me? You can report issues in Jira directly from your knowledge base. This helps you create and assign new Jira tasks by simply filling a form and as ticket is aut...

[Disqus Integration with ProProfs Knowledgebase](#)  
<http://knowledgebase.proprofs.com/disqus>  
**Integration** with ProProfs Knowledgebase How does this **integration** help me? You can easily add Disqus as an add-on tool to your knowledgebase to power discussions and engagement among your users. How do I set it up? Step 1. Go...

**Step2.** It will take you to the Advanced Search. Here, you can add details to your search. You can search either by "All words" or "Exact Phrase."

**All words:** This will search the words in search box irrespective of their order.

**Exact Phrase:** This will search the words in the search box in the specified order.



The screenshot shows the Advanced Search page. At the top left is a link '← Back to main search'. Below it are three input fields: 'Search Includes:' with the text 'integration', 'Does Not Include:' which is empty, and 'Sort by:' with a dropdown menu showing 'Relevance'. To the right of the 'Search Includes:' field is a dropdown menu with 'All words' selected, and 'Exact Phrase' is highlighted in blue. At the bottom are two buttons: 'Search' and 'Reset'.

← Back to main search

Search Includes: integration

Does Not Include:

Sort by: Relevance

All words

Exact Phrase

Search Reset

**Step3.** You can sort your search by clicking on "Sort by."

**Relevance:** This will show the most relevant search as per the added keywords.

**Last modified:** This will show the documents which were recently edited.

**Created date:** This will show the result as per the creation date of the documents.

[← Back to main search](#)

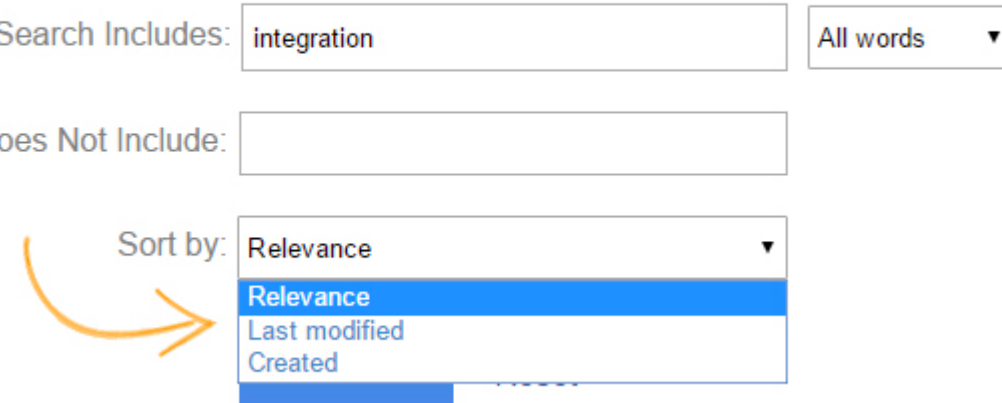
Search Includes:  All words ▼

Does Not Include:

Sort by: 

Relevance ▼

Relevance  
Last modified  
Created



## How does the Knowledge Base search engine work:

The search engine in the Knowledge Base primarily searches for the following fields:

- Article title
- Article description / Article content
- Article keywords
- TOC(Table of Content) name

The search engine prioritizes the above-mentioned fields in the following manner:

- First priority - Article title
- Second priority - Keywords
- Third priority - TOC name
- Fourth priority - Article description

**Single Keyword Term:** Any search with a single keyword term will follow the same priority logic.

**Multiple Keyword Term:** For example, the search term is 'Sales Book'

- First priority- article title with 'sales book'
- Second priority- article title with 'sales' + 'book' both
- Third priority- Article keywords with 'sales book'
- Fourth priority- Article keywords title with 'sales' + 'book' both



- Fifth priority- TOC name title with 'sales book'
- Sixth priority- TOC name with 'sales' + 'book' both
- Seventh priority- Article description with 'sales book'
- Eighth priority- Article description with 'sales' + 'book' both

#### Related Articles:

##### [Search](#)

[Add a Search Box to Zendesk Forum](#)

[SEO Search Engine Support \(Google, Bing, Yahoo\)](#)

# How to Add URL to Folders

ProProfs Knowledge Base offers you the freedom to **add URLs** to your knowledge base folders.

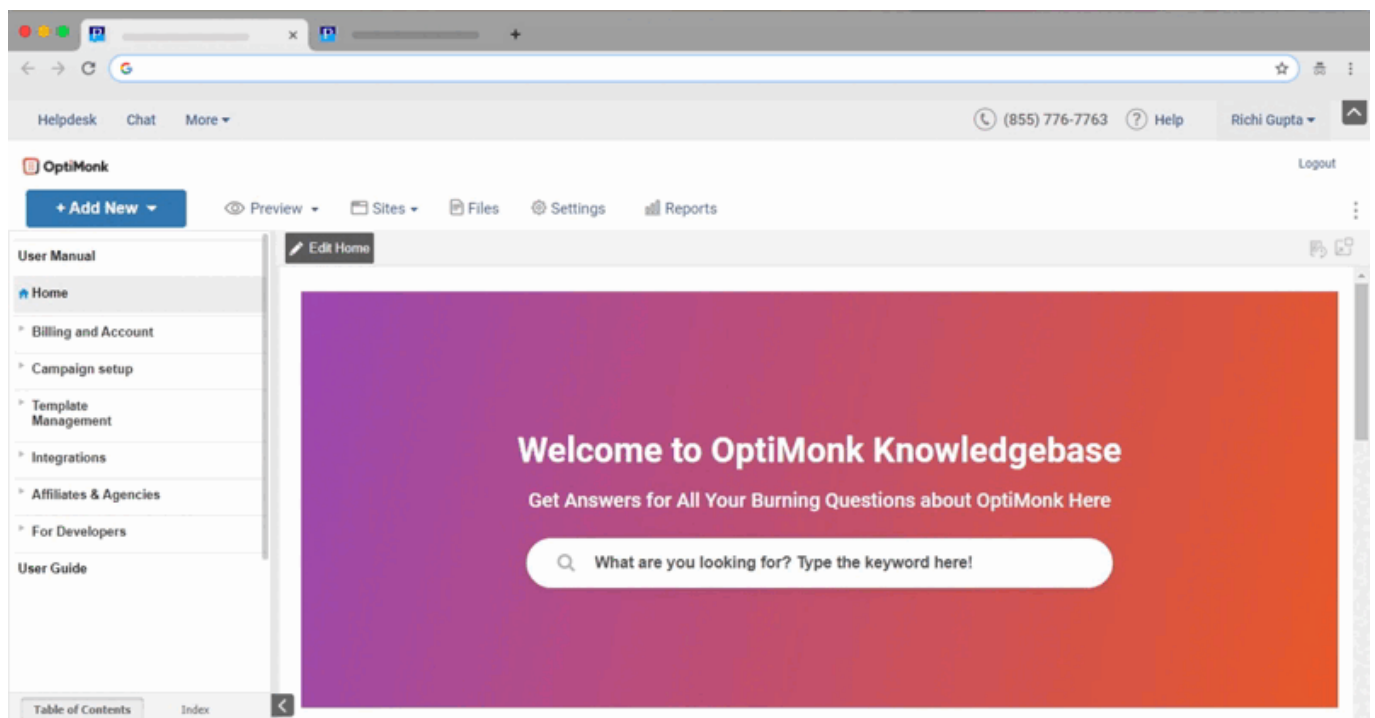
## Why do you need it?

Imagine when you want to share multiple knowledge base articles that are in the same folder. You will have to share a link to each page in that folder, but with this simple feature, you can just share the link of the folder instead of sending out individual article links.

## Here's how you can get it done:



**Step 1:** In your ProProfs Knowledge Base account,

- Navigate to '**Settings**' from the dashboard of the already chosen site.
- Open '**Table of Content**'.



**Step 2:** On this page,

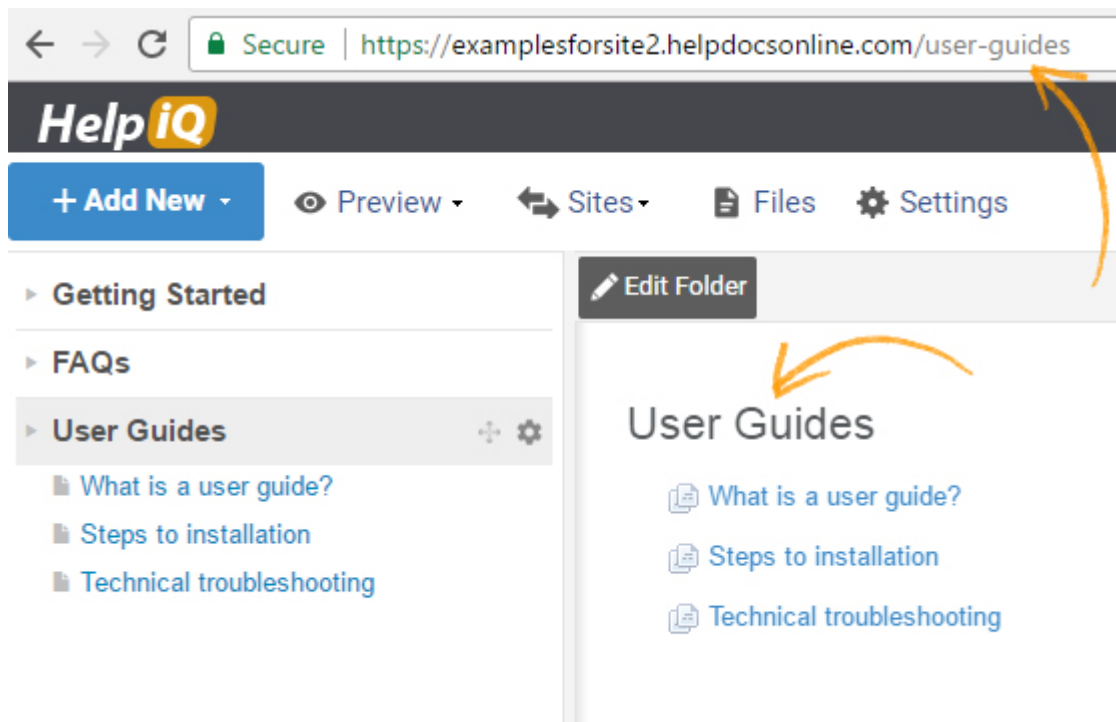
- Scroll down and enable the '**Link folder to page**' option.
- Click '**Save**' to finalize your changes.

Search	<input type="text" value="Basic (full text)"/>
Disable Copying	<input type="button" value="Yes"/> <input type="button" value="No"/>
Link folder to page	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/> 
Folder Index	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/> 
301 Re-direct	<a href="#">Manage</a> <a href="#">Learn More</a>
Find & Replace	<a href="#">Manage</a>

Here is an example of a folder URL in the ProProfs Knowledge Base:

Go to your chosen site and **select** any folder.

You will see all the **help articles** in the selected folder listed, also you can see the folder URL in the image below.



Now, instead of copying every page link, you can simply share the URL to the entire folder.

### Related Articles:

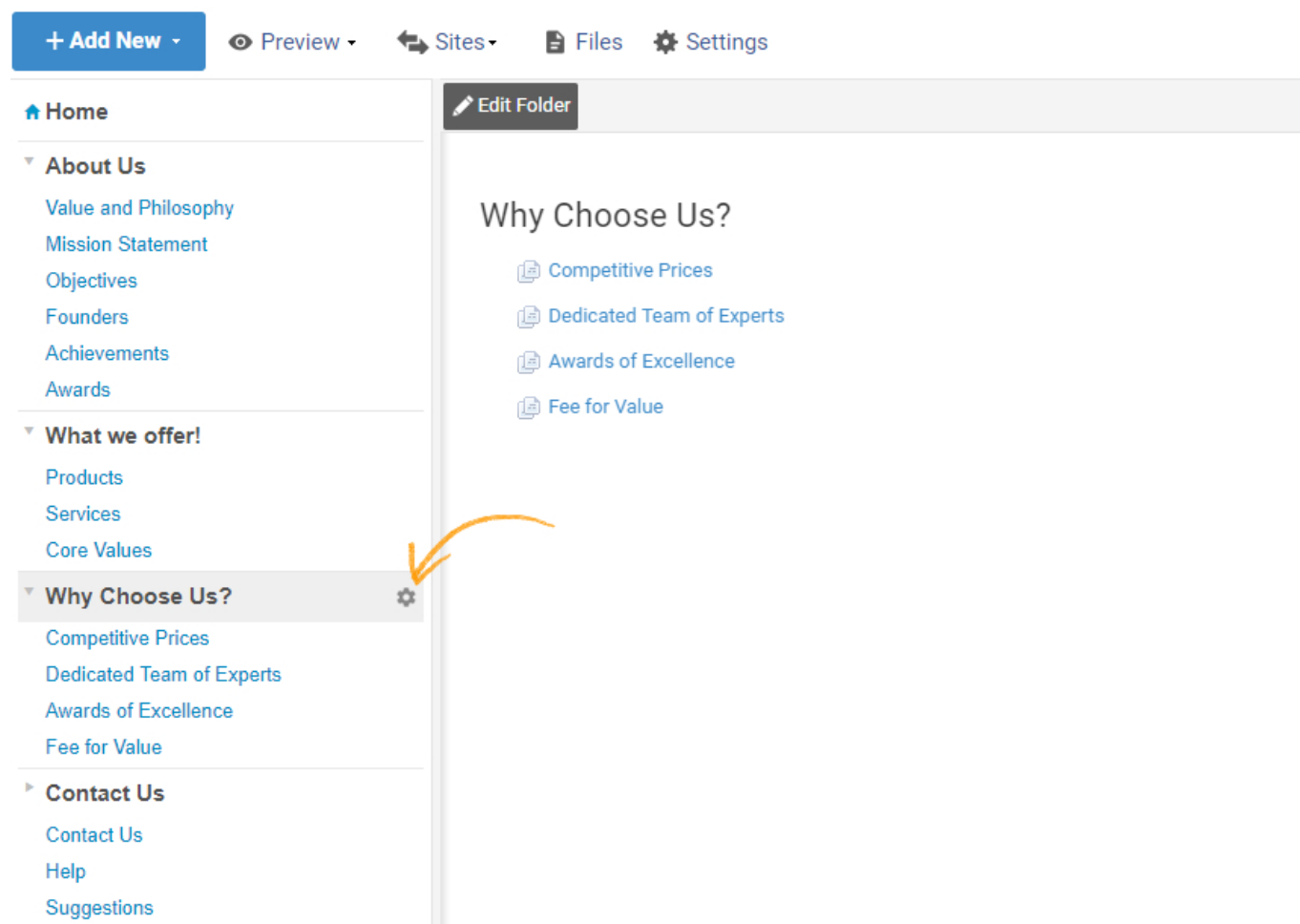
- [How to Copy a Folder Within and Across Knowledge-Bases](#)
- [How to Fix Shockwave Flash Crashes in Google Chrome](#)
- [Folder Restrictions](#)

# How to Copy a Folder Within and Across Knowledge-Bases

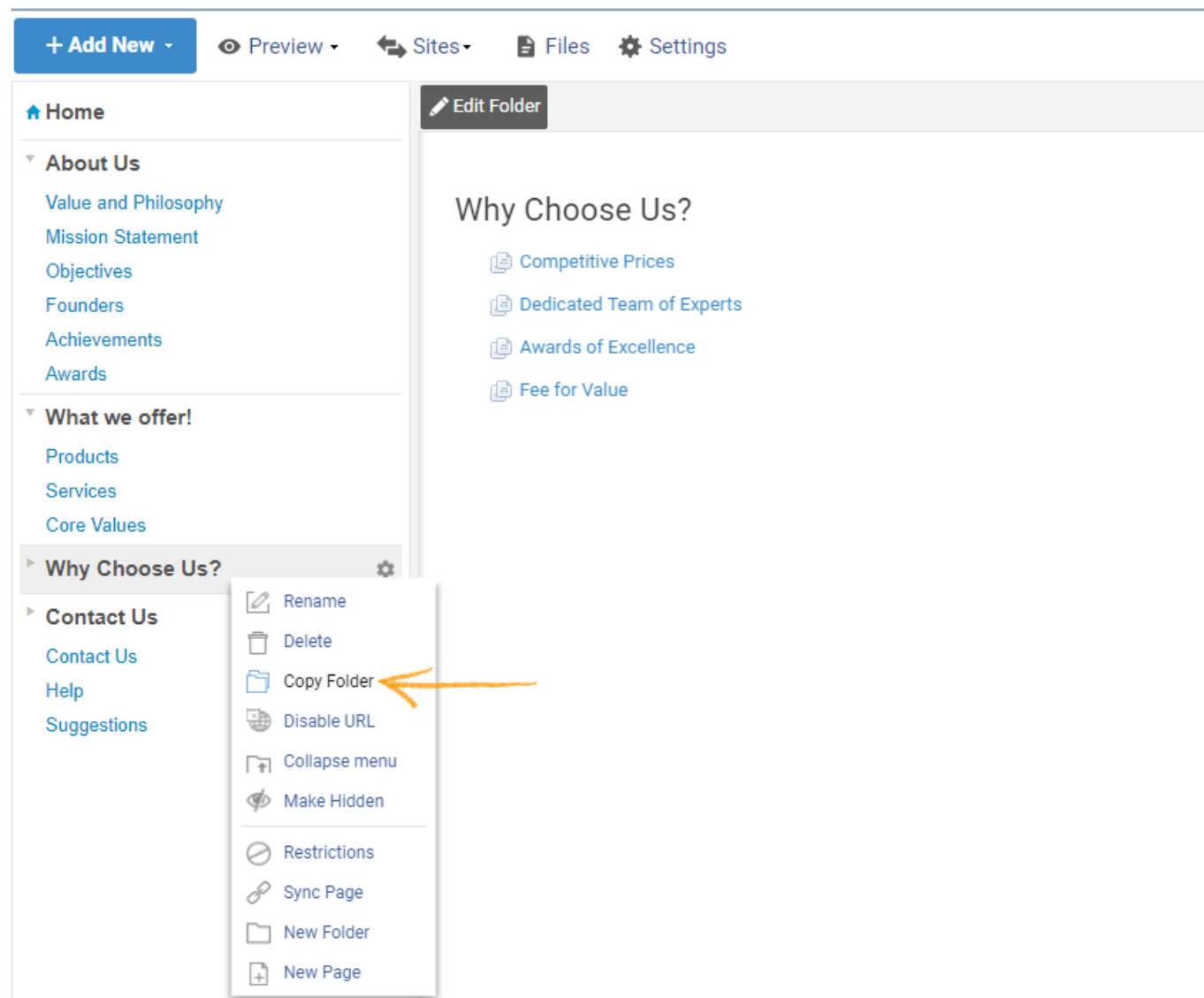
You can copy a folder within the current knowledge-base as well as to different knowledge-bases.

Here's how to copy a folder within current Knowledge-base:

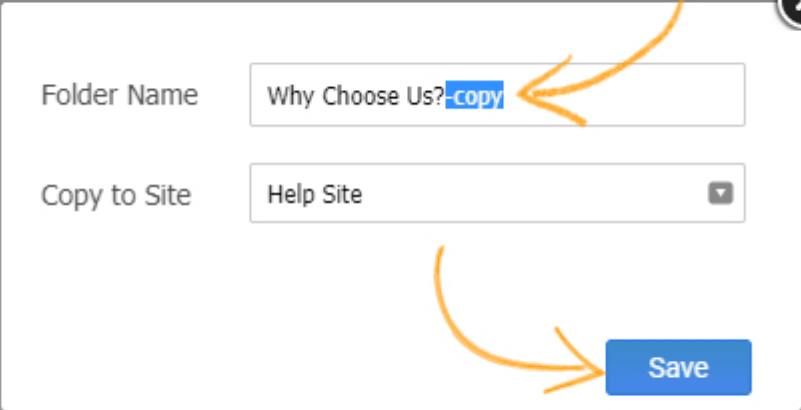
**Step 1:** Log into your account. Select the folder to copy, and click the 'context menu' icon.



**Step 2:** Click "Copy Folder" from the context menu.

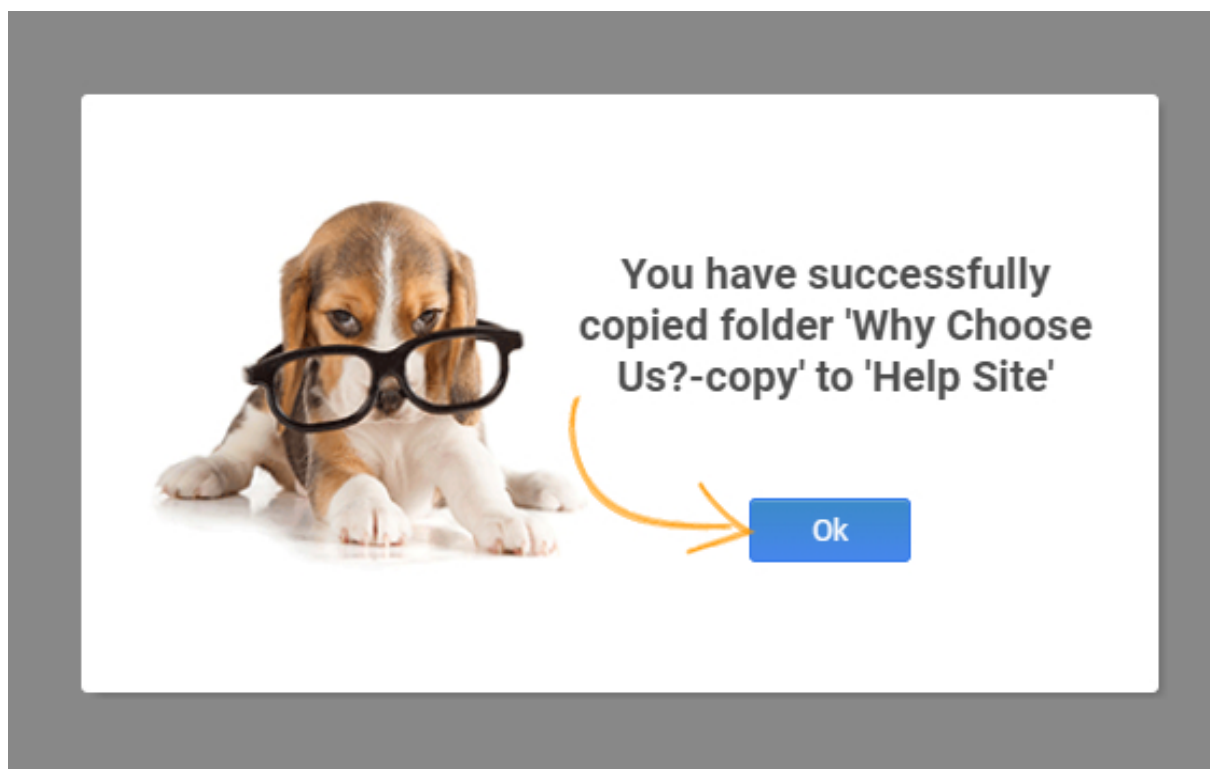


**Step 3:** A pop will appear, edit the name of the folder accordingly. Click "Save" to copy the folder.

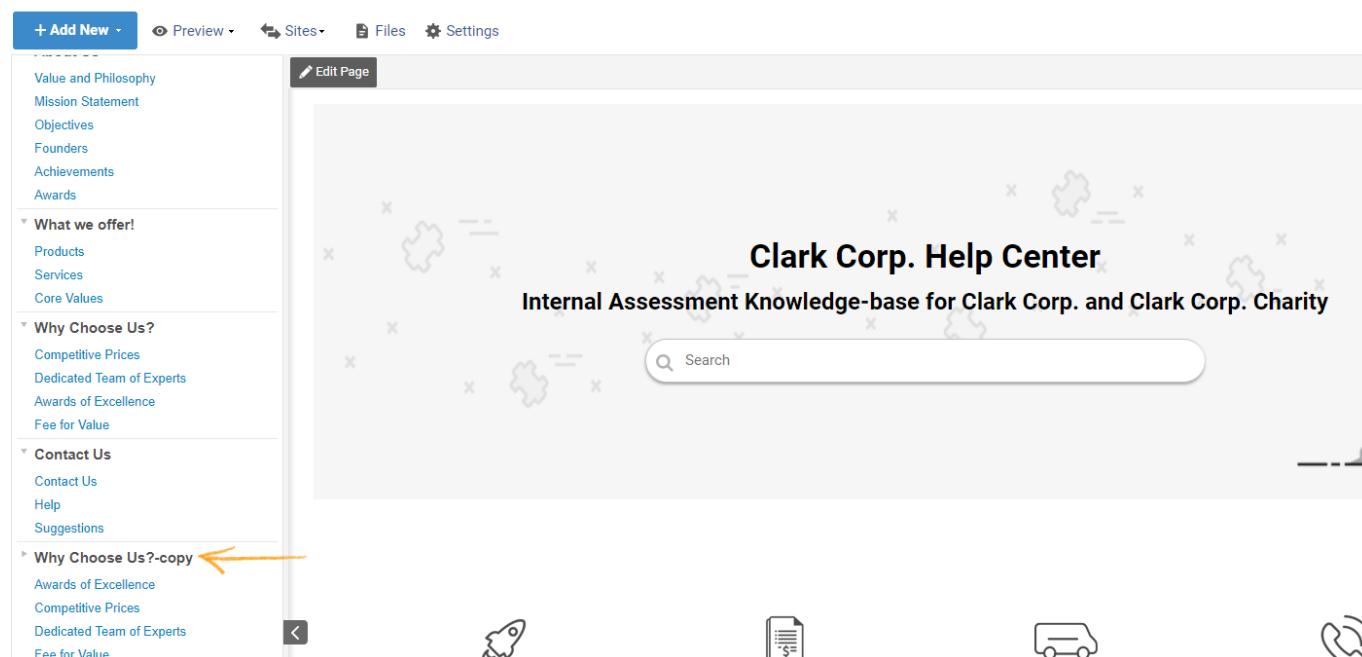


A screenshot of a 'Copy to Site' dialog box. The dialog has a title bar with a close button (X). It contains two input fields: 'Folder Name' with the text 'Why Choose Us?-copy' and 'Copy to Site' with the text 'Help Site'. A blue 'Save' button is at the bottom right. Two orange arrows point to the 'Folder Name' field and the 'Save' button. A small square icon is visible in the bottom right corner of the 'Copy to Site' field.

**Step 4:** You will get a confirmation message. Click "OK" to complete the process.

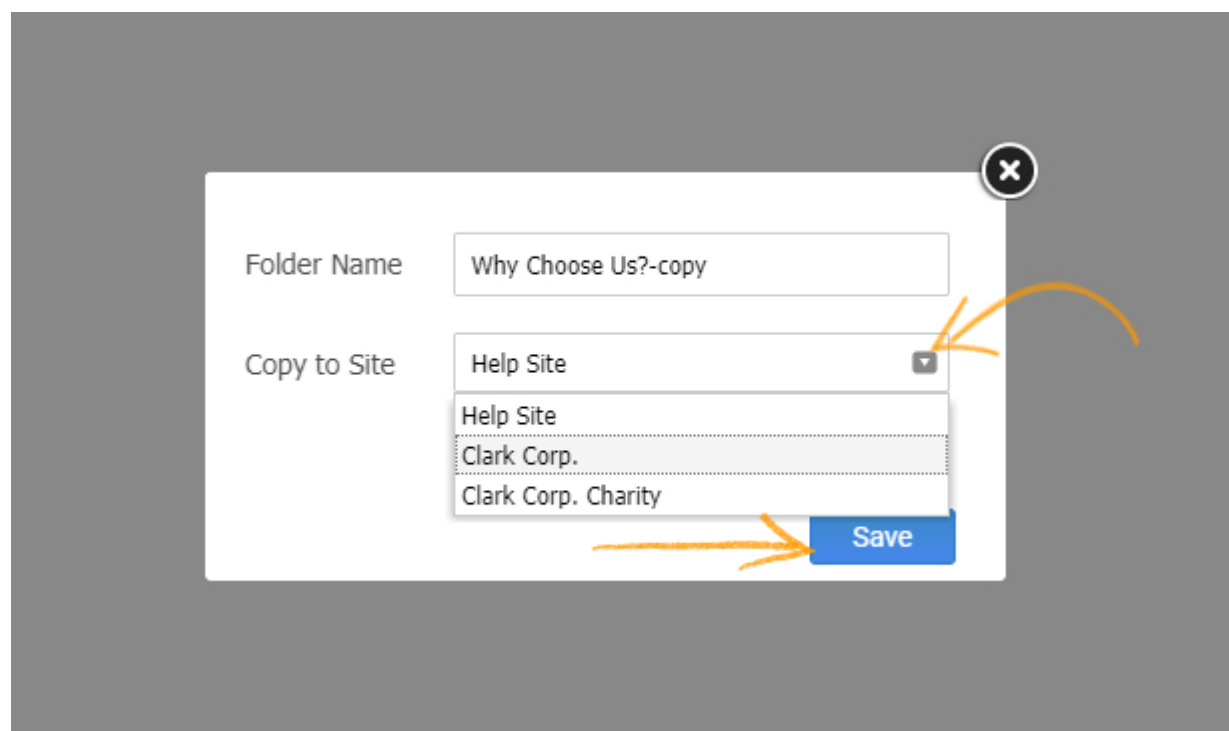


Here's how the copied folder appears in the current Knowledge-base:

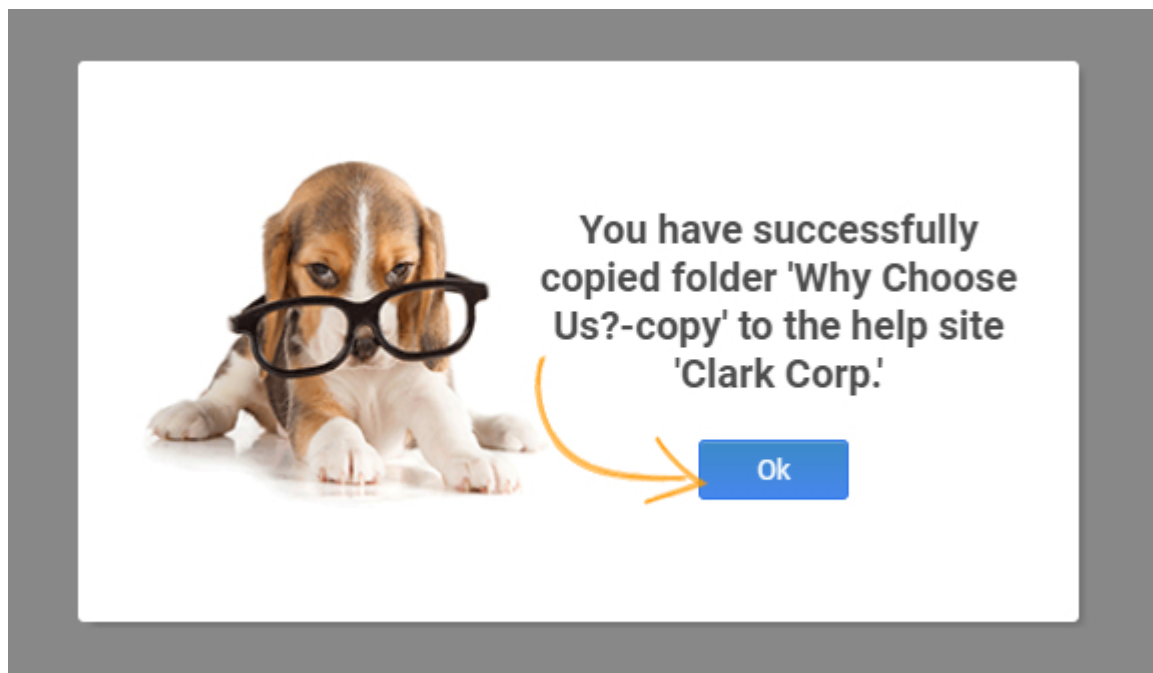


To copy a folder to different Knowledge-base follow [Step 1](#) and [Step 2](#), and jump to the below steps to complete the procedure:

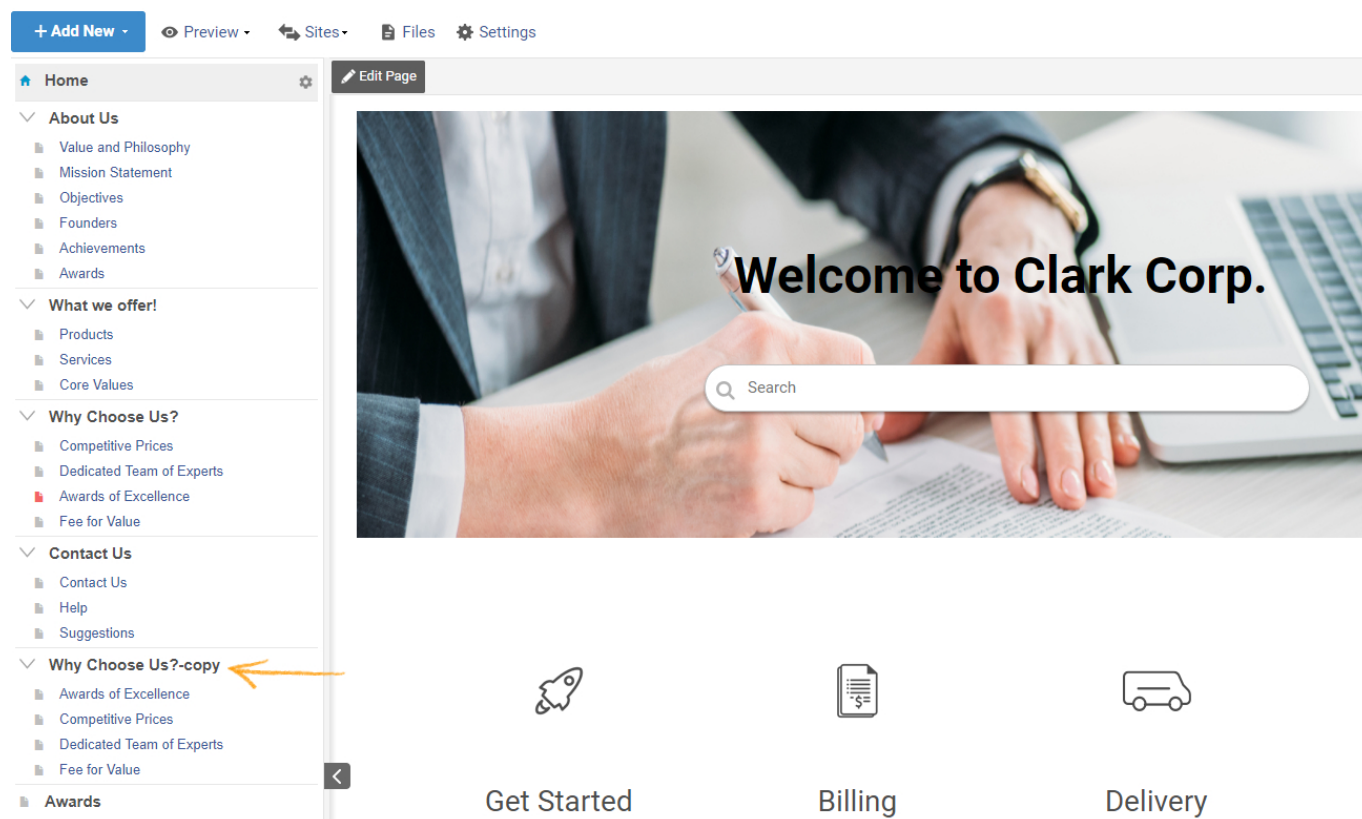
**Step 3:** A pop will appear, edit the name of the folder accordingly. Click 'drop-down menu' icon and select a site. Click "Save" to copy the folder to the selected site.



**Step 4:** You will get a confirmation message. Click "OK" to complete the process.



Here's how the copied folder will appear in chosen Knowledge-base:



#### Related Articles:

[How to Add URL to Folders](#)

[How to Fix Shockwave Flash Crashes in Google Chrome](#)

[Folder Restrictions](#)



# Troubleshooting Web Browsers

ProProfs is powered with the latest HTML5 technology to ensure that your help site works across all major browsers and operating systems. Your help site will work perfectly on browsers such as Firefox, Internet Explorer, Safari, Google Chrome, Opera, and operating systems such as Windows, Mac or Linux.

However, at times your browser may not function properly because of cookies, cache, add-ons etc. If you are not seeing what you are supposed to, one of these fixes below should resolve the issue.

## Clear Your Browser's Cache and Cookies

Clearing your browser's cookies and cache can force the webpage to reload properly.

### 1) Clear your browser's cache

Every web browser stores a cache of the websites you visit (e.g., HTML pages, images) to reduce bandwidth usage and server load. This is called the browser's cache. Clearing it makes ProProfs run faster and frees up space on your computer's hard drive if it's running low. Since every browser is different, follow this guide to clear your browser's cache.

### 2) Clear your browser's cookies

Websites store data on your computer using small files called cookies. It is a good idea to clear your cookies at the same time you clear your cache. Since every browser is different, follow this guide to delete your browser's cookies.

## Disabling Browser Add-ons and Plug-ins

Each web browser comes with optional additions called plug-ins. These plug-ins can sometimes cause problems. Common uses of add-ons and plug-ins include toolbars, news or stock tickers, instant messaging, weather alerts, email alerts, anti-virus or anti-spyware, or games. To find out if add-ons or plug-ins are causing problems, please follow this guide for disabling browser add-ons and plug-ins.

## Update Your Browser

For best results we recommend you use the latest version (but not a beta version) of your browser. Firefox is our recommended browser.

- [Firefox \(FF\)](#)
- [Internet Explorer \(IE\)](#)
- [Safari](#)
- [Google Chrome](#)
- [Opera](#)

Please note: We do not support Internet Explorer 6. Please download one of the browsers above.

**Suggested Reading:** [How to Fix Shockwave Flash Crashes in Google Chrome](#)

# Settings

# Add and Customize a Site













ProProfs allows you to create and manage multiple documentation websites under a single login. Each site has its own pages, color theme, CSS, domain name, and other features. If you have several products that you sell, you might want each product to have its own documentation site with its own page topics, color theme, and so on. ProProfs makes this easy. Logged-in users can easily jump between your different ProProfs sites under a single login, but your customers will think they are on two different sites.

- [Adding a New Site](#)
- [Settings](#)
- [Branding](#)
  - [Site Header](#)
    - [Using the Default Header](#) (uploading logo, etc.)
    - [Using Your Own HTML/CSS Header](#)
    - [Zendesk Header](#)
- [Other Tabs](#)

## Adding a New Site

1. Log in to your account (as an Administrator) and click **Settings**.
2. Click on **Configure & Brand**.
3. Click **New Site**.

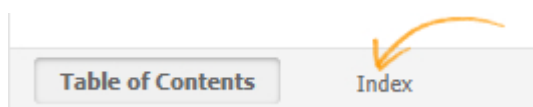
**Setup Sites** [← back to settings](#)  
[Learn more](#)

Site	Language	URL	 <a href="#">+New Site</a>		
<a href="#">Help Site</a>	English - (United States) (default)	<a href="http://clarkbruce.helpdocsonline.c...">http://clarkbruce.helpdocsonline.c...</a>			
<a href="#">Clark Corp.</a>	English - (United States)	<a href="http://clarkcorp.helpdocsonline.co...">http://clarkcorp.helpdocsonline.co...</a>			
<a href="#">Clark Corp. Asia</a>	English - (United States)	<a href="http://clarkcorpasia2.helpdocsonli...">http://clarkcorpasia2.helpdocsonli...</a>			
<a href="#">Clark Corp. Charity</a>	English - (United States)	<a href="http://clarkcorpcharity.helpdocson...">http://clarkcorpcharity.helpdocson...</a>			

When adding or editing a site, you will find two tabs. The first tab is for your site's settings. The second tab is for branding.

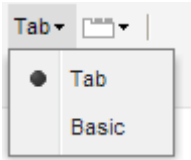
## Settings

- **Site Language** - Select the site's language. Selecting a site's language will change the site's interface text to the selected language. Read more about [multiple languages](#).
- **Site Address** - This will be the URL of your site. Each site you create will have its own URL. You have the option to use your own custom domain name (such as help.mydomain.com) by clicking Setup your own domain. Read more about [custom domains](#).
- **Site Name** - This is the site's name. The name will appear in the web browser's title bar in this format: [Page Title] - [Site Name]
- **Start Page** - The start page is the page that first shows when a user visits your site. You can change the start page here to any page. To change the start page, click on the **Select** button. An overlay will open up with a list of pages. Click on the page title of the page that you want to be the new start page.
- **Breadcrumb** - Enable breadcrumb to help users navigate your knowledge base easily.
- **Hide Global Search Box** - You can hide the search box on the top right from the home page. If you have a large search box on the home page you may not want to have another search box on the top right so now you can hide that search box.
- **Table of Contents** - This controls the table of contents.
  - **Enable TOC** - This will show or hide the entire table of contents.
  - **Style** - Choose a table of contents style.
  - **Hide Empty Folders** - Select this option if you want empty folders to be hidden when logged out. Folders will hide if there are no published pages inside of it.
  - **Show page icon** - This will show or hide the icon for a page.
  - **Width** - This sets the default width of the side table of contents.
  - **Background color** - This sets the background color.
  - **Link Color** - This sets the color of the page links
- **Keyword Index** - Checking or unchecking this will show or hide the keyword index tab.

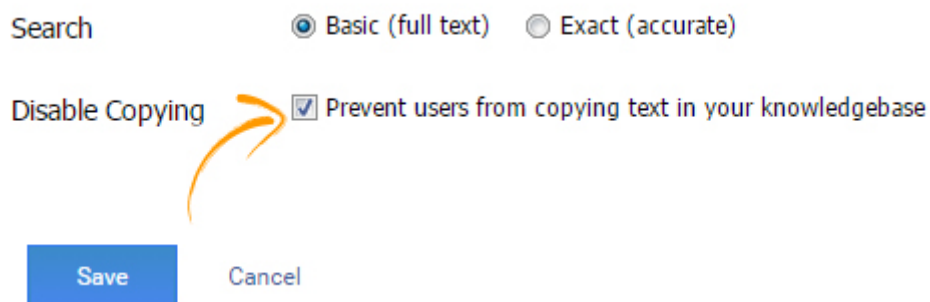


- **Default View** - You can control the default view for the site. The default view is what new users will see when they first visit your site.

- **Tabs** - Each tab will display a distinct page. Users can open multiple tabs that interest them (like bookmarking).
- **Basic** (no tabs) - Only one page will display at a time.
- **Allow users to change their own view** - If this option is checked, users will be able to choose their own view. If it is unchecked, the drop-down menu will be hidden.



- **Share** - This will turn on social sharing such as Facebook, Twitter and Google+ for your site.
- **Search Type-**
  - **Basic Search** - Also known as full-text search, this pulls up the most relevant documents for the search terms specified by the user in your knowledge base search.  
**Tip\*** Use this for your public knowledge bases, where most readers search without prior knowledge of the exact name/title of the article or document they are looking for.
  - **Exact Search** - This pulls up only those articles, documents or files that have the exact word or phrase as in the search terms specified by the user in your knowledge base search.  
**Tip\*** Use this for your private knowledge bases, where team members, employees, and partners can quickly pull up precise information by specifying the exact title or name of a document or article.
- **Disable Copying** - You can prevent your knowledgebase content from being copied by users.

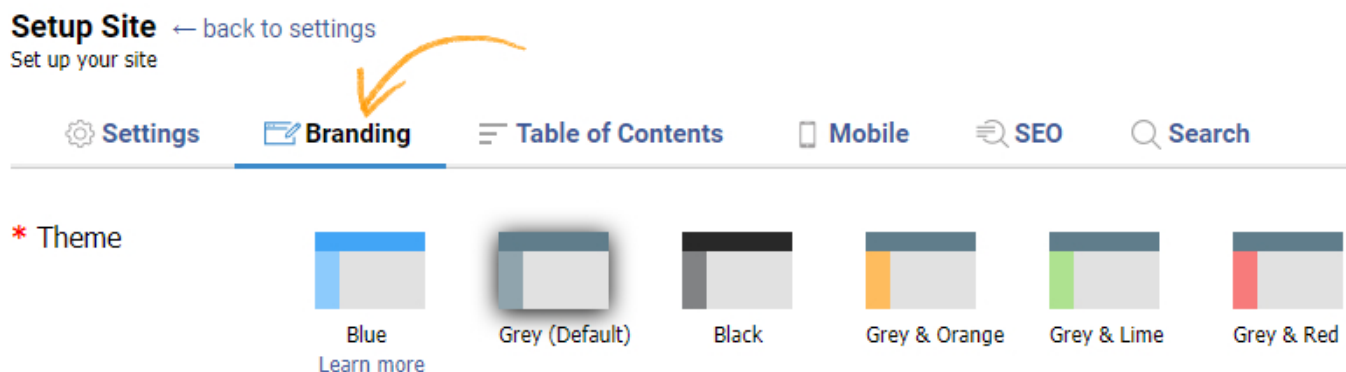


## Branding

To change the branding of your site:

1. Log in to your account (as an Administrator) and click **Settings**.
2. Click on **Configure & Brand**.

3. Select the site you want to edit.
4. Click on the **Branding** tab.



- **Theme** - You can select from different themes to match your company's branding. Changing the theme will instantly refresh the screen so that you can preview the theme.
- **Favicon** - You can reinforce the visual identity of your site by using a [favicon](#). The favicon appears in your browser's address bar. For the best results make sure the icon's width and height are the same. You can also use a [free tool](#) to create your favicon before uploading it to ProProfs.

## Site Header

You can customize the top header/nav of your ProProfs site.

### Default Header

The default header works well for most companies and gives you lots of control over customizing your site.

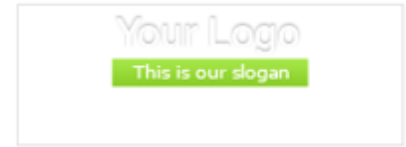
**Site Header** ☒ Use Default ☐ Use Your Own Header (Custom HTML/CSS) ☐ Zendesk Header

**Header Logo**    
We recommend a logo size no larger than 150px in height. Logos larger will be resized to scale.

**Header Color**  **Text**   
[\(Revert to default\)](#) [\(Revert to default\)](#)

**Header Background Image**      
We recommend the image size be no larger than 200px tall.

**Header Height**   pixels. This will be the height in pixels



X delete



X delete

## Upload Your Own Logo

- You can upload your own logo to appear in the top left corner of your pages.
- Before you start, make sure you have a copy of your logo saved to your computer.
- Your image's file type must be one of these: .jpg, .gif, or .png.
- Your file size must be less than 200KB.
- The logo size must be less than 150 pixels in height. If your logo is larger than that, it will be scaled down (keeping the aspect ratio locked).
- When you upload a logo, you automatically replace the current logo.

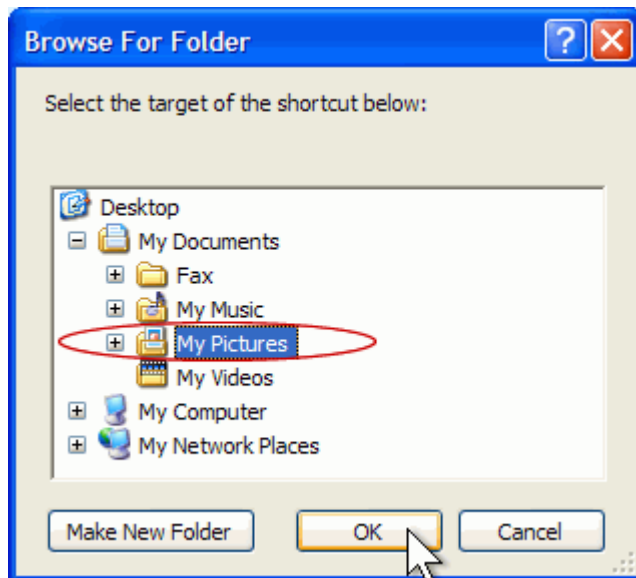
Follow these steps:

1. Click the **Browse** button.

**Header Logo**   

2. A new window opens. Now browse your computer for a logo picture. Find the picture, select it, and then click OK.

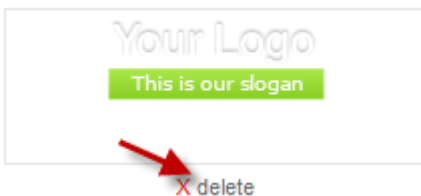




3. The logo will automatically upload and appear in the header.

### Delete or Change Your Logo

- To change the logo, just follow the steps above to upload a new logo. The old logo will automatically be replaced by the new one.
- If you would like to delete the logo, you can do so by selecting **delete** in the logo preview window.

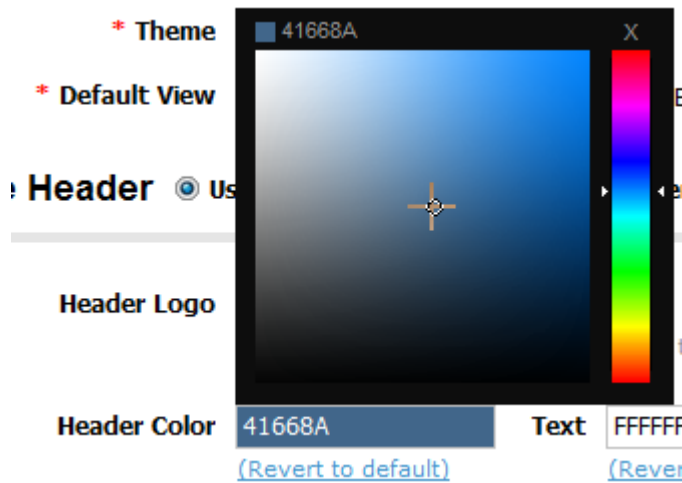


If your logo looks distorted or squashed, then check that your logo file does not exceed the maximum height of 150 pixels. The system will automatically resize logos larger than that.

### Header Background Color

You can use a header color or a header background image. To change the background color, follow these steps:

1. Delete the header background image (if there is one).
2. Click on the input field. A color picker will appear.



3. Select the color you want. As you change the color, the color in the header will change to give you a real-time preview of the color.
4. Click outside of the color picker to close it.
5. Click the **Save** button.

If you want to revert back to the original color, click under the input on **(Revert to default)**. This will restore the original color.

### Header Text Color

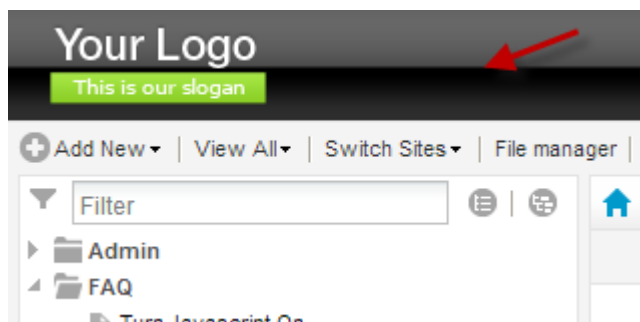
You can also change the color of the text used for the Log in and Log out button (in the upper right-hand corner of the header).

1. Click on the **Text** input field.
2. The color picker will appear. Select the color you want.
3. Click outside of the color picker to close it.

If you want to revert back to the original color, click under the input on **(Revert to default)**. This will restore the original color.

### Upload Your Own Background Image

You can also use your own background image for the header. This will allow you to use gradients and other design elements in your header.



Here is an example using this image with a repeat-X (so it repeats to fill the header):

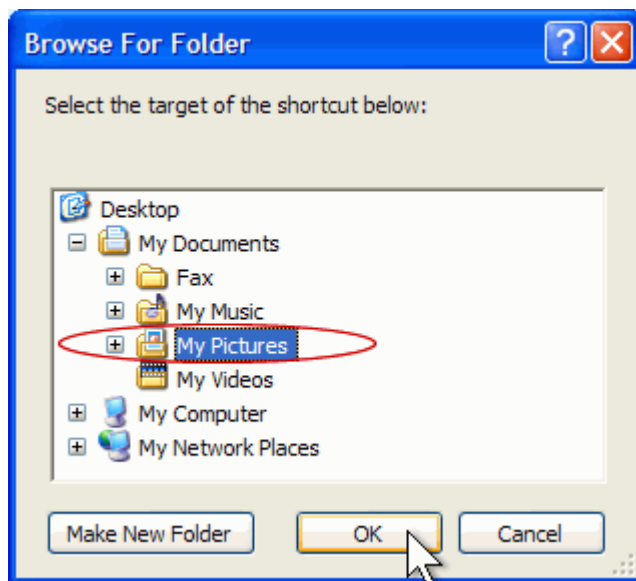


To upload your own header background image, follow these steps:

1. Click the **Browse** button.



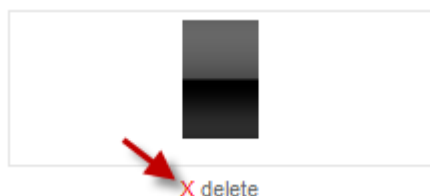
2. A new window opens. Now browse your computer for the header background image. Find the image, select it, and then click OK.



3. The background will automatically upload and appear in the header.
4. Select the repeat. This is the same as the CSS class {background-repeat} and will have the following options:
  - **repeat-x** - The header background image will be repeated only horizontally.
  - **repeat-y** - The header background image will be repeated only vertically.
  - **no-repeat** - The header background image will not be repeated.

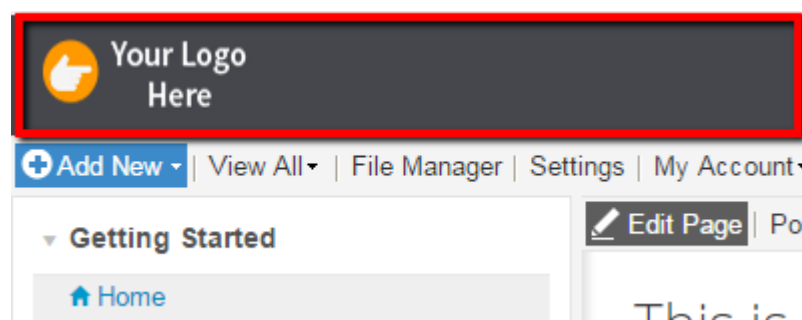
### Delete or Change the Header Background Image

- To change the header background image, just follow the steps above to upload a new header background image. The old image will automatically be replaced with the new one.
- If you would like to delete the header background image, you can do so by selecting **delete** in the preview window.



## Header Height

You can also control the height of the header.



- The default height is 45 pixels tall.
- To change the header height, enter the desired value in the **Header Height** input field.
- The header will change in real time.

Once you have finished adding and customizing your site, click the **Save** button.

## Using Your Own HTML/CSS Header

If you are familiar with HTML/CSS, we make it easy to use your own HTML header. To use your own header, click on **Use Your Own Header (Custom HTML/CSS)**.

**Site Header** ☐ Use default ☒ Use your own header (Custom HTML/CSS) ☐ Zendesk header

**CSS Code** [Learn about custom headers](#) [Download sample](#)

```
/*CSS Reset - It is recommended you keep this*/
div, dl, dt, dd, ul, ol, li, h1, h2, h3, h4, h5, h6, pre, form, fieldset, input, p, blockquote, th, td
{margin:0; padding:0;}
img, body, html {border:0;}
ol, ul {
list-style:none; }
caption, th {text-align:left;}
h1, h2, h3, h4, h5, h6 { font-size:100%;}
q:before,
q:after {content:"";}
```

**HTML Code**

```
<div id="navmain">
<div id="login"><a href="#">{login}</a></div>
<ul class="basictab">
<li><a href="#">Home</a></li>
<li><a href="#">Tour</a></li>
<li class="selected"><a href="#">Documentation</a></li>
```

You can use {login} in your HTML code where you want the log-in/log-out link to appear

## CSS Code

- The first box is for your header's CSS.
- You need to copy and paste your header's CSS into this box. It is recommended that you test it on your local computer first.
- If you are taking code from your current website, it is recommended that you **only** copy the CSS for the navigation and header. Do not copy CSS from other areas of your website.
- To avoid any conflicts with the application's CSS, use selectors such as .class,#id for all your elements.
- Do not use CSS selectors like BODY, P, TABLE, H1, \*, or any other generic selector. This will cause conflicts with the application's CSS. Use defined selectors such as .class,#id for all your elements.
- Below is the correct format for the CSS:

```
#login a:link, #login a:visited {
    font-family: Verdana, Geneva, sans-serif;
    color: #FFF;
    font-size: 11px;
}
#navmain {
    background-color: #0075CE;
}
.basictab {
    padding: 3px 0;
    margin-left: 25px;
    font: bold 13px Verdana;
    border-bottom: 1px solid #0075CE;
    list-style-type: none;
    text-align: left;
}
.basictab li {
    display: inline;
    margin: 0;
}
.basictab li a {
    text-decoration: none;
    padding: 3px 7px;
    margin-right: 3px;
    border: 1px solid gray;
    border-bottom: none;
    background-color: #f6ffd5;
    color: #2d2b2b;
}
```

## HTML Code

- You need to copy and paste your header's HTML into this box. It is recommended that you test it on your local computer first.
- Do not enter in JavaScript or links to JavaScript files <script src="file.js">

</script>

- If your header has a search box, please remove it. No <Form> elements are supported.
- Do not enter in dynamic or server-side code such as PHP, ASP, JAVA
- ONLY pure HTML is supported at this time.
- Below is the correct format for the HTML:

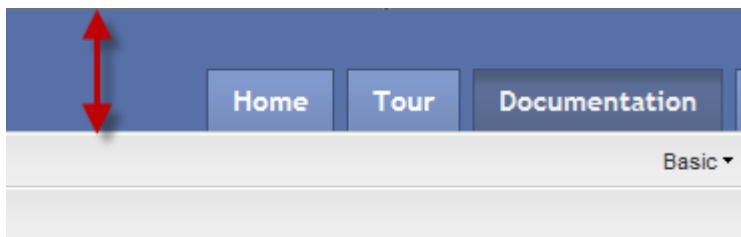
```
<div id="navmain">
<div id="login">{login}</div>
<div id="logo"> </div>
<ul class="basictab">
<li> <a href="#">Home</a></li>
<li> <a href="#">Tour</a></li>
<li class="selected"><a href="#"> Documentation</a> </li>
<li> <a href="#">Forums</a></li>
<li> <a href="#">FAQ</a></li>
<li> <a href="#">Contact Support</a></li>
</ul>
</div>
```

### Adding a Log in/Log out Link

- To add a log in/log out link to your custom header, simply insert {login} in your HTML code.
- The application will automatically insert the correct link. *Log in* when you are not signed in, and *log out* when you are signed in.

### Header Height

You can also control the height of the header.



- The default height is 45 pixels tall.
- To change the header height, enter in the desired value in the **Header Height** input field.
- The header will change in real time.

Once you have finished adding and customizing your site, click the **Save** button.

### Other Important Notes

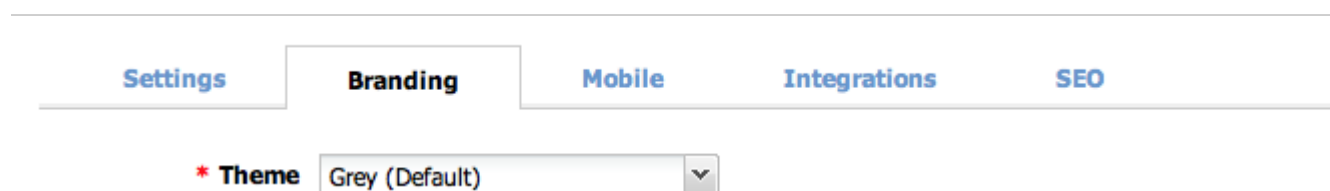
- The images in your HTML code can be hosted on your own server. For example the logo could be `` or you can upload the image using the image manager and right-click on it to get the path.

## Zendesk Header

You can also use the same header you have on your Zendesk site. See the [Zendesk Header](#) page.

## Other Tabs

You will also see additional tabs on the top which are explained in detail in other sections



- Guide to setting up [Mobile](#)
- Guide to integrating with [Google](#) or [Zendesk](#)
- Guide to making your site [SEO](#) crawlable

### Related Articles:

[Edit or Delete a Site](#)  
[Duplicate/Clone a Site](#)  
[Custom Domain](#)

# How to Enable the Notification for Article Updates

ProProfs Knowledge Base lets you notify users when you've published a new article or updated an existing one. If you wish otherwise, you also have the choice to disable this notification.

**Notifying users** of new information in your knowledge base **keeps them up to date** about your product or service.

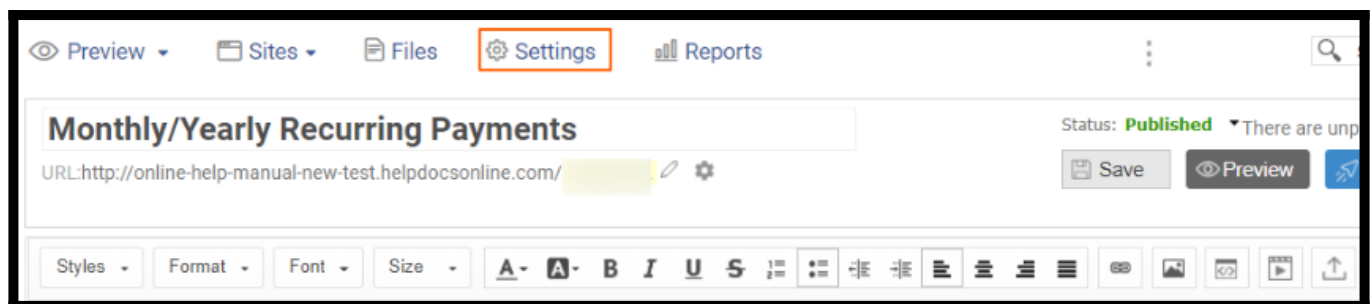
**Here's an example** of the permission pop-up you will see every time you hit the **'Publish'** button.



**NOTE:** Notification alerts are turned off by default. So you have to first turn it on under **Settings**.

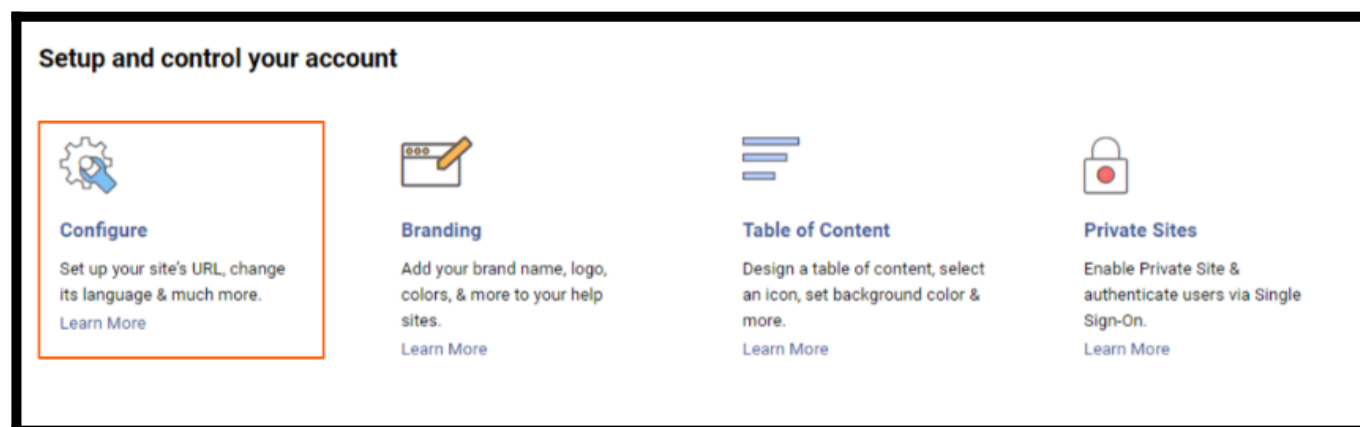
**Enabling or disabling the notification is easy:**

**Step 1:** Click **Settings** in the navigation menu.

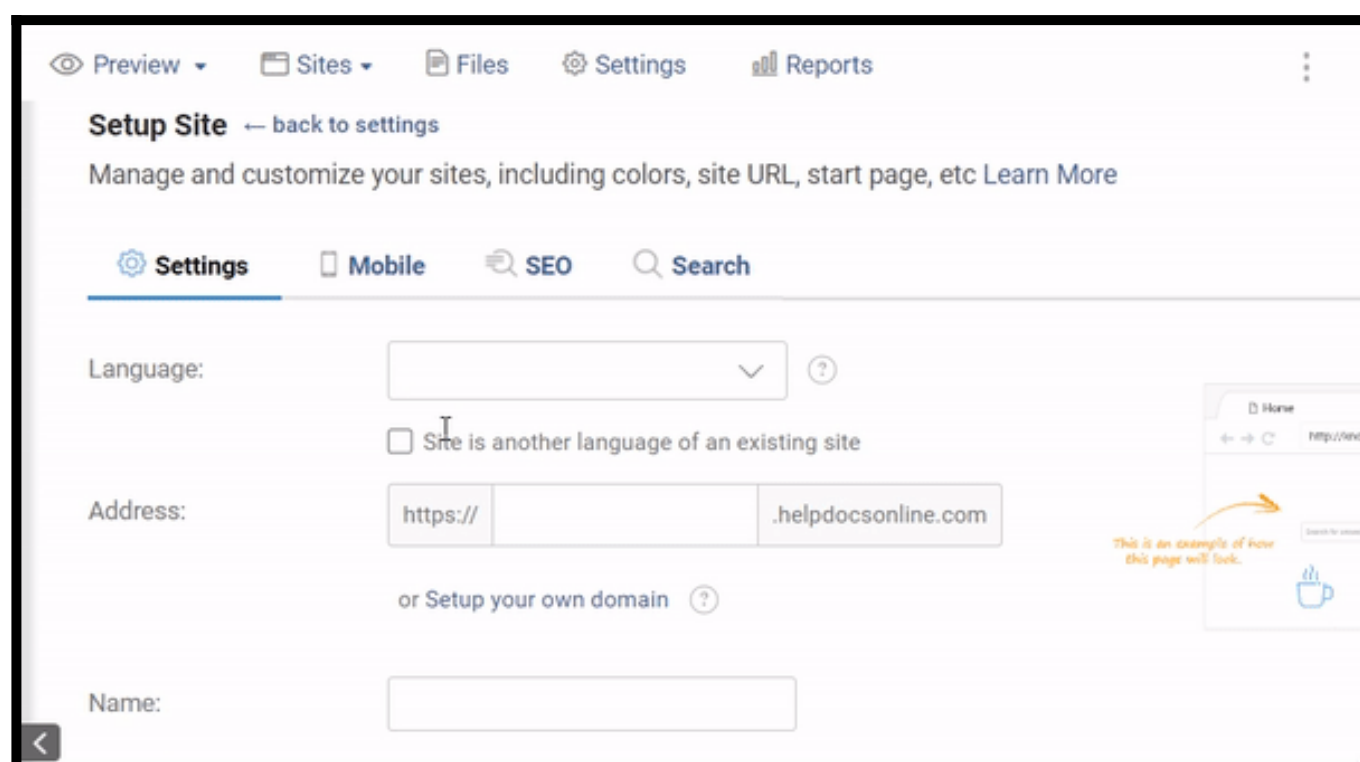


**Step 2:** Select **Configure**.

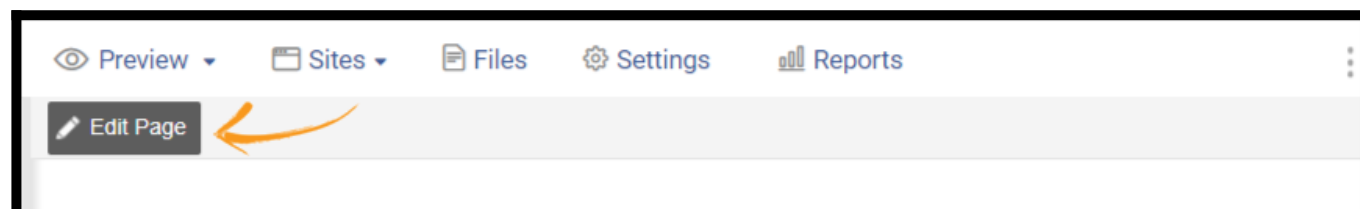




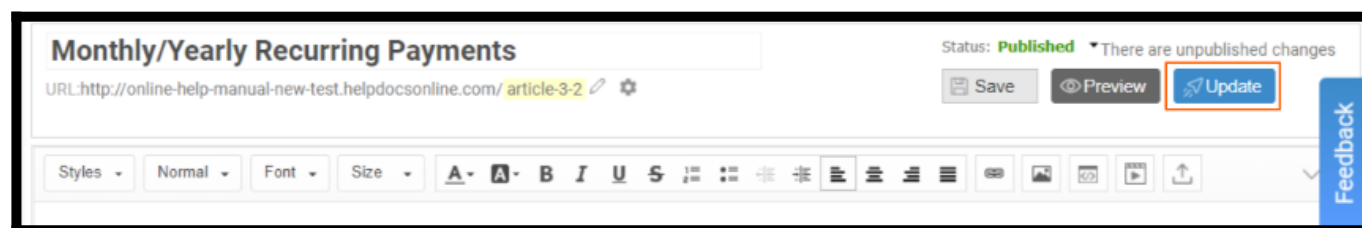
**Step 3:** In the **Settings** tab, select **Yes** in front of the “**Show pop-up to notify users when updating or publishing articles**” and click **Save**.



**Step 4:** In the knowledgebase editor, click the **Edit page**.



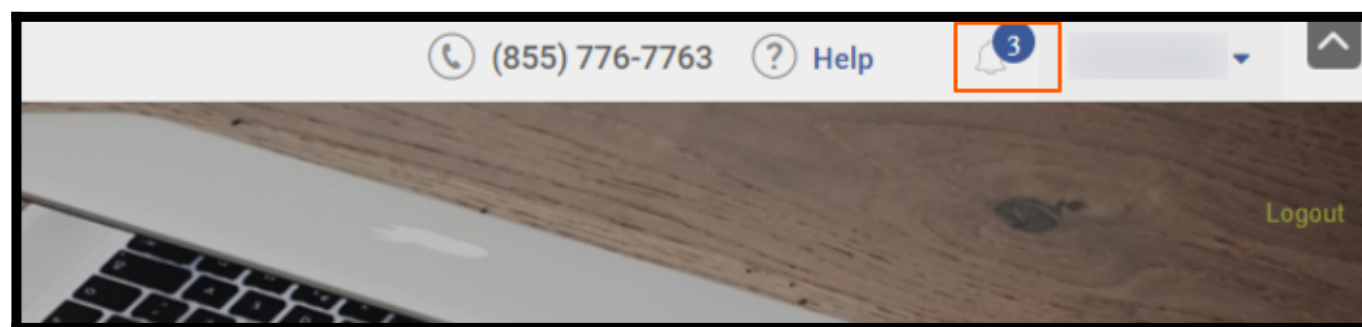
**Step 5:** Make changes to the content and click **Update**.



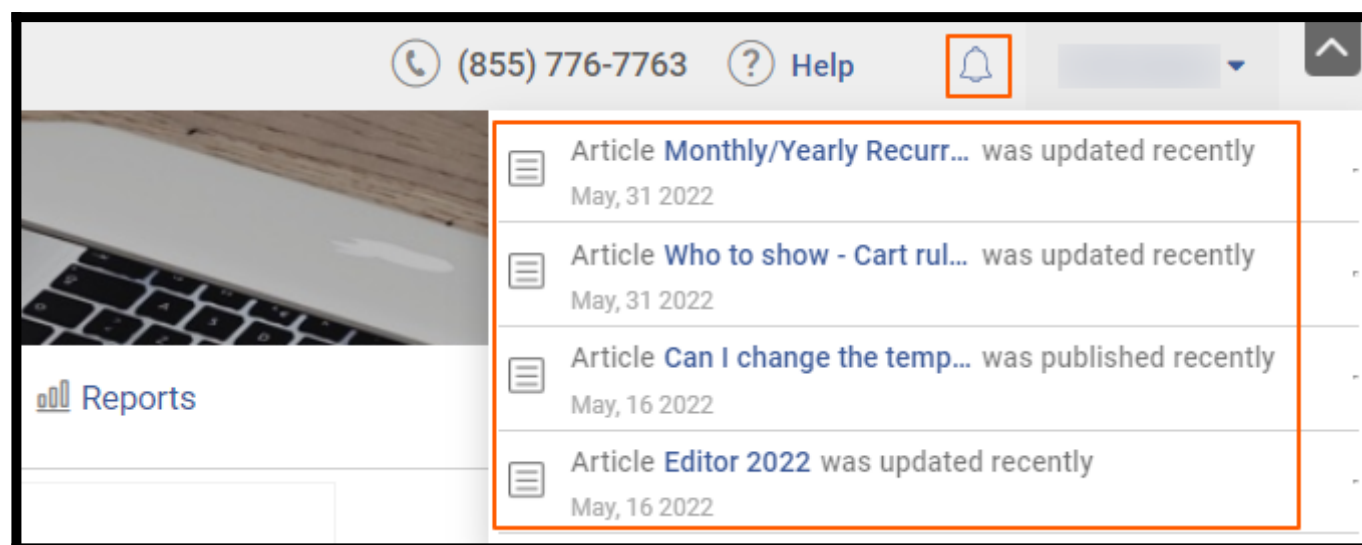
**Step 6: Select Yes.**



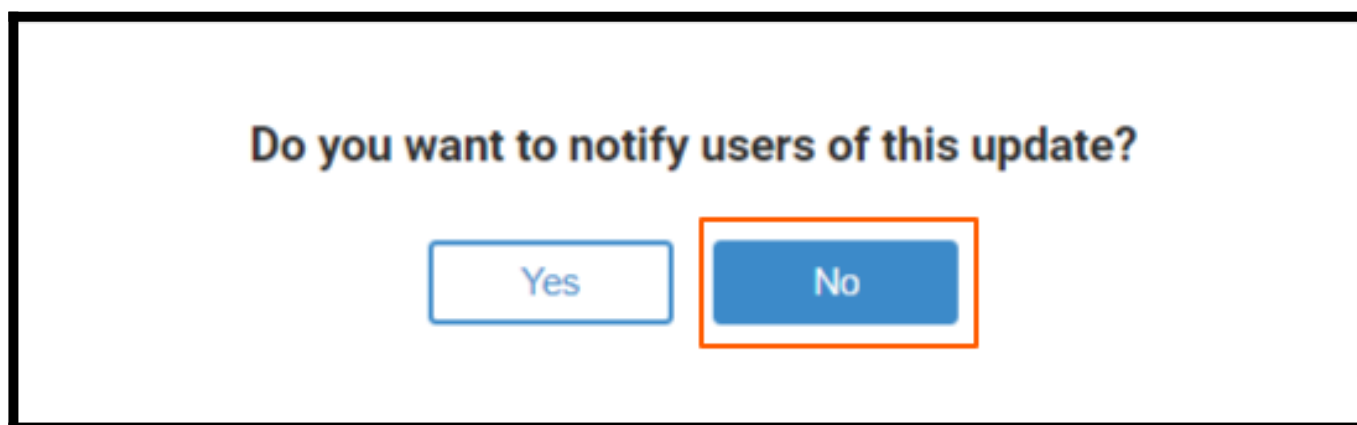
You will see a **bubble** on the **bell notification icon** with a **number**, highlighting the **number of unseen notifications**.



**Click on it to view the notifications.**



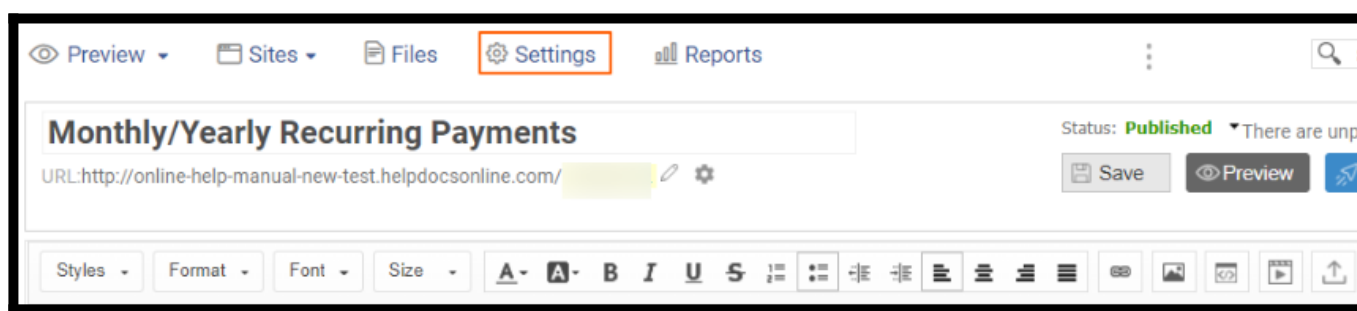
**To skip the notification alert, select NO when you click on Update.**



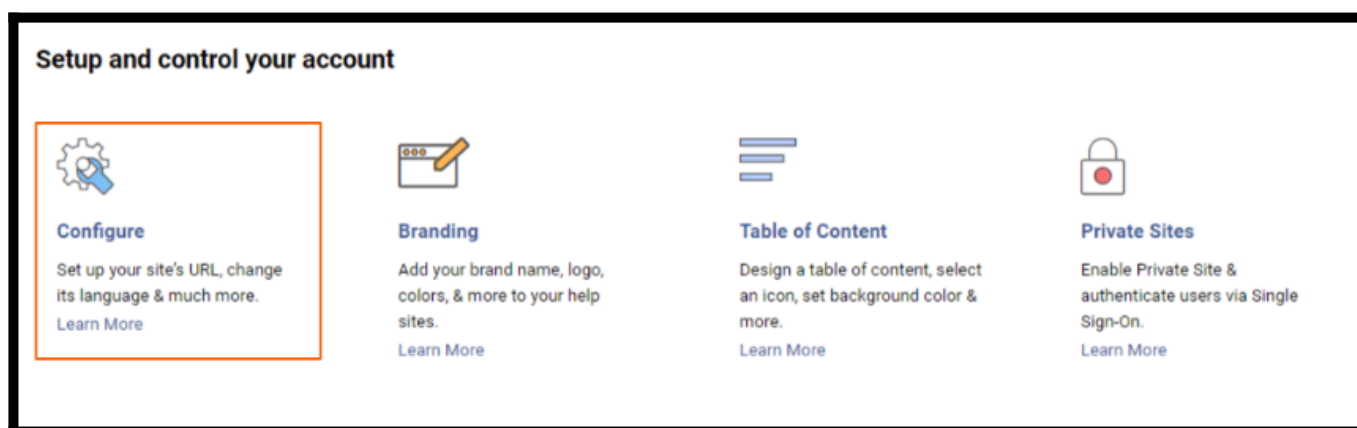
### To disable notification alerts:

In the Knowledge Base editor,

**Step 1:** Click **Settings** in the navigation menu.



**Step 2:** Select **Configure**.



**Step 3:** In the **Settings** tab, select **No** in the "Show pop-up to notify users when updating or publishing articles" option and click **Save**.

**Setup Site** ← back to settings

Manage and customize your sites, including colors, site URL, start page, etc [Learn More](#)

**Settings** Mobile SEO Search

Language: English - (United States) ?

☐ Site is another language of an existing site

Address: https:// online-help-manual-new .helpdocsonline.com

or Setup your own domain ?

Name: online-help-manual-new-test

*Opting for this option will disable the notifications for articles to be published.*

*That is all about notification alerts for article updates in the ProProfs Knowledge Base.*

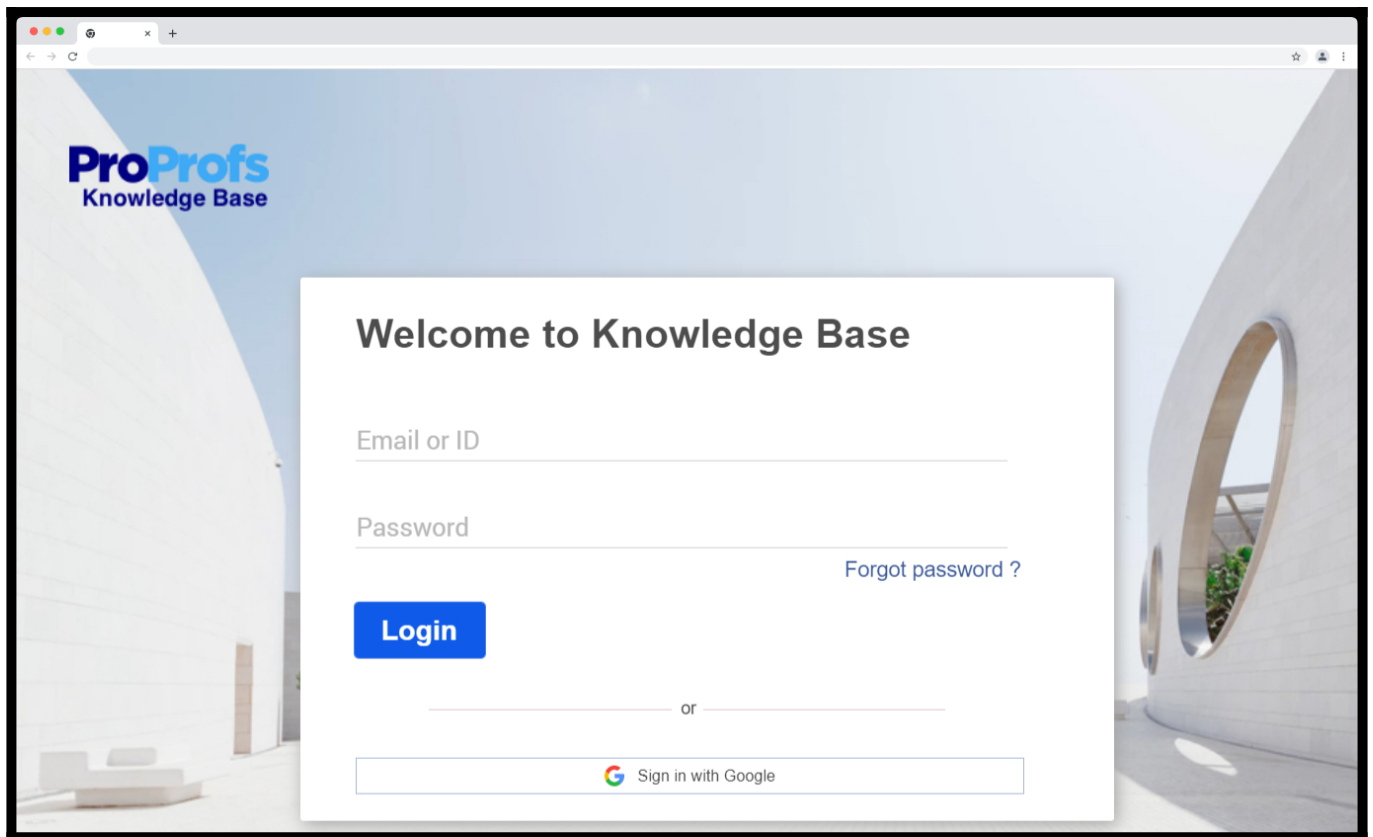
### Related Articles:

- [How to Set up a Custom Domain](#)
- [How to View and Manage My Account](#)
- [How to Redirect the URLs of KnowledgeBase Pages](#)

# How to Set Up Custom Login Page

ProProfs Knowledge Base allows users to set up their login page with customizing and branding options. With this, the users can upload a personalized logo & background image, change the title, edit button color & text, and set multiple login options to enhance the appearance of the login page.

Here is how your custom login page will appear on your Knowledge Base:



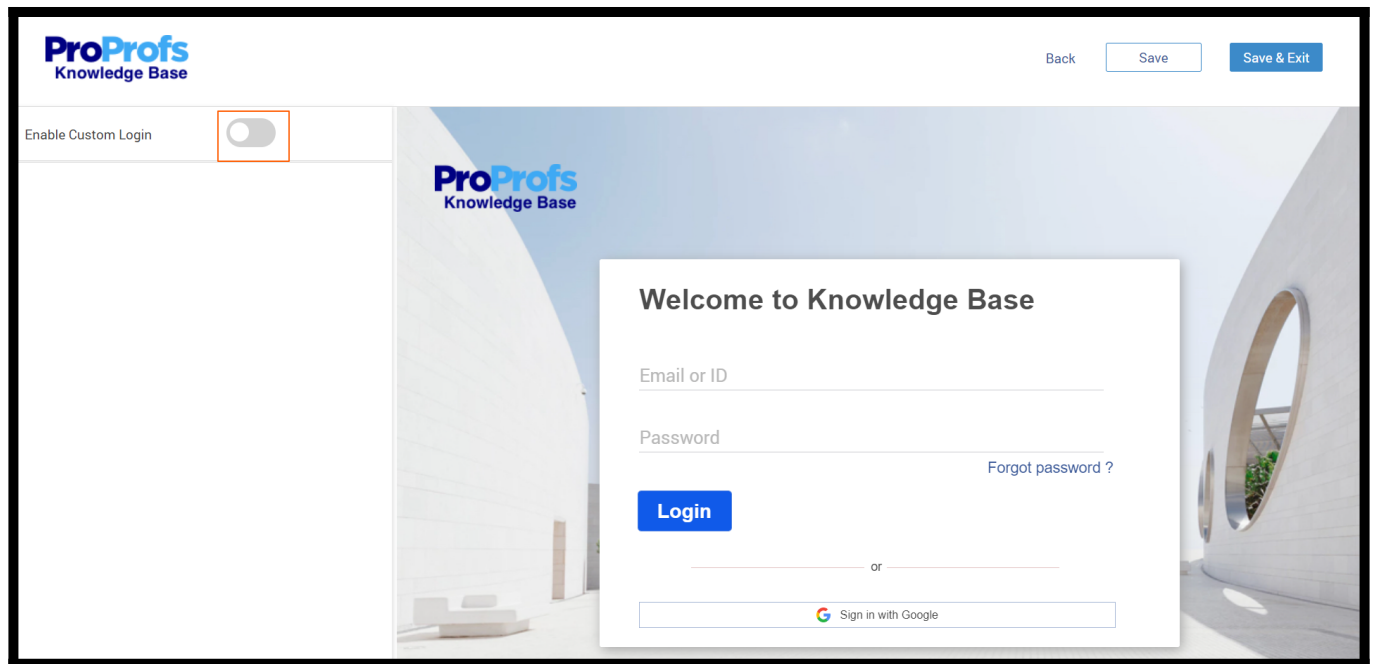
## Setting your login page with customization options:

- Makes your login page appear more user-friendly and professional.
- Authenticates the user accessing your Knowledge Base.
- Retrieve the password in case the user forgets it.

## How to Setup the Login Page

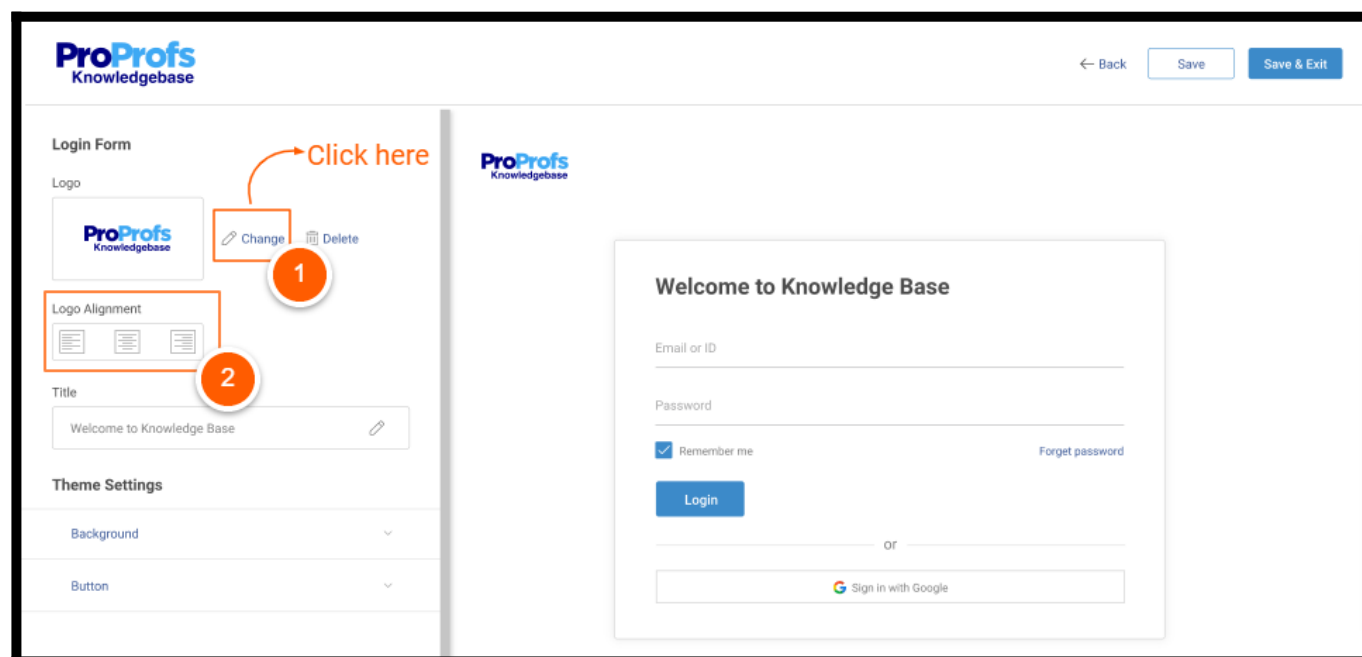
**Step 1:** In your ProProfs Knowledge Base, go to **Settings > Custom Login Page**.

**Step 2:** **Enable Custom Login** using the toggle button.



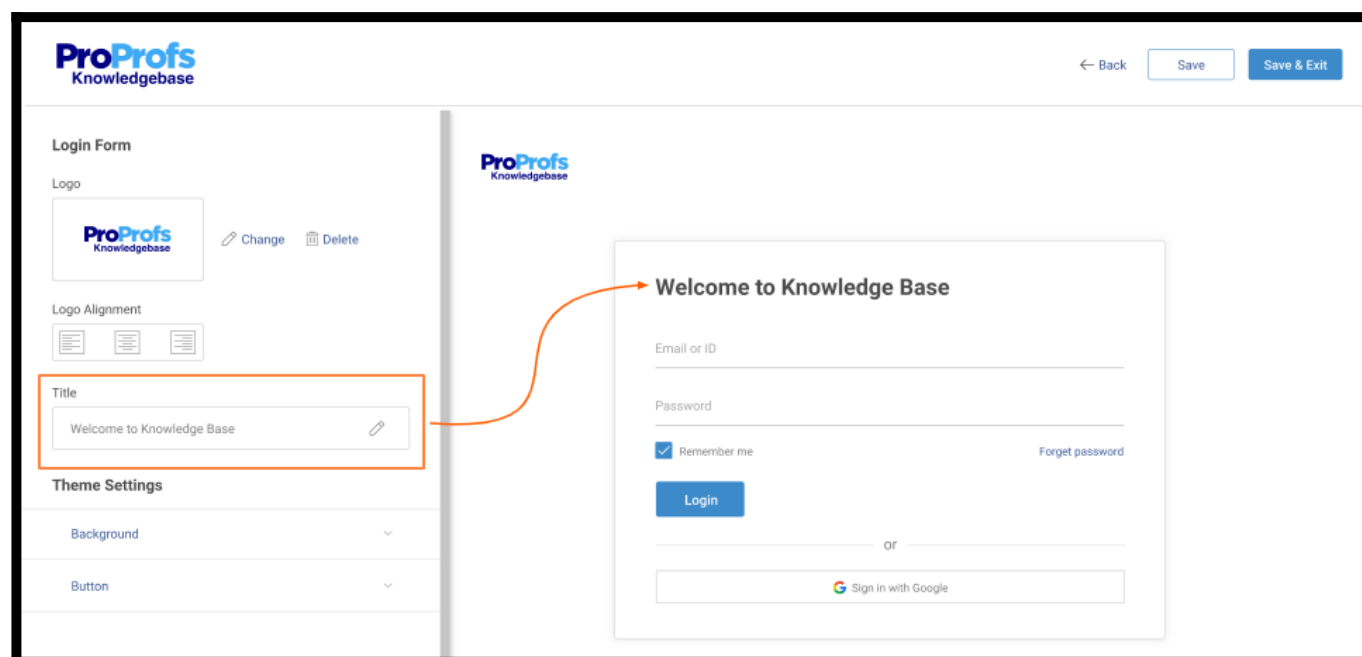
### Step 3: To Change the logo

- Click **"Change"** and upload the image.
- Select the **Logo Alignment**.



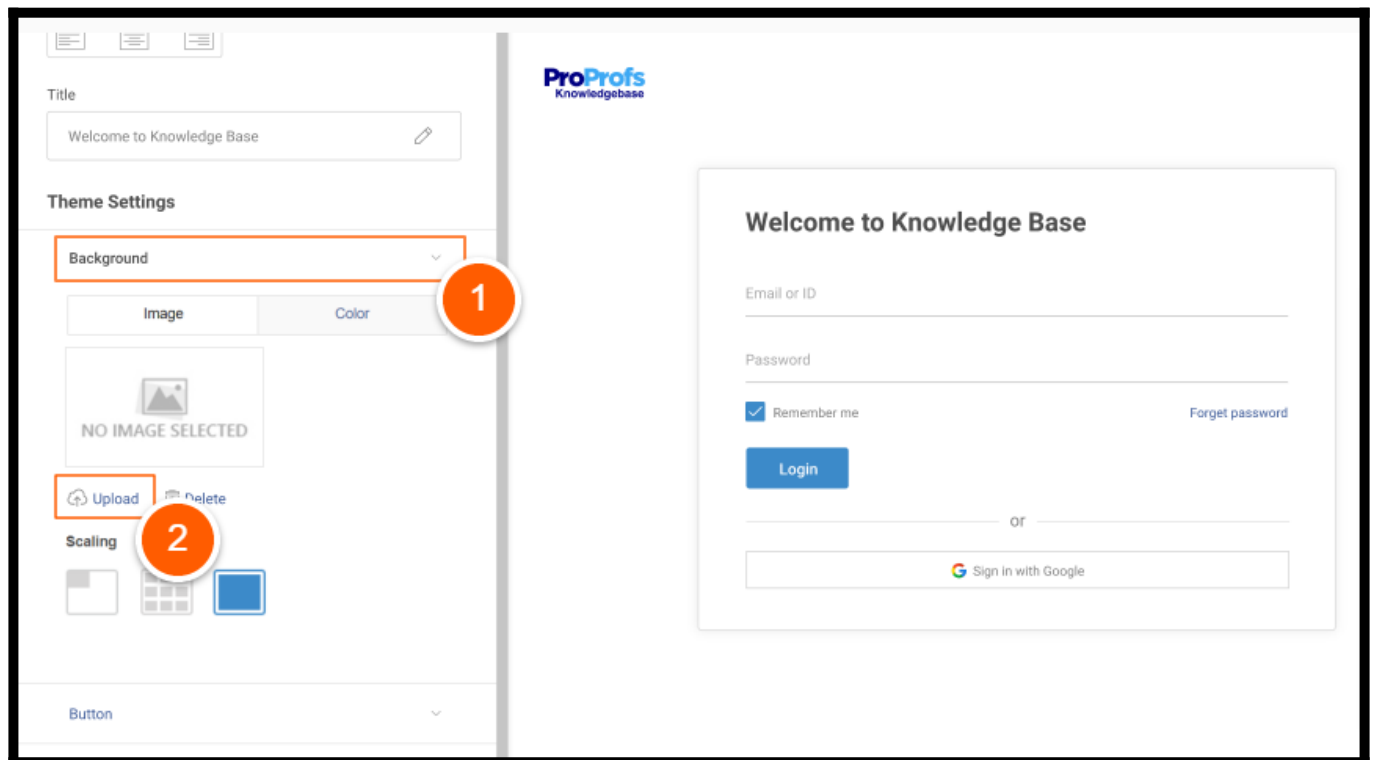
**Step 4:** To change the **title** of the Login Page,

- Click the text box under **Title**.



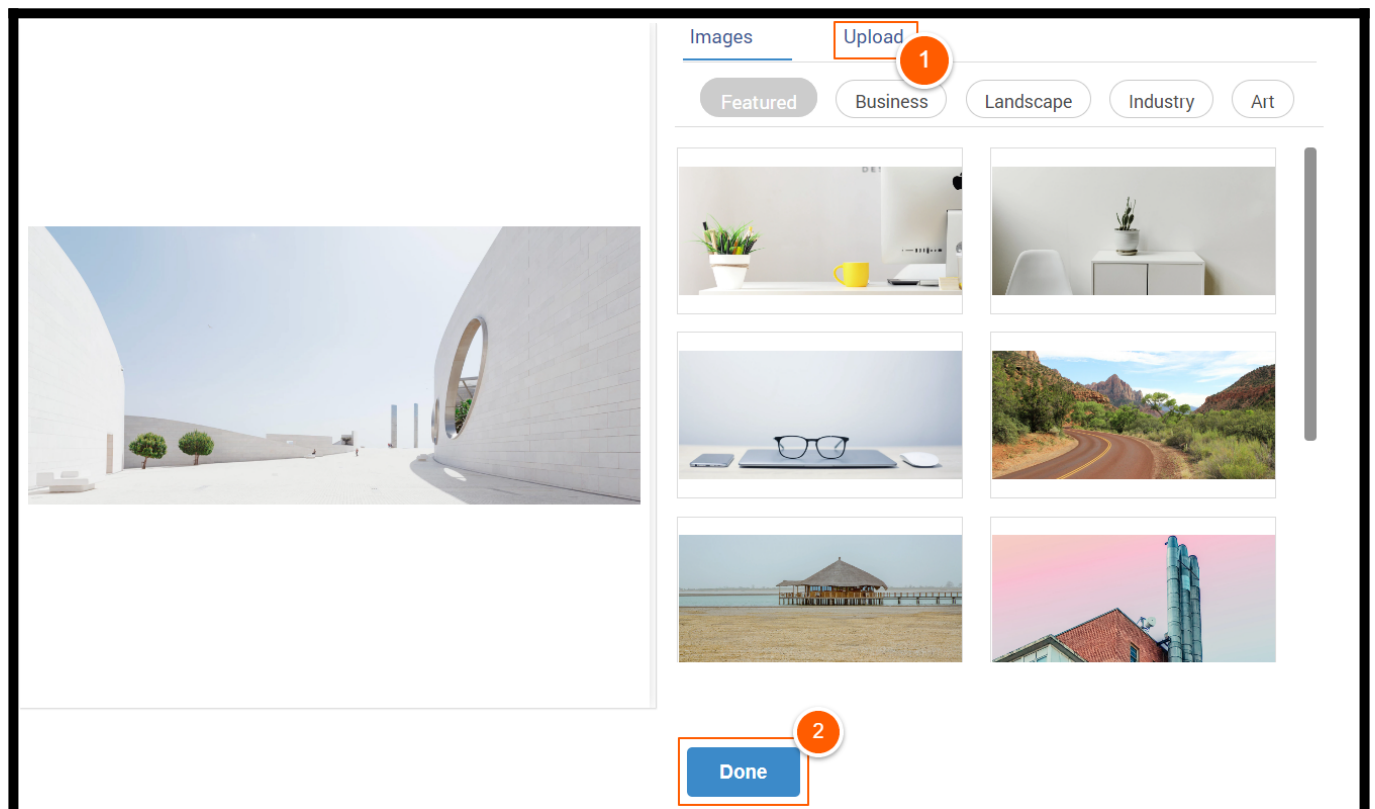
**Step 5:** To change the **Background**

- Navigate to **Background > Upload** under **Theme Settings**.



**NOTE:** You can also use the Color option if you want a solid background on your login page.

**Step 6:** Switch to the **Upload** tab, select the image and click **Done**.





**Step 7:** Select the **scaling** for the login screen.

**Step 8:** To customize the **Action Button**

- Navigate to **Background** under **Theme Settings**.
- Select the **Button Color**.
- Select the **Text Color**.
- Change the **Login Button Text**.

The screenshot shows the 'Login Form' customization interface. On the left, the 'Theme Settings' panel is open, and the 'Button' option is selected. Below it, the 'Button Color' is set to #3c8ac9, 'Text Color' is #ffffff, and 'Login Button Text' is 'Login'. The main preview area shows a 'Welcome to Knowledge Base' login form with fields for 'Email or ID' and 'Password', a 'Remember me' checkbox, a 'Forgot password' link, a 'Login' button, and a 'Sign in with Google' button.

**Step 9:** Click **Save** to apply the changes.

The screenshot shows the 'Login Form' customization interface with the 'Save' button highlighted in the top right corner. The left sidebar shows 'Theme Settings' with 'Button' selected. The main preview area shows a 'Welcome to Knowledge Base' login form with fields for 'Email or ID' and 'Password', a 'Remember me' checkbox, a 'Forgot password ?' link, a 'Login' button, and a 'Sign in with Google' button.

*That is all about setting up your custom login page in ProProfs Knowledge Base.*

# How to Set up a Custom Domain

By default, your help site will run on a URL like site.helpdocsonline.com.

- [Step 1 - How to Set Up the CNAME Record](#)
- [Step 2 - Set Up the Domain in ProProfs](#)
- [Troubleshooting](#)
- [Using SSL \(https\)](#)
- [Remove a Custom Domain](#)

## Step 1 - How to Set Up the CNAME Record

The first thing you will need to do is set up the CNAME record for the domain name you want to use. You add the CNAME with the DNS host you purchased the domain name through. For example, if you bought the domain name from Go Daddy, you will need to log in to your Go Daddy account. The company that manages your DNS is often different than the company that hosts your website. You may even need to ask the DNS host to add the CNAME record for you.

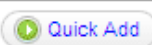
Here is a quick example of how to add a CNAME to a Go Daddy account.

- Log in to your Go Daddy account, locate the domain name you want to use, and select the **DNS manager**.
- Then locate the CNAME (Alias) table, and click **Quick Add**.

In the screenshot below you can see how a CNAME record gets added for the domain youremailco.com.

youremailco.com (Last saved 09/02/2011 10:04:23 AM MST) [Cancel](#) **Save Zone File**

<input type="checkbox"/>	pda	mobilemail-v01.prod.mesa1.secureserver.net	1 Hour
<input type="checkbox"/>	pop	pop.secureserver.net	1 Hour
<input type="checkbox"/>	smtp	smtp.secureserver.net	1 Hour
<input type="checkbox"/>	webmail	webmail.secureserver.net	1 Hour
<input type="checkbox"/>	www	@	1 Hour
<input type="checkbox"/>	help	emailmarketingco.helpdocsonline.com	1 Hour



The screenshot shows a DNS management interface for the domain 'youremailco.com'. It displays a table of existing records: pda, pop, smtp, webmail, and www. A new record is being added for 'help', pointing to 'emailmarketingco.helpdocsonline.com' with a TTL of 1 hour. Red arrows highlight the 'help' field, the target value, and the 'Quick Add' button at the bottom left. The interface includes 'Cancel' and 'Save Zone File' buttons at the top right.

- For the **Host name** enter the custom sub-domain you want to use. For example "help" will be help.youremailco.com
- The **Points to** must be the URL of your .helpdocsonline.com site. For example, if your site's ProProfs URL is http://site.helpdocsonline.com you would enter site.helpdocsonline.com (do not add "www." or "http://").
- For **TTL** (time to live) select **1 Hour**.
- Click **Save Zone File**.

**Note: Changes usually take 1 hour. However, it may take up to 48 hours for these changes to take effect.**

## Step 2 - Set Up the Domain in ProProfs

Once you have your CNAME set up, and you have waited for the update to propagate, you can set up the custom domain in ProProfs.

1. Log in to your account (as an administrator), and click **Settings > Configure & Brand**.
2. Select the site you want to set up the custom domain for.
3. Click **Set up your own domain**.

### Setup Site << back to admin

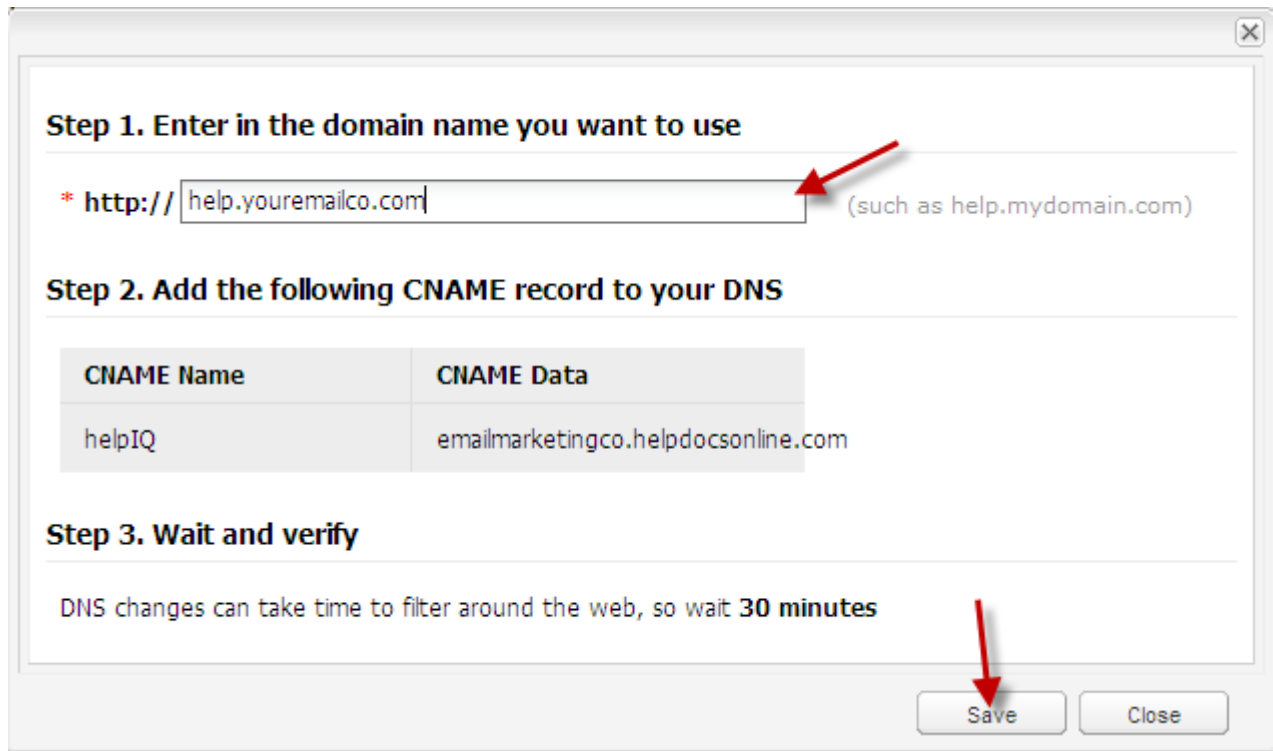
Set up your HelpDocs Site

\* **Site Name**   
The name of this help docs site. Appears on the web browser title

**Start Page**

\* **Site Address**   
or [Setup your own domain](#)

4. An overlay will appear. In the overlay, type in the name of the **custom domain** you set up in Step 1. For example, help.mydomain.com.



The screenshot shows a dialog box titled "Advanced Settings" with a close button (X) in the top right corner. It contains three steps for domain configuration:

- Step 1. Enter in the domain name you want to use**  
A text input field contains "http:// help.youremailco.com". A red arrow points to the end of the text in the field. To the right of the field is the text "(such as help.mydomain.com)".
- Step 2. Add the following CNAME record to your DNS**  
A table with two columns: "CNAME Name" and "CNAME Data".

CNAME Name	CNAME Data
helpIQ	emailmarketingco.helpdocsonline.com
- Step 3. Wait and verify**  
Text: "DNS changes can take time to filter around the web, so wait **30 minutes**".

At the bottom right, there are two buttons: "Save" and "Close". A red arrow points to the "Save" button.

5. Click **Save**.

Once **Save** is clicked, ProProfs will immediately verify the CNAME. If the CNAME record is not updated yet or is not set up correctly, you will see an error. If this happens, just wait a bit longer and try again.

## Troubleshooting

If after a few days you are still not able to set up a custom domain, there is probably an issue with the way the DNS CNAME is set up. The first step is to troubleshoot the DNS record. You can use a third-party tool such as [www.intodns.com](http://www.intodns.com) to check the CNAME record to see whether it is correct.

If the record does not look correct, you will need to contact your DNS host to help you. If everything looks okay, then please contact our support team at [support@ProProfs.com](mailto:support@ProProfs.com).

## Using SSL (https://)

Once you setup your custom domain name SSL (https://) will no longer work. The reason is because the SSL certificate is granted to \*.helpdocsonline.com. When you try to run SSL on your domain such as https://help.url.com there will be a security error. To resolve this we can install a custom SSL certificate for your domain name.

If you plan on having multiple ProProfs sites then you will need to purchase a [wildcard](#)

### SSL. Our server type is Apache + Open SSL.

The process of setting up a SSL:


1. You will need to set up a custom domain as defined above.
2. Next step is sent us given files - Key file, Certificate file, required chain files.
3. Make sure key file should not bigger than 2048 bit
4. You can use wildcard files(\*.yourdomain.com) in case of multiple subdomains.
5. Send these files to us. We will enable SSL for you.

SSL utilizes SNI and is not compatible with Internet Explorer (versions 6, 7 , 8 , 9) on Windows XP. [Read more](#)


This feature is only available for 'Business' and 'Enterprise' users.

### Remove a Custom Domain

1. Log in to your account (as an administrator), and click **Settings > Configure & Brand**.
2. Select the site you want to set up the custom domain for.
3. Next to the Site Address click **Remove this Domain**.

\* **Site Language**  

☐ Site is another language of an existing site

\* **Site Address**  [Remove this Domain](#) 

\* **Site Name**

4. Click **Save**.

#### Related Articles:

[Add and Customize a Site](#)  
[Duplicate/Clone a Site](#)  
[Multiple-Site Search](#)

# White Label

Our white label service ensures your users can view your knowledgebase on your website (under your brand) with no indication of the knowledge base being powered by ProProfs. With white label, your knowledgebase builds your brand and enhances the content on your website.

## What are the benefits of white label?

1. **Removal of "Powered by ProProfs"** helps in showcasing your knowledgebase as an authentic part of your website.
2. **Customize your knowledge base** by adding your brand's logo, change the font, background theme, and more.
3. **Enable SSO integration** to allow users to log into the knowledgebase seamlessly through your website

# How to Design Table of Contents

[ProProfs Knowledge Base](#) allows you to prepare a help center that is easy to navigate and minimizes visitor's time and effort. It lets you create a table of content that provides a sneak-peek into every aspect of your knowledge base in the way you want.

Designing a table of contents helps you to:

1. Organize your help center folders and pages in a better way
2. Provide a tidy outline of your knowledge base
3. Deliver a user-friendly experience

In this article, you'll learn:

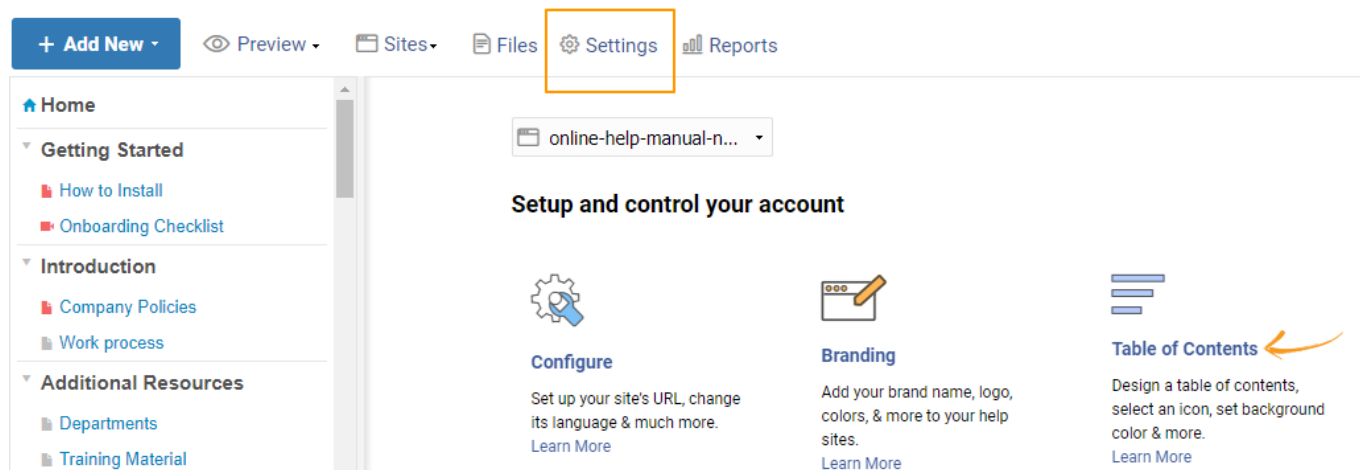
- [How to show/hide the table of contents](#)
- [How to enable Page TOC](#)
- [How to configure TOC settings](#)
- [How to enable 301 Redirect](#)
- [How to change the folder style within a page](#)

## How to Show/Hide Table of Contents

**Step 1:** In your Knowledge Base account,

- Navigate to **Settings >> Table Of Contents**
- A new page opens with different elements related to the customization of your table of contents.











**Step 2:** Follow the instructions below to customize the table of contents of your help center.


**Table of Contents**   ← back to settings

Design a table of contents, select an icon, set background color & more. [Learn More](#)

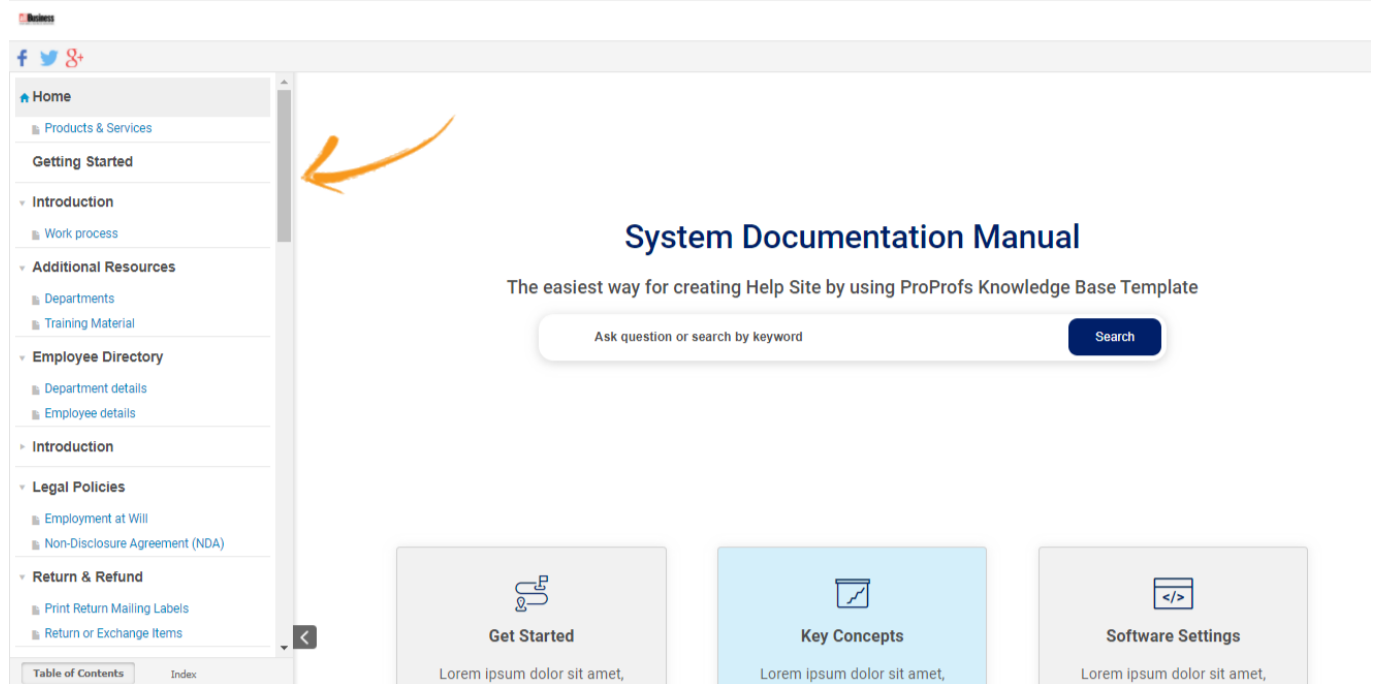
Show Table of Contents  

Page Table of Contents  

Keyword Index     [Learn More](#)

Default View    ☒ Allow users to change their own view

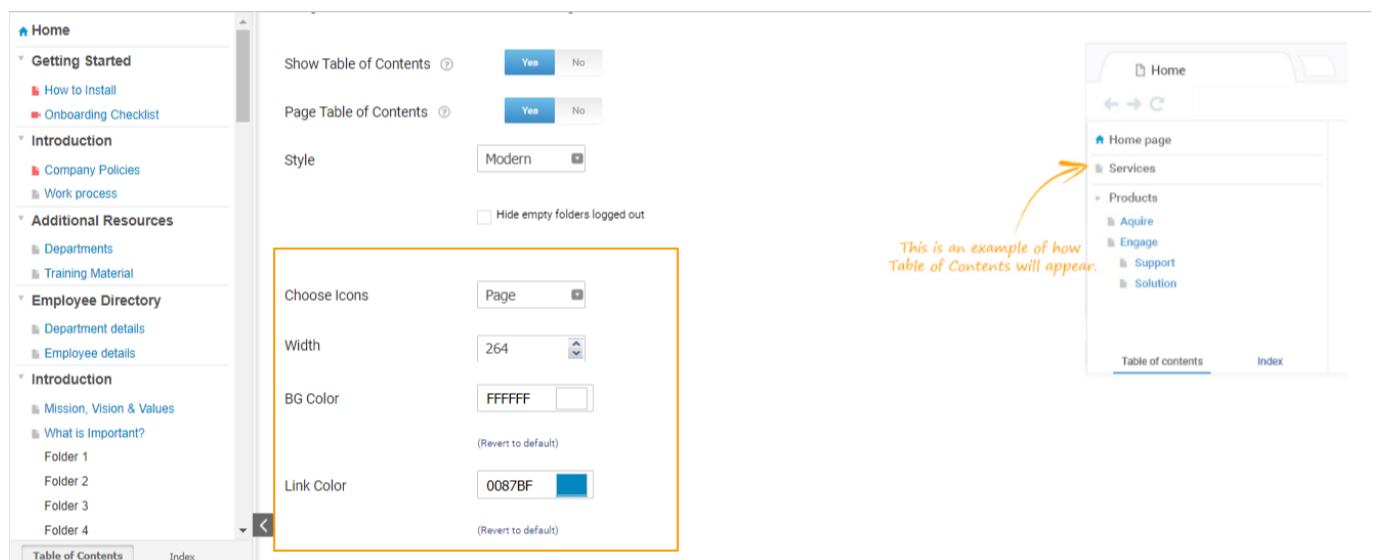
**1. Show Table of Contents:** You can choose to **show/hide** the table of contents using this option. Toggle it to **Yes**, and it will appear as shown in the left panel.



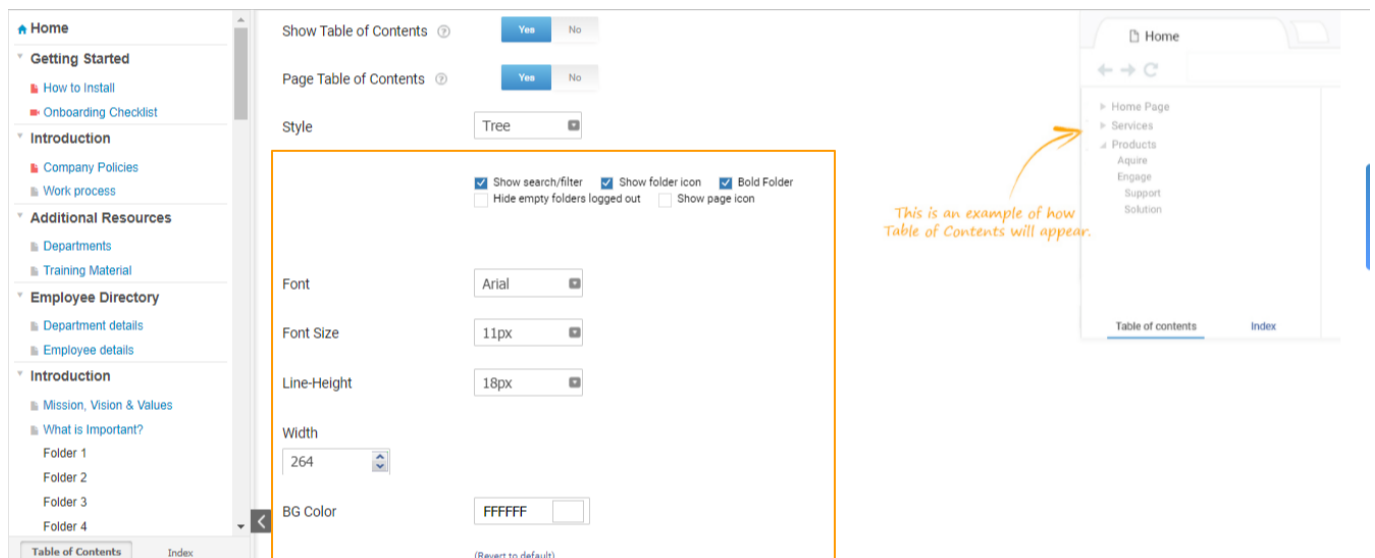
When you prefer to show the table of contents, a list of customizable options shows up to help you design it the way you want.

**a) Style:** Choose from one of the two given styles: **Modern** or **Tree**. A preview of both the structures is visible on the right side.

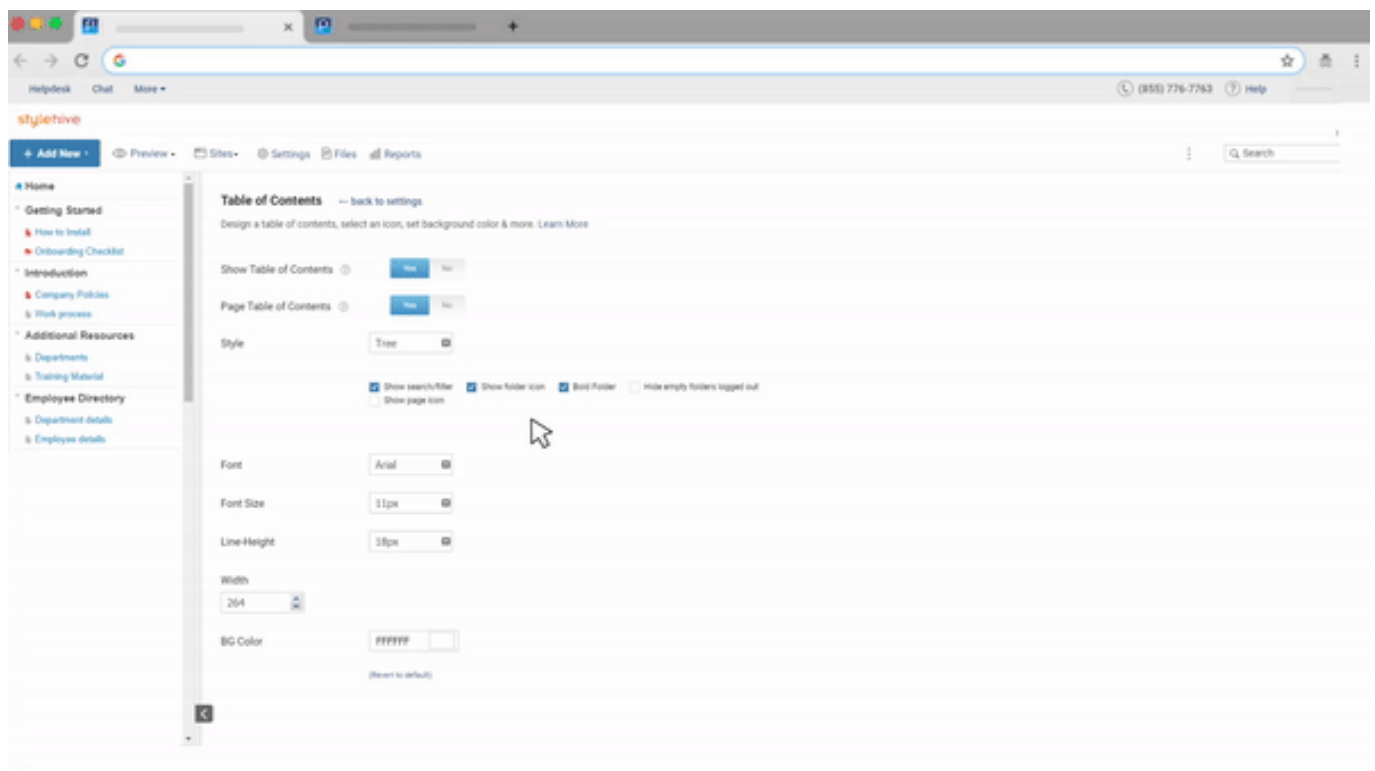
When you choose **Modern**, you will see the following customizable options.



When you choose **Tree**, you will see the below options to modify the table. Select the checkboxes you want to enable.



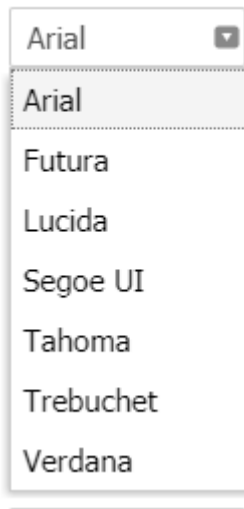
**b) Choose Icons:** You can try out different icon types to customize the table of contents. With a live preview on the left panel, you can see how each icon will look in your table of contents.



**Note:** The **Choose Icons** option works only with the 'Modern' style. If you choose 'Tree,' you won't be able to select an icon type.

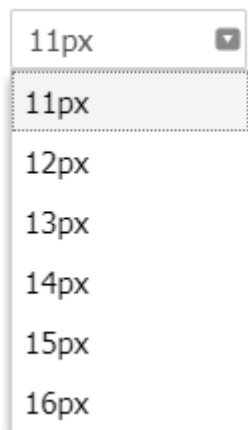
**c) Font\*:** You can choose a font type from the given list.

#### Font



**d) Font Size\*:** Pick a font size of your choice.

#### Font Size



**e) Line-Height\*:** You can increase or decrease the distance between two lines.

#### Line-Height

18px

18px

19px

20px

21px

22px

23px

24px

25px

26px

*\*Available in the tree style.*

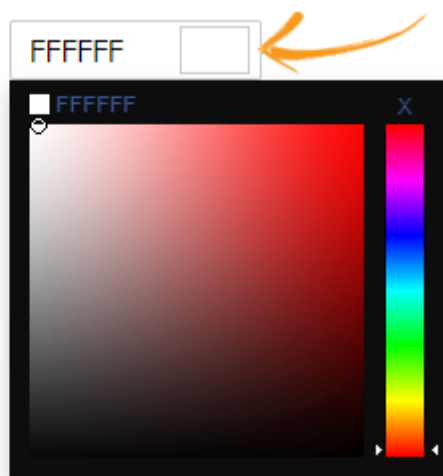
**f) Width:** You can adjust the width of the table of contents panel in pixels.

#### Width

264

**g) Background Color:** You can change the panel's background color to match your website's theme. You can use the '**Revert to default**' option to reset the changes.

#### BG Color



#### Keyword Index ?

#### Default View

**h) Link Color:** You can change the color of page titles appearing in the left panel to enhance viewability. Use '**Revert to default**' to restore the original color, i.e., blue.

BG Color

(Revert to default)

Link Color

(Revert to default)

**Note:** The option to modify link color comes with 'Modern' Style. When you choose 'Tree,' you won't see this option.

## How to Enable Page TOC

**2. Page Table of Contents:** Toggle it to **Yes** to display the table of contents in an article.

### Table of Contents [← back to settings](#)

Design a table of contents, select an icon, set background color & more. [Learn More](#)

Show Table of Contents



1

Yes No

Page Table of Contents



2

Yes No

Keyword Index



3

Yes No

[Learn More](#)

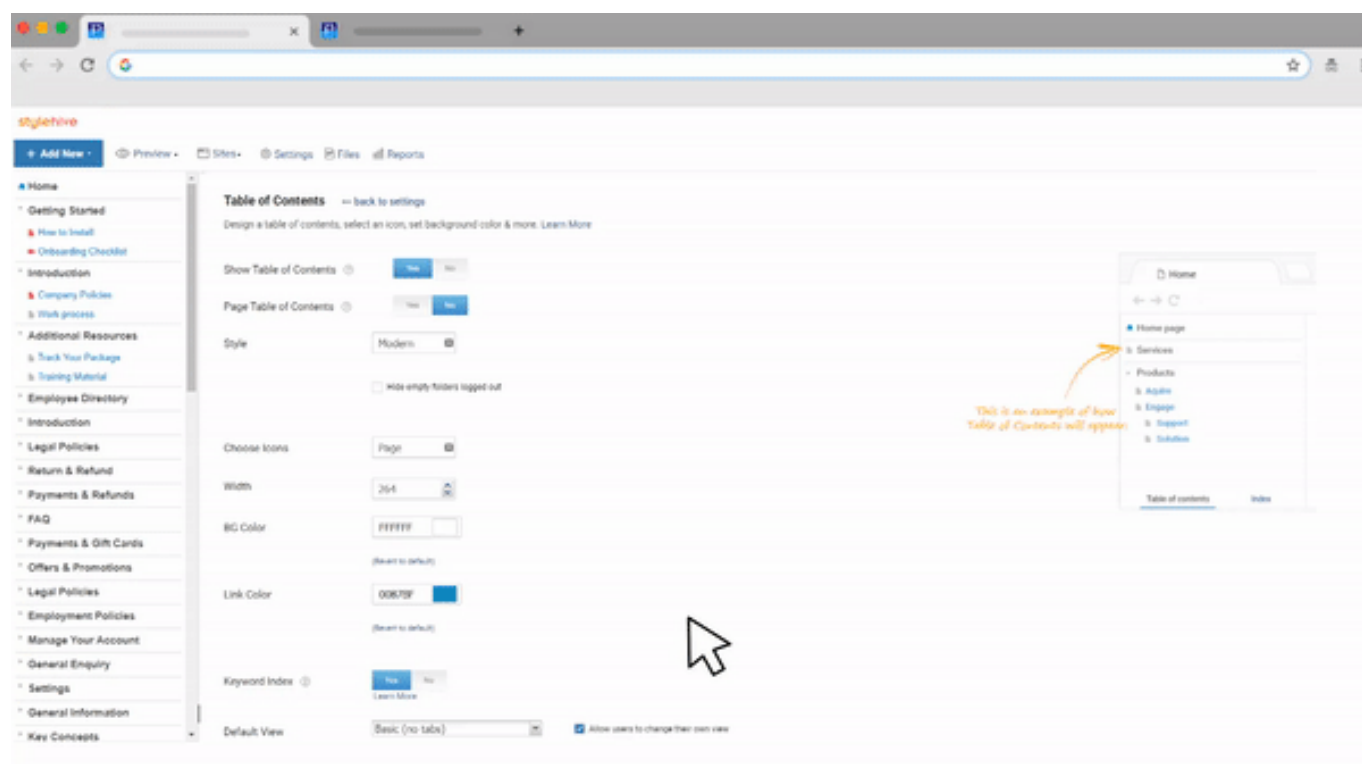
Default View

4

Basic (no tabs) ▼

☒ Allow users to change their own view

Text with **H2** and **smaller tags** will show up on the page, as shown below.



## How to Configure TOC Settings

**3. Keyword Index:** You can show or hide the keyword index tab. When enabled to **Yes**, the Index tab will appear next to the Table of Contents. [Learn more](#).

**4. Default View:** The default view has two options: **Basic** and **Tabs**.

The '**basic view**' opens one page at a time, with no tabs.

The '**tabs view**' opens pages in different tabs similar to a web browser.

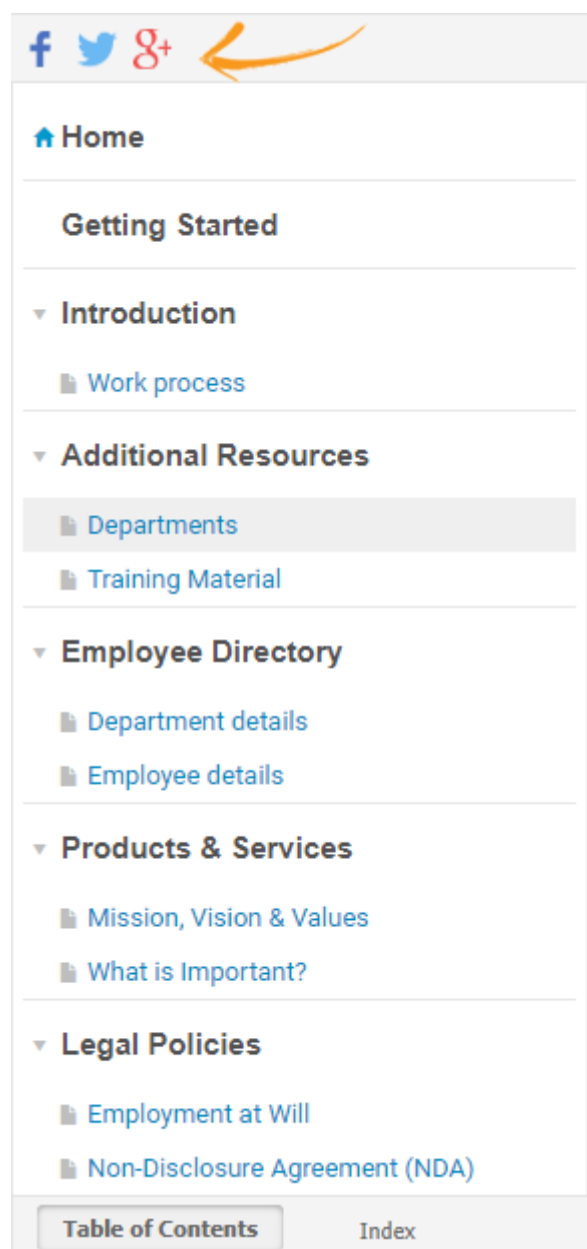
Table of Contents Contd...



---

Share	5	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
Search	6	<input type="text" value="Basic (full text)"/>
Disable Copying	7	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
Link folder to page	8	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
Folder Index	9	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
301 Redirect	10	<a href="#">Manage</a> <a href="#">Learn More</a>
Find & Replace	11	<a href="#">Manage</a>
Tag Tooltips	12	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
Folder Page style	13	<input type="text" value="Three"/>

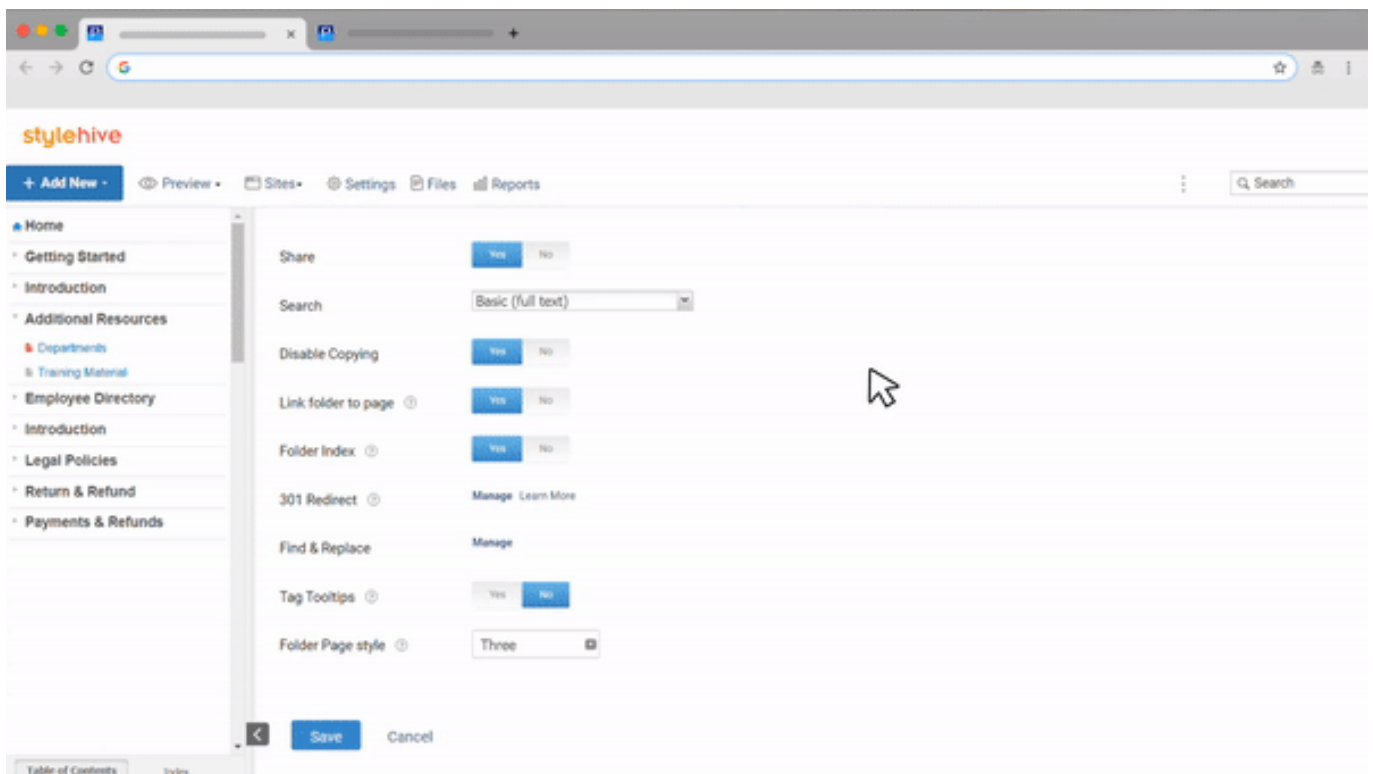
**5. Share:** You can easily share help articles on social media platforms through dedicated buttons. It lets you make help articles available for your target customers on social media.



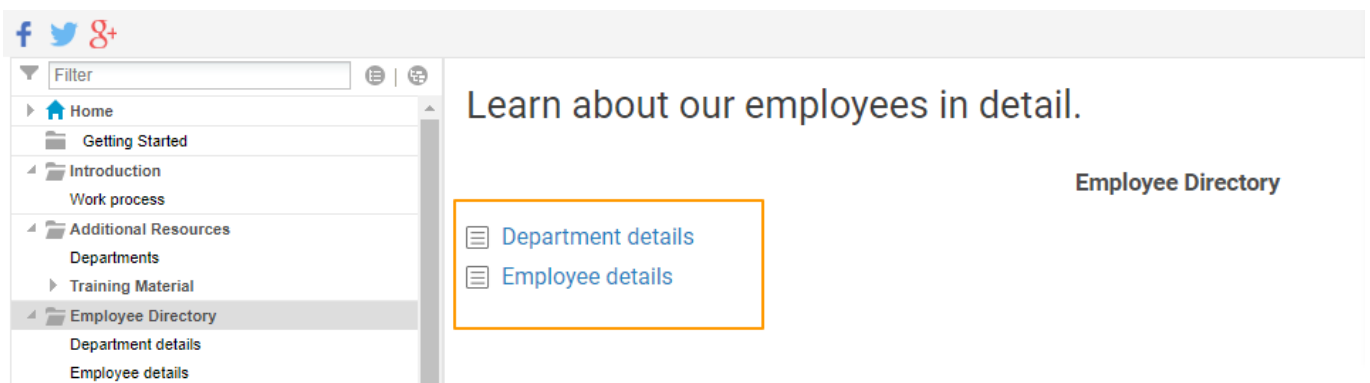
**6. Search:** You can enable one of the two search methods: **Basic** or **Exact**.

**7. Disable Copying:** You can prevent users from **copying** the content of your help articles by toggling it to **Yes**.

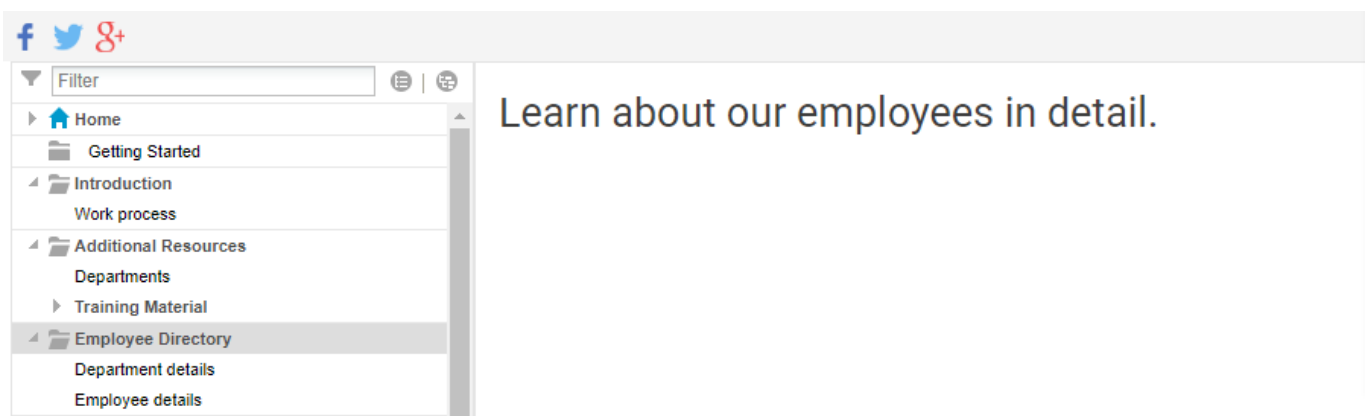
**8. Link folder to page:** You can get the unique URL address of a folder to make it linkable to a page by toggling it **ON**.



**9. Folder Index:** You can use this option to show indexing when a user accesses a particular folder. It is recommended to turn this feature off if you want to show only the relevant text on the folder page and hide the indexing from it.



**When Folder Index is enabled**

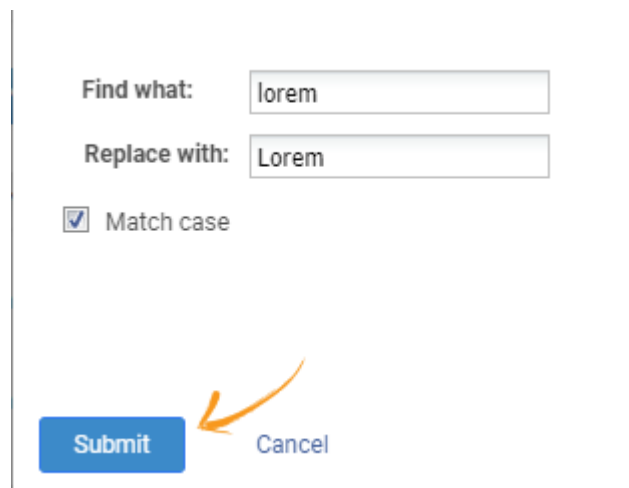


**When Folder Index is disabled**

## How to Enable 301 Redirection

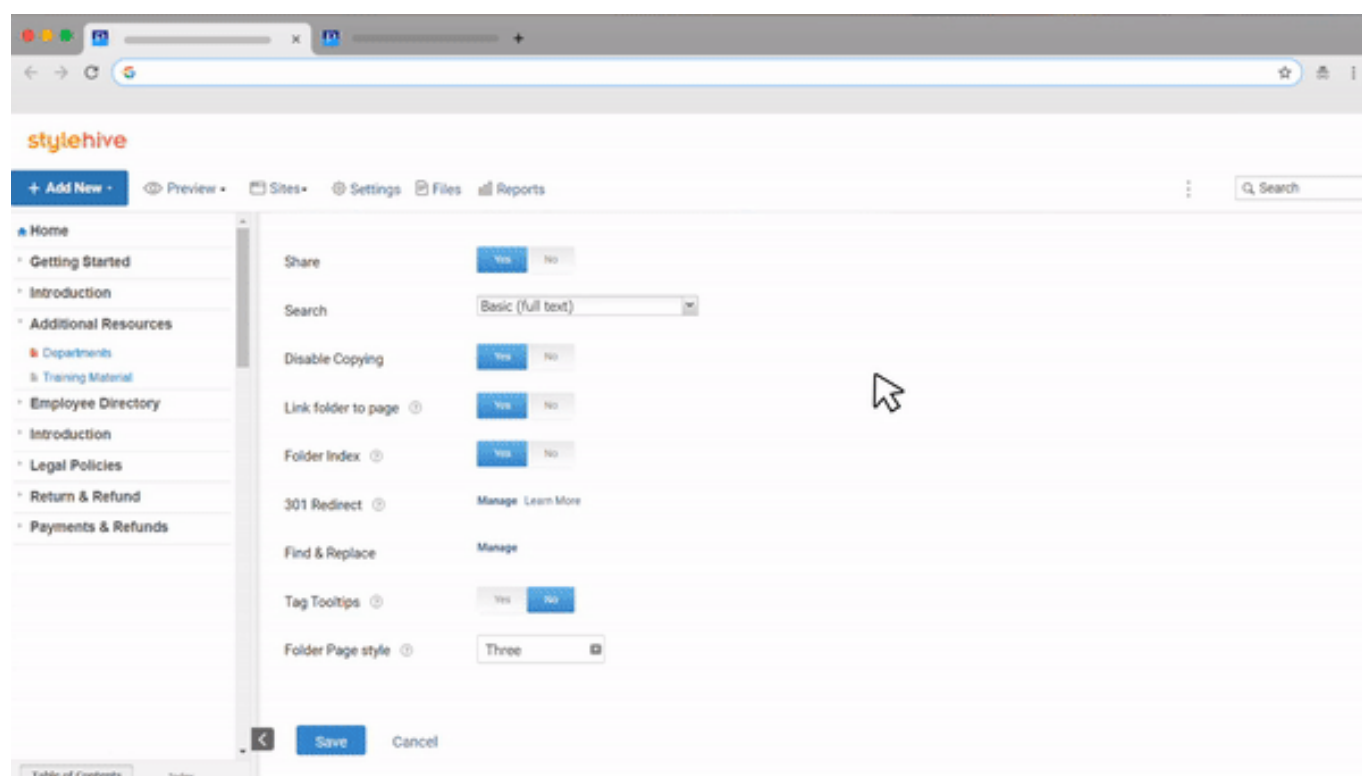
**10. 301 Redirect:** You can use this option to redirect users accessing a particular page to any other preferred page or URL. [Learn more.](#)

**11. Find & Replace:** It works similarly to the find & replace feature in **MS Word**. You can find a word and replace it with a new one. Click **Submit** to finalize your change and **Cancel** if you changed your mind.



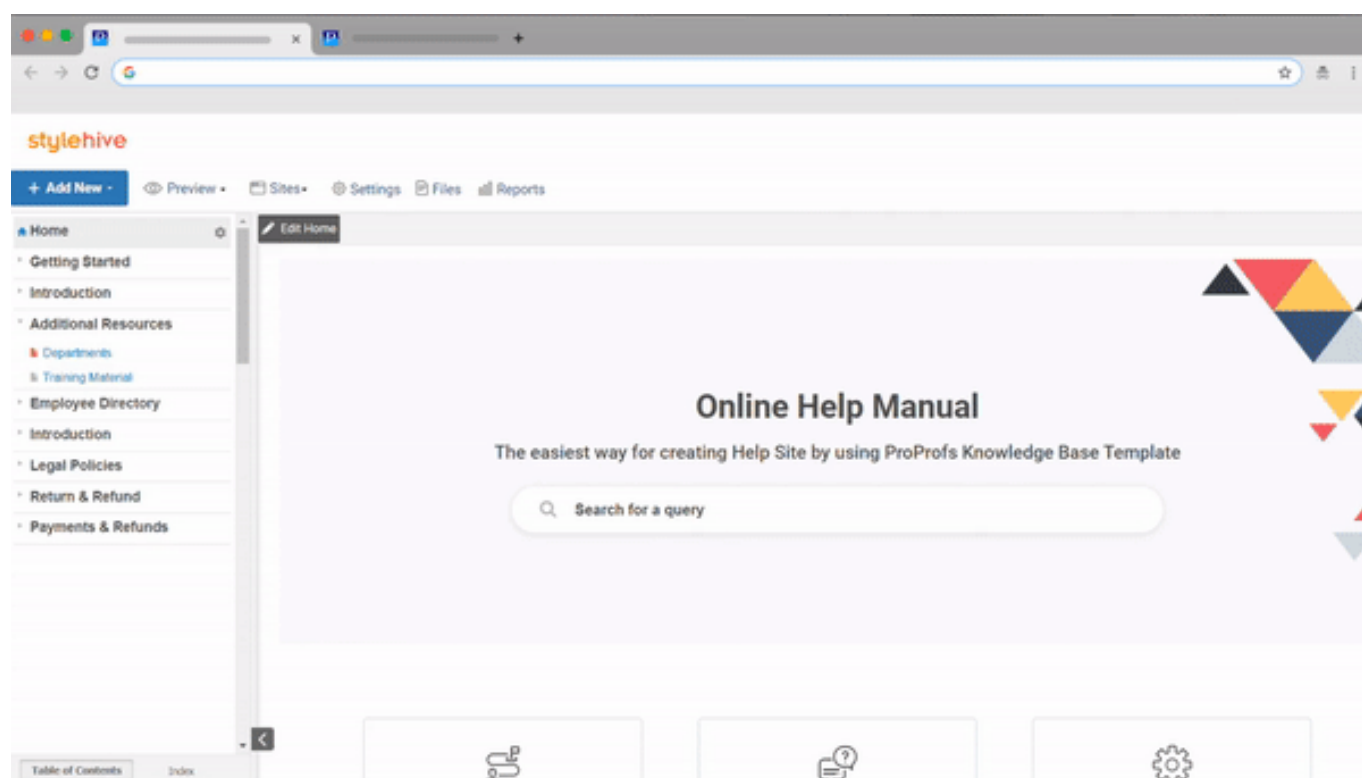
A screenshot of a 'Find & Replace' dialog box. It has two text input fields: 'Find what:' containing 'lorem' and 'Replace with:' containing 'Lorem'. Below these fields is a checkbox labeled 'Match case' which is checked. At the bottom left is a blue 'Submit' button, and at the bottom right is a blue 'Cancel' button. An orange arrow points from the 'Cancel' button towards the 'Submit' button.

**12. Tag Tooltips:** You can enable this option to offer a tooltip within an article depending upon the contained information. [Learn More.](#)



A screenshot of the Stylehive settings interface. The left sidebar shows a navigation menu with items like 'Home', 'Getting Started', 'Introduction', 'Additional Resources', 'Departments', 'Is Training Material', 'Employee Directory', 'Introduction', 'Legal Policies', 'Return & Refund', and 'Payments & Refunds'. The main content area displays various settings: 'Share' (Yes/No), 'Search' (Basic (full text) dropdown), 'Disable Copying' (Yes/No), 'Link folder to page' (Yes/No), 'Folder Index' (Yes/No), '301 Redirect' (Manage Learn More), 'Find & Replace' (Manage), 'Tag Tooltips' (Yes/No), and 'Folder Page style' (Three dropdown). At the bottom are 'Save' and 'Cancel' buttons. A mouse cursor is visible over the 'Tag Tooltips' section.

When you toggle Tag Tooltips to 'Yes.'

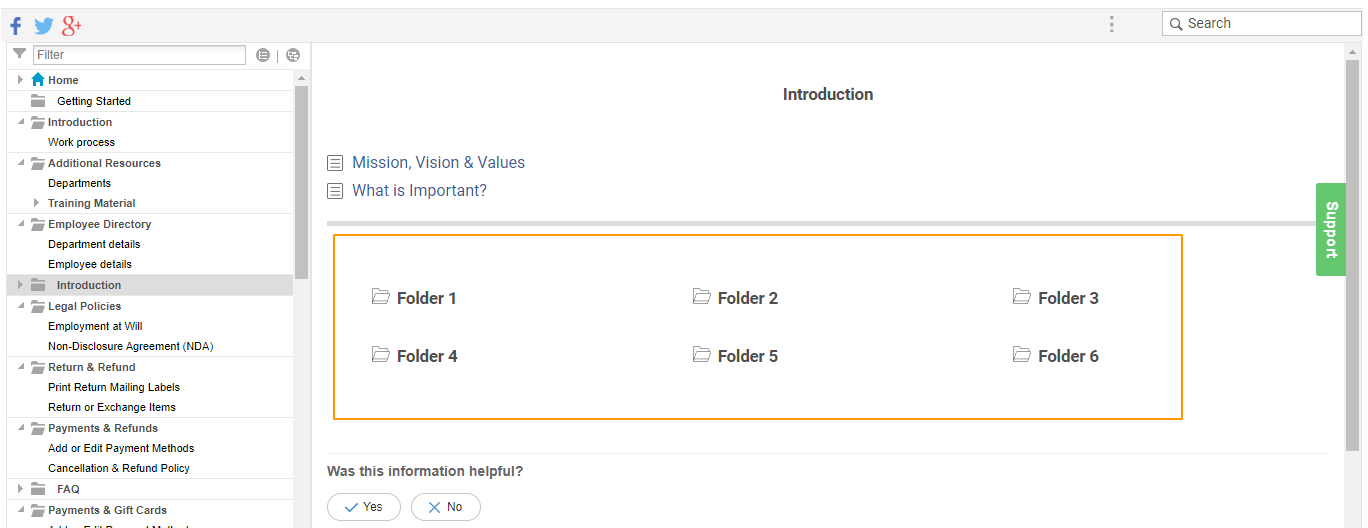


When you toggle Tag Tooltips to 'No.'

## How to Change the Folder Style Within a Page

**13. Folder Page Style:** You can use this option to divide the folders into two or three columns. Users will find the folders under a section arranged in two or three columns depending upon their number. Else, you can go with the default option, i.e., one column.

Below is how subfolders will get arranged when you choose a column of three.



*Don't forget to click 'Save' to save your changes at the end.*

### Related Articles:

- [Add and Customize a Site](#)
- [Revision History](#)
- [Folder Restrictions](#)

# How to Redirect the URLs of KnowledgeBase Pages

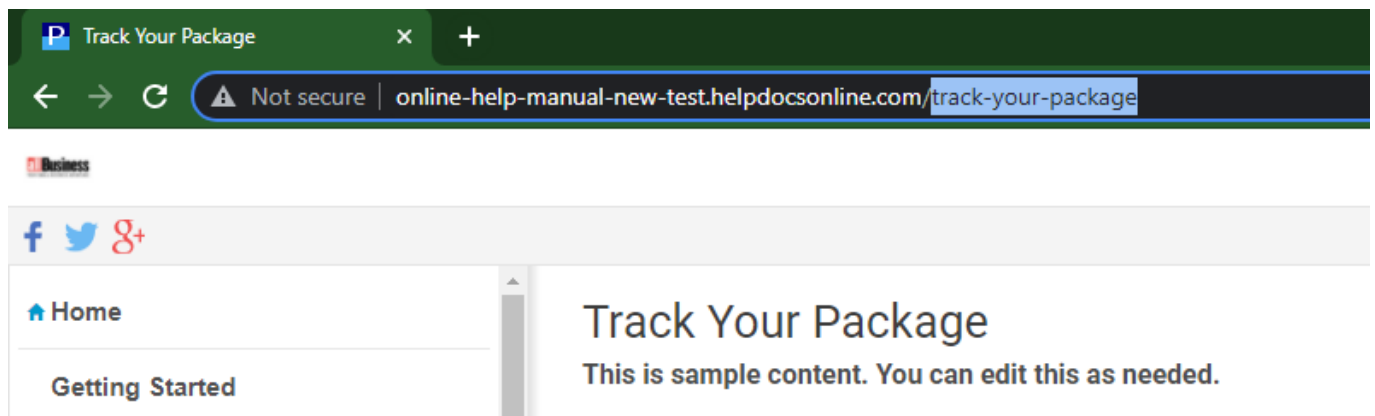
In [ProProfs Knowledge Base](#), the 301 redirect feature allows you to permanently redirect users accessing a URL to a different URL without impacting SEO.

301 redirect helps you to:

- **Forward** users accessing a page/URL to a new page/URL
- **Minimize** the impact on your SEO while redirecting users to the new URL without losing the ranking power of the former URL

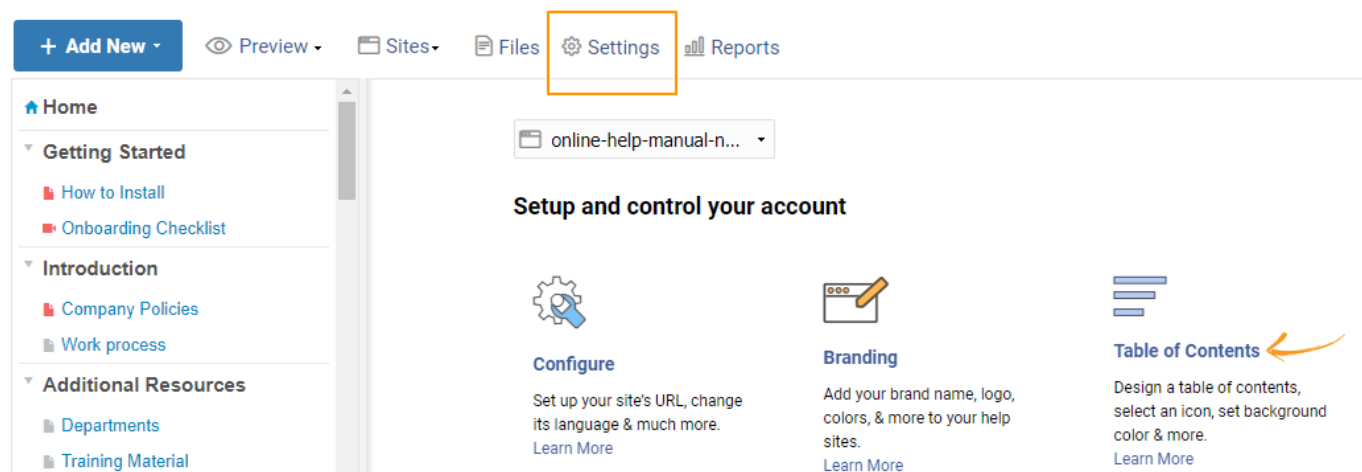
To redirect the pages of your knowledge base, you need to copy its *permalink*.

**Note:** The permalink is the latter part of a URL. For example, if the full URL is "http://online-help-manual-new-test.helpdocsonline.com/track-your-package," the permalink is "track-your-package," as shown in the image below.



**Step 1:** In your ProProfs Knowledge Base account:

- Navigate to **Settings >> Table of Contents**

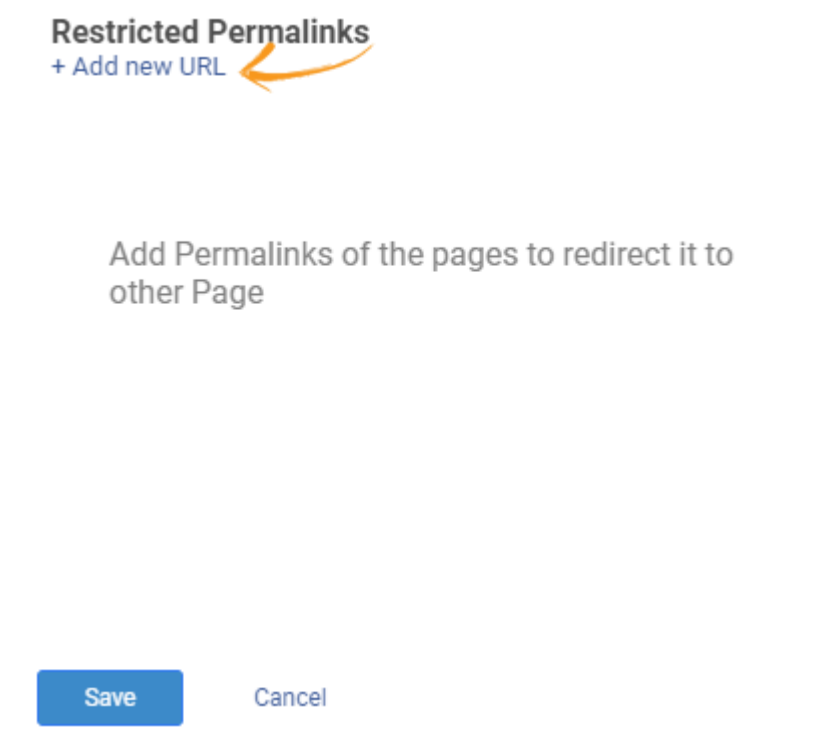


- Scroll down to locate **301 Redirect**



**Step 2:** To begin the redirection process:

- Click '**Manage.**' A pop-up window opens.
- Click '**+ Add new URL.**'





**Step 3:** You can see two boxes, as shown below.



### Restricted Permalinks

[+ Add new URL](#)

Note : Choosing the New permalink/page will redirect the current page to the new selected page



Save

Cancel

- Copy and paste the **permalink** of the page you want to redirect in the current permalink box.
- Select a **permalink** from the dropdown or copy & paste the permalink of the **destination URL**.
- Click '**Save.**'

### Restricted Permalinks

[+ Add new URL](#)

edit-cancel-order


Note : Choosing the New permalink/page will redirect the current page to the new selected page

Save

Cancel

**Step 4:** Click '**Save**' to save your changes.

301 Redirect <sup>?</sup>	<a href="#">Manage</a> <a href="#">Learn More</a>
Find & Replace	<a href="#">Manage</a>
Tag Tooltips <sup>?</sup>	<input checked="" type="button" value="Yes"/> <input type="button" value="No"/>
Folder Page style <sup>?</sup>	<input type="text" value="Three"/> <input type="button" value="v"/>

 [Cancel](#)

You can now preview the redirect by accessing the old URL, and you will automatically get redirected to the new one.

**Note:** You can click **X** to delete the redirect.

## Restricted Permalinks

+ Add new URL



edit-cancel-order

Note : Choosing the New permalink/page to the new selected page

Save

Cancel

### Related Articles:

- [White Label](#)
- [Making a Site Private](#)
- [Single Sign-On \(SSO\)](#)

# SEO Search Engine Support (Google, Bing, Yahoo)

- [What is SEO?](#)
  - [Guide to Getting Your Site Indexed](#)
    - [Step 1 - Enable SEO](#)
    - [Step 2 - Make Pages Crawlable](#)
      - [Bulk Enable SEO](#)
    - [Step 3 - Working with Sitemap](#)
    - [Step 4 - Submitting to Google and Bing](#)
    - [Step 5 - Wait for Results](#)
  - [Google Analytics](#)
  - [Frequently Asked Questions](#)
  - [Multiple Languages and SEO](#)
- 

## What is SEO?

By default, your ProProfs sites cannot be crawled by the search engines (Google, Bing, Yahoo). However, you may want your site's pages to appear in the search results of the search engines. Search Engine Optimization (SEO) is a collection of processes that focus on getting a site indexed properly on search engines "organically" or through unpaid search results. Before you get started, here are some best practices for making your site SEO friendly.

- **Make page URLs descriptive:** Search engines prefer site URLs that are readable to humans. For example, if you have a page URL *docs.mysite.com/3revision* you can see this URL makes little sense and does not help humans or search engines know what the page is about. The better URL is *docs.mysite.com/an-article-about-revision-3* which is friendly because you can figure out what the page is about.
- **Make page titles descriptive:** When you create a page in ProProfs, you will provide a page title. The page title is also used by the search engines when listing the page in the search results. A desirable title is 50-60 characters long and contains keywords about the page's content.
- **Think about your keywords:** Keywords are an integral part of SEO. If you fail to include

relevant keywords in your content, the search engines may never find it. Keywords should be used in your page title, headings (h1-h6), main body content, URLs, and image names with ALT tags.

- **Page content:** Content is king and having good content is key to getting pages to appear in the search engines.
- **Page links:** Search engines use hyperlinks to crawl your entire site. Adding links pointing to other ProProfs pages makes it easy for each engine to crawl from one page to the next. Don't worry about links to pages that you don't want the index. ProProfs will automatically remove links to pages that have SEO disabled.
- **Canonical Tag:** A canonical tag is a way of telling search engines that a specific URL represents the master copy of the page. Using the canonical tag prevents problems caused by identical or duplicate content appearing on multiple URLs. Practically speaking, the canonical tag tells search engines which version of a URL you want to appear in search results.
- **CallOut Extensions:** Callout extensions let you include additional text so you can show more detailed information about your business, products, and services. Callout extensions can be added to search network campaigns and search network campaigns that have opted into the display network.

## Guide to Getting Your Site Indexed

Once you have your content optimized and ready for search engines, follow these steps to get your site submitted to Google and Bing.

### Step 1 - Enable SEO

By default, SEO is disabled for a site which means the content is not crawlable. To enable SEO for a site follow these steps:

1. First, make sure you have a [custom domain](#) setup such as *docs.mycompany.com*. Having a custom domain is required before you can enable SEO.
2. Go to **Settings > Add, Edit and Customize a Site** then choose the site you want to enable SEO.
3. Click on the **SEO** tab.
4. Select the **Turn On SEO** checkbox. It will be disabled if your current plan is not supported, private sites is enabled, or you are not using a custom domain.
5. Once enabled, additional options will be available as shown below. Don't worry about these settings for now.

## 6. Click **Save**.

---

[Settings](#)   [Branding](#)   [Mobile](#)   [Integrations](#)   **SEO**

---

☒ **Turn On SEO**  
Make site crawlable by search engines (Google, Bing, Yahoo)

---

**Sitemap** <http://help.mysite.com/sitemap.xml>  
Your sitemap was last built on **September 05, 2014 01:40:02 pm**. [Regenerate](#)  
Sitemaps are a way to tell Google and other search engines about pages on your site. Since HelpIQ is an AJAX application, pages are not easily discoverable by search engines so the sitemap is used to share your site's structure. Search engines do not guarantee that they'll index all of your URLs.

---

**Title Template**   
Used on the browser title <title>. Available variables include {pagetitle} {sitename} {foldername} {tocname}

---

**Sitemap Updates** After any change we can automatically notify search engines (no registration is required)  
☒ **Notify Google** You can register at [Google Webmaster Tools](#) to check crawling statistics  
☒ **Notify Bing / Yahoo** You can register at [Bing Webmaster Tools](#) to check crawling statistics

---

**Webmaster** You can use the inputs below to verify your site with the different Webmaster Tools.  
Google   
[Following this guide](#) to add and verify your site with Google  
Bing/Yahoo   
[Following this guide](#) to add and verify your site with Bing

---

A description of each field:

- **Sitemap** - A sitemap is automatically generated by ProProfs and is a file listing all the pages that you want the search engines to crawl.
- **Title Template** - This option allows you to alter how your HTML titles are displayed on the search engine results.
  - You can use variables and they will automatically be merged over. The available variables are: {pagetitle}, {sitename}, {tocname} and {folder}. If nothing is set, the default will be {pagetitle} - {sitename}.
- **Site Updates** - Search engine usually only re-crawl a site every few weeks and sometimes even less. So if you are making content changes such as adding or removing pages you probably want to let the search engines know about this instead of just waiting. Select this option and ProProfs will automatically notify Google and Bing of any changes.
- **Webmaster Verification** Google and Bing provide great tools that allow you to administer and control how your site is index. Before you can use these tools, you must first verify that you are the site owner. See more about this below.

## Step 2 - Make Pages Crawlable

Now that you have enabled SEO, search engines are no longer blocked from your site. However, you will need to select which pages you want to be crawled.

1. Edit a page and click on **More Settings**.
2. An overlay will appear. Then select **Allow page to be crawled by search engines**.  
**Note:** Once you have SEO enabled, all new pages will have "Allow page to be crawled by search engines" selected by default.
3. Click **Save** and the overlay will close. The either click **Publish** or **Update** for your settings to go live.

Save | View Page | Delete

Type: ☒ Text ☐ Video ☒ Collect reader feedback [More settings](#) Status: **Published** Unpublish

Page Title: URL:

Page Settings

Author: John Rice

**Table of Contents** ☒ Show page in Table of Contents

**PDF** ☒ Default page to be included in site PDF

**Search results** ☒ Show page in search result

Enter search keywords. Separate each word or phrase by a comma.

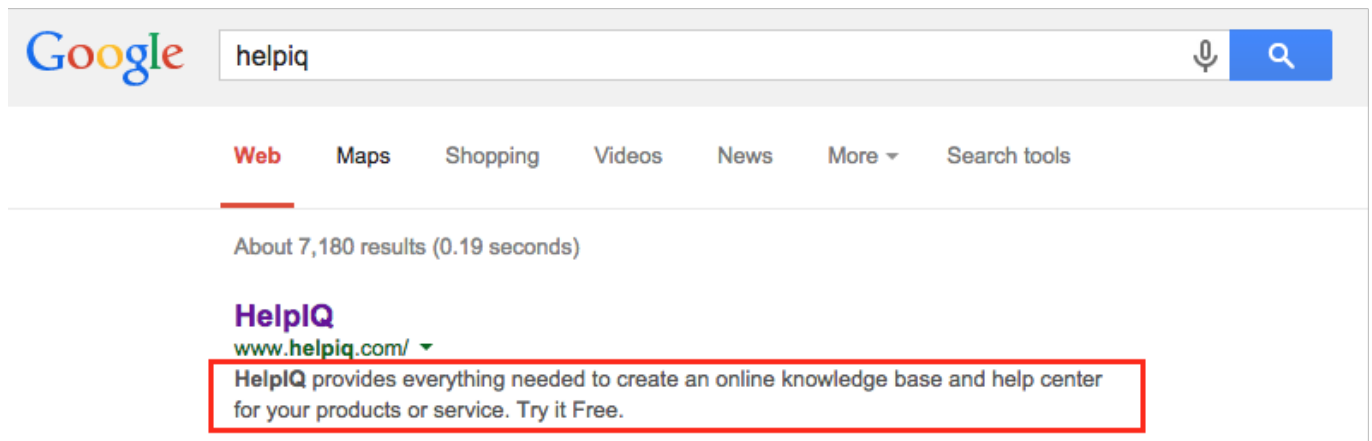
**Search engines** ☒ Allow page to be crawled by search engines (Google, Yahoo, Bing)

How to update your profile guide is very important

Enter meta description. Limit to 150 characters

Save Close

- Under the "Allow page to be crawled by search engines" checkbox is the Meta Description.
- A **Meta Description** allows you to give meaningful description to your page which is usually used by search engines in their search results as shown in the image below. It allows maximum of 150 characters.



## Bulk Enable SEO

- If you have many pages you want to enable SEO you can do this in bulk using the [bulk update](#) feature. **SEO** is one of the [columns that can be shown](#) in your **View All pages** grid to easily spot if a page is SEO crawlable.
- From the toolbar click **View All > All Pages**
- To select a page, click the check box at the left-hand side of that page. To select multiple pages, keep selecting more pages by checking their respective check boxes. Then click **Bulk Edit**.
- Change the SEO Crawlable option to **Yes** and click **Update**.
- [Bulk-publish](#) these changes.

A screenshot of a dialog box titled 'Bulk updated 2 pages.' with a close button (X) in the top right corner. The dialog contains several settings, each with a dropdown menu:

- Type: No Change
- Author: No Change
- Show in PDF: No Change
- Show in Table of Contents: No Change
- Show page in search result: No Change
- Collect feedback: No Change
- SEO Crawlable: Yes

Below these settings is an 'Update' button. Two red arrows point to the 'SEO Crawlable' dropdown and the 'Update' button. At the bottom right of the dialog is a 'Close' button.

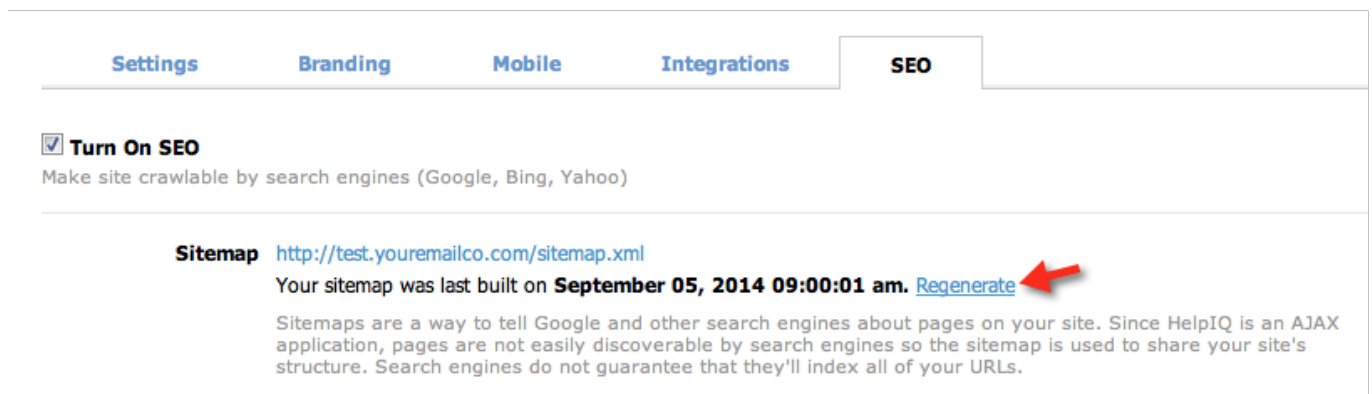


## Step 3 - Working with the Sitemap

A sitemap is a file that tells Google and other search engines about available pages on your site. ProProfs will automatically generate the sitemap and include pages that are published and have SEO enabled. Draft, hidden, or deleted pages will be excluded from the sitemap.

ProProfs will automatically regenerate your sitemap each night. However, to manually regenerate your sitemap:

- Go to **Settings > Add, Edit, and Customize a site**.
- Choose your site then click the **SEO tab**.
- Click on the **Regenerate** link in the **Sitemap** section.



**Settings**   **Branding**   **Mobile**   **Integrations**   **SEO**

☒ **Turn On SEO**  
Make site crawlable by search engines (Google, Bing, Yahoo)

**Sitemap** <http://test.youremailco.com/sitemap.xml>  
Your sitemap was last built on **September 05, 2014 09:00:01 am.** [Regenerate](#)

Sitemaps are a way to tell Google and other search engines about pages on your site. Since HelpIQ is an AJAX application, pages are not easily discoverable by search engines so the sitemap is used to share your site's structure. Search engines do not guarantee that they'll index all of your URLs.

The next step is to submit your sitemap to Google and Bing.

## Step 4 - Submitting to Google

Popular search engine providers give site owners several tools for managing how their pages should be crawled and indexed. This collection of tools is called Webmaster. You will use the Webmaster tools to submit your site to be index.

- Follow this guide for setting up [Google Webmaster](#)
- Follow this guide for setting up [Bing Webmaster](#)

## Step 5 - Wait for Results

After your site has been submitted to Google and Bing, wait patiently. Unfortunately, it is up to Google and Bing how fast it takes for your pages to show up in the search results. Also, search engines do not guarantee that they will index all of your pages either.

A few helpful tests:

- Go to Google or Bing and type: *site:docs.mysite.com* (replace with the real URL to your site). This will list all the pages indexed.

- Fetch Google Bot. A trick to getting pages to appear quicker in Google. See <http://searchenginewatch.com/article/2326164/Index-Your-Content-Faster-With-the-Fetch-a-s-Google-Tool>

## Google Analytics

Once your ProProfs site is indexed with Google you will want to know what people are searching for to find your pages and what pages are appearing in Google search results. You can connect [Google Analytics](#) to your ProProfs site and have access to such reports. The key reports include:

- **The SEO Queries Report** - The Queries report shows the Google search queries that generated the most impressions for your website. These are queries for which your pages get attention, so improved content could lead to more traffic.
- **The SEO Landing Pages Report** - The Landing Pages report shows the URLs to your website that have generated the most impressions in Google Web search results. With this report, you can identify landing pages on your site that have good click through rates (CTR)
- More about Google Analytics [https://support.google.com/analytics/answer/1308626?hl=en&ref\\_topic=1308589](https://support.google.com/analytics/answer/1308626?hl=en&ref_topic=1308589)

## Frequently asked questions

Here are some frequently asked questions:

### ***I submitted my site to Google and Bing and it is still not showing up, what is wrong?***

Crawling and indexing are processes which can take some time and which rely on many factors. In general, Google cannot make predictions or guarantees about when or if your URLs will be crawled or indexed. It can take 1 week to 3 months to have a site crawled. Make sure you sign up for a [Google Webmaster](#) or [Bing Webmaster](#) Account and submit your sitemap. Also make sure your pages contain enough relevant content.

### ***My site is indexed, but not showing up for keywords?***

Once you have established that your site has been crawled and indexed, getting the search results you want is the next big step and something that takes time and consistent effort, even for the most experienced SEO experts.

### ***Is Bing or Yahoo supported?***

At this time only Google is fully supported. We are working with Bing (which powers Yahoo) now to get ProProfs indexable.

### ***How can I see what pages Google has indexed?***

To quickly determine whether your site is indexed, just perform a Google or Bing search for its entire URL. A search for *site:ProProfs.com* (no spaces), for instance returns the following

results: <http://www.google.com/search?num=100&q=site:ProProfs.com>

### ***Do I need to do anything with the robots.txt file?***

A robots exclusion file tells search engines what they can and cannot crawl. You do not need to worry about this file as ProProfs will automatically manage it for your site once you enable SEO.

### ***Why is the wrong title appearing in the search results?***

The first line of any search result is the title of the web page. This text is generally taken from the contents of the

tag for that page (which is also the text that appears in the title bar of your browser). If the title tag is not meaningful, Google will pull the title from the page content or headings.

### ***How do I keep my site out of Google and Bing?***

By default all sites will have SEO disabled. Having SEO disabled means that Google and Bing will not be able to read your site. ProProfs uses a combination of Robots, meta, and AJAX to make a site completely blocked from the search engines.

### ***If I make one site crawlable, will my other sites also be crawled?***

If you enable SEO for one site, your other sites will not be crawled. You have to enable SEO for each site you want to be crawlable.

### ***What if I have links to a page I don't want crawled?***

ProProfs will automatically remove the links to pages that are not set to be crawlable so the search engine cannot follow them.

### ***How do I remove a page from Google?***

You can use the Webmaster tools. Follow this for Google  
[support.google.com/webmasters/answer/1663419?hl=en](http://support.google.com/webmasters/answer/1663419?hl=en)

### ***Why am I getting an error about Sitemap containing urls which are blocked by robots.txt?***

Google most likely still has the cached version of your robots.txt. It may take 24 hours to update.

## **Multiple Languages and SEO**

In ProProfs a site for each language is created and managed independently. For example, if you have a product called ABC Widget and need documentation in English and Spanish, you would need to create two sites in ProProfs (one in English and one in Spanish). Then you can link these sites together with a language drop down. Then domain url is also shared such as: *site.helpdocsonline.com* - for English and *site.helpdocsonline.com/es/* for Spanish site. Since each language is managed as a separate site in ProProfs you will need to submit each site separately in the [Webmaster](#) tools. For example, you would add a site "*site.helpdocsonline.com*" and then add another site for each language you have such as "*site.helpdocsonline.com/es/*"

# Google Webmaster Tools

Google Webmaster Tools is a free service by Google for webmasters. It allows webmasters to check indexing status and optimize visibility of their websites.

- [Step 1 - Google Account](#)
- [Step 2 - Add Your Site](#)
- [Step 3 - Verify Site](#)
- [Step 4 - Sitemap Submission](#)

---

## Step 1 - Google Account

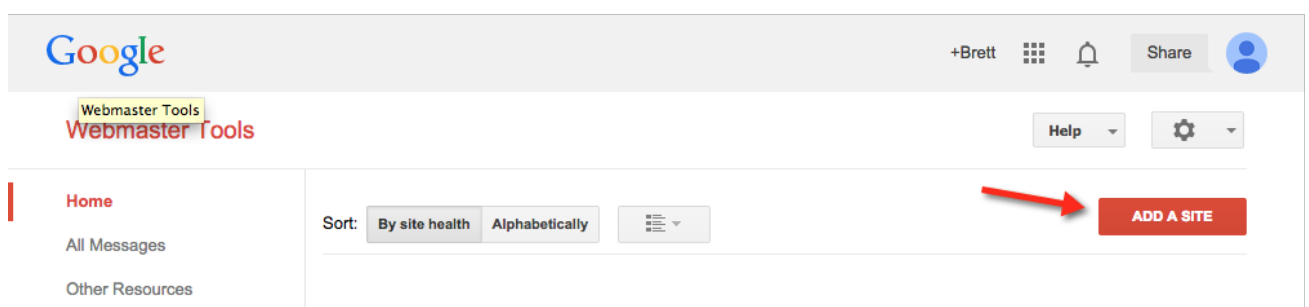
To start, you need a Google account. Please login or signup for an [account](#). Once logged in, you'll be able to add sites/domains on your Webmaster account.

## Step 2 - Add Your Site

Now you need to add your site. It's as simple as letting Google know what domain you are using for your ProProfs help site.

Follow these steps:

1. Sign into **Google Webmaster Tools** with your Google Account.
2. Click the **Add a Site** button.



3. And overlay will appear. Enter in the entire URL such as `http://mysite.example.com/`
4. Click **Continue**. The Site verification page opens.

## Step 3 - Verify Site

- Immediately after adding a site, Google allows you to verify ownership.
- When asked for methods you prefer, select the **Alternate methods** tab, choose **HTML**

**tag** then copy the meta tag HTML code. You will need to click on verify only after the code is added in ProProfs.

### Webmaster Tools

Verify your ownership of <http://test.yourexample.com/>. [Learn more.](#)

Recommended method

Alternate methods

☒ **HTML tag**

Add a meta tag to your site's home page.

1. Copy the meta tag below, and paste it into your site's home page. It should go in the <head> section, before the first <body> section.

```
<meta name="google-site-verification" content="FATKrCGAXSstS2XpYZhBeUk26qNYbOmVVraC3e12E0Y" />
```

► [Show me an example](#)

2. Click **Verify** below.

To stay verified, don't remove the meta tag, even after verification succeeds.

☐ **Domain name provider**

Sign in to your domain name provider.

☐ **Google Analytics**

Use your Google Analytics account.

☐ **Google Tag Manager**

Use your Google Tag Manager account.

**VERIFY**

Not now

- Return to ProProfs and go to **Settings > Add, Edit and Customize a site**. Choose the site you want SEO enabled then click on **SEO** tab.
- Paste in the code from Google in the proper field and make sure you save it.

**Settings**

**Branding**

**Mobile**

**Integrations**

**SEO**

☒ **Turn On SEO**

Make site crawlable by search engines (Google, Bing, Yahoo, etc)

**Site map** <http://seod.huenits.com/sitemap.xml>

Your sitemap was last built on **August 28, 2014 08:20:01 am**. [Regenerate](#)

Sitemaps are a way to tell Google and other search engines about pages on your site. Since HelpIQ is an AJAX application, page are not easily discoverable by search engines so the Sitemap is used to share your site's structure. Search engines do not guarantee that they'll index all of your URLs.

**Sitemap Updates** After any change, we can automatically notify search engines (no registration is required)

☒ **Notify Google** You can register at [Google Webmaster Tools](#) to check crawling statistics

**Webmaster** You can use the inputs below to verify your site with the different Webmaster Tools.

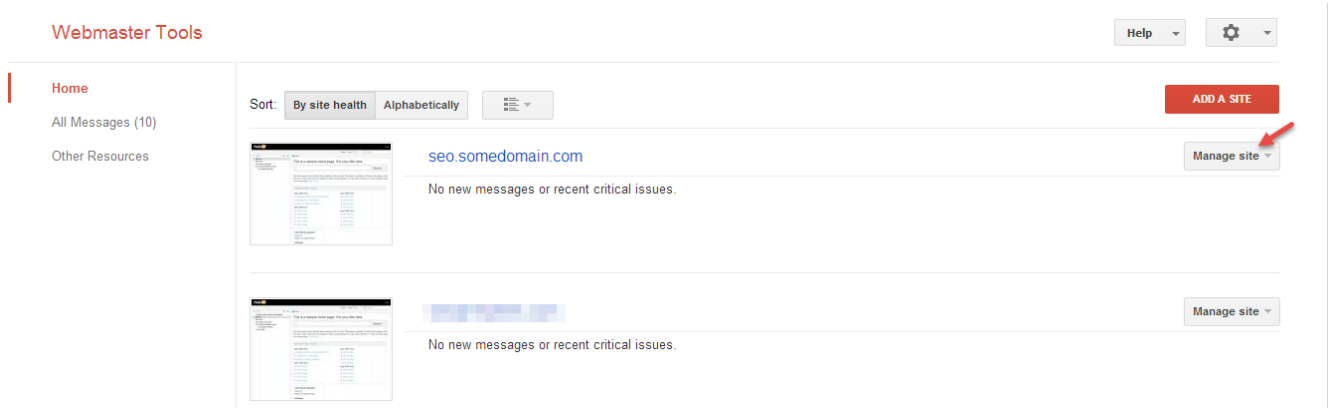
Google

```
<meta name="google-site-verification" content="iAxy43cqBvdXvMdh_YaAgDe44sSl5iy"
```

[Follow this guide](#) to add and verify your site with Google

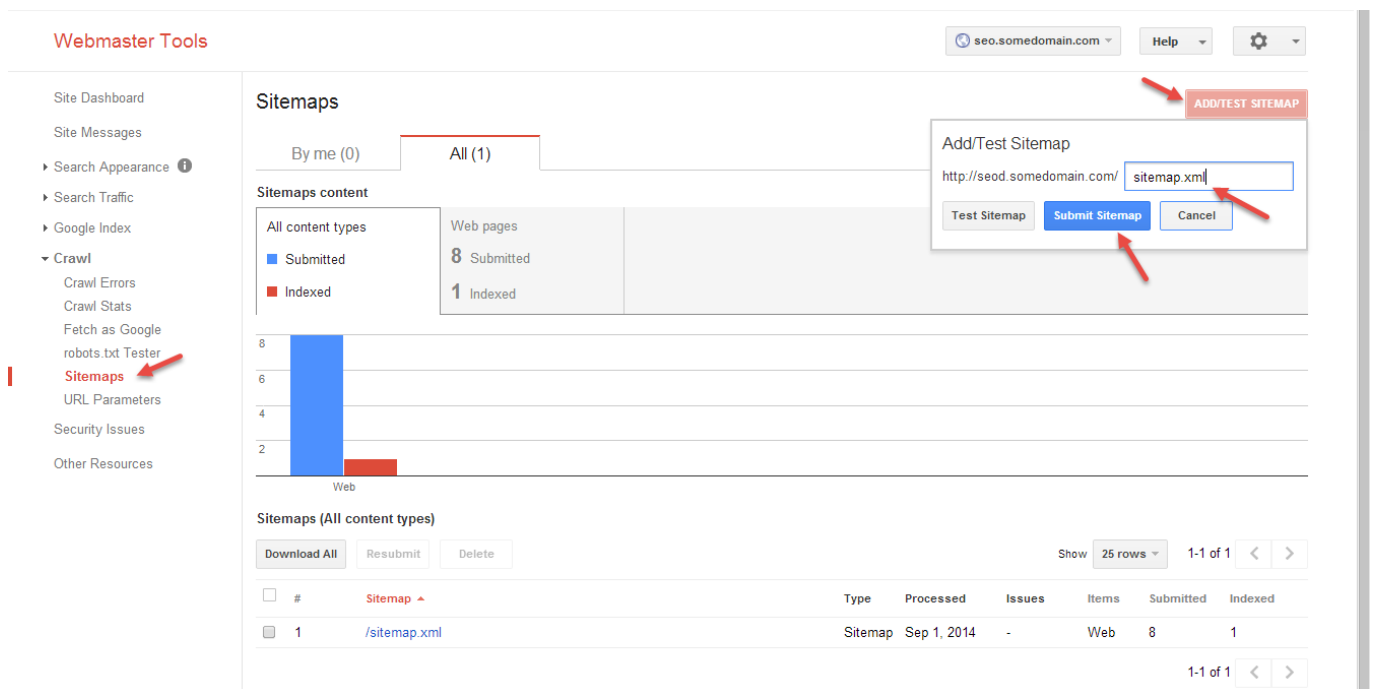
- Return to Google Webmaster's page where you got your code and now click **Verify**. If you received no error, then you're able to verify your ownership.

- After successful verification, go to Google Webmaster's home page and look for the site you just added.
- Click **Manage Site**.



## Step 4 - Sitemap Submission

- Inform Google the location of your sitemap by going to **Sitemaps** under **Crawl** in the sidebar.
- Click **Add/Test Sitemap** and in the dropdown
- Type **sitemap.xml** then click **Submit Sitemap**.



Now your sitemap will be added to Google. [View SEO Guide](#)

**Suggested Reading:** [Bing Webmaster Tools](#)

# Bing Webmaster Tools

- [Step 1 - Microsoft Account](#)
- [Step 2 - Add Site](#)
- [Step 3 - Site Verification](#)

## Step 1 - Microsoft Account

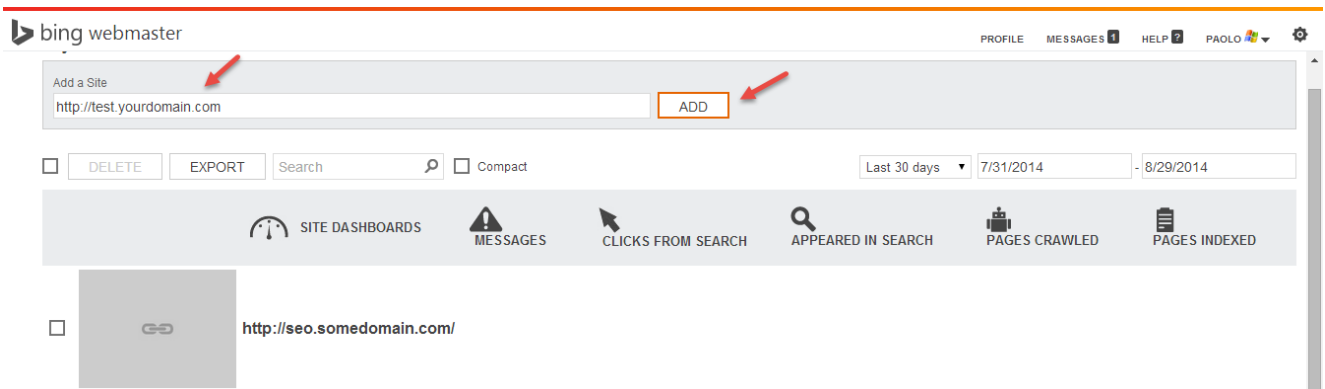
To start, you need a Microsoft account. Please login or signup for an [account](#). Once logged in, you'll be able to add sites/domains on your Webmaster account.

## Step 2 - Add Your Site

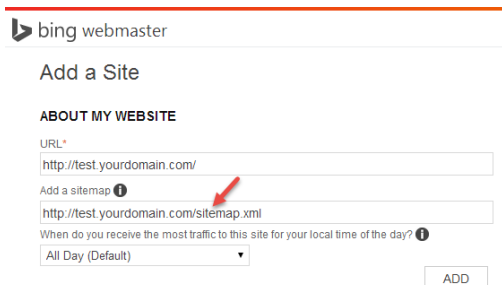
Now you need to add your site. It's as simple as letting Bing know what domain you are using for your ProProfs help site.

Follow these steps:

- Sign into **Bing Webmaster** with your Microsoft account
- The top section of the home page allows you to add a site. Type your domain then click **Add**.



- Confirm your domain on the next page.
- You should also add your sitemap. The URL of your sitemap will be your domain forward slash sitemap.xml
- For example, *http://mysite.domain.com/sitemap.xml* (just add /sitemap.xml to the end of whatever your site URL is)



bing webmaster

Add a Site

ABOUT MY WEBSITE

URL\*

<http://test.yourdomain.com/>

Add a sitemap ⓘ

<http://test.yourdomain.com/sitemap.xml>

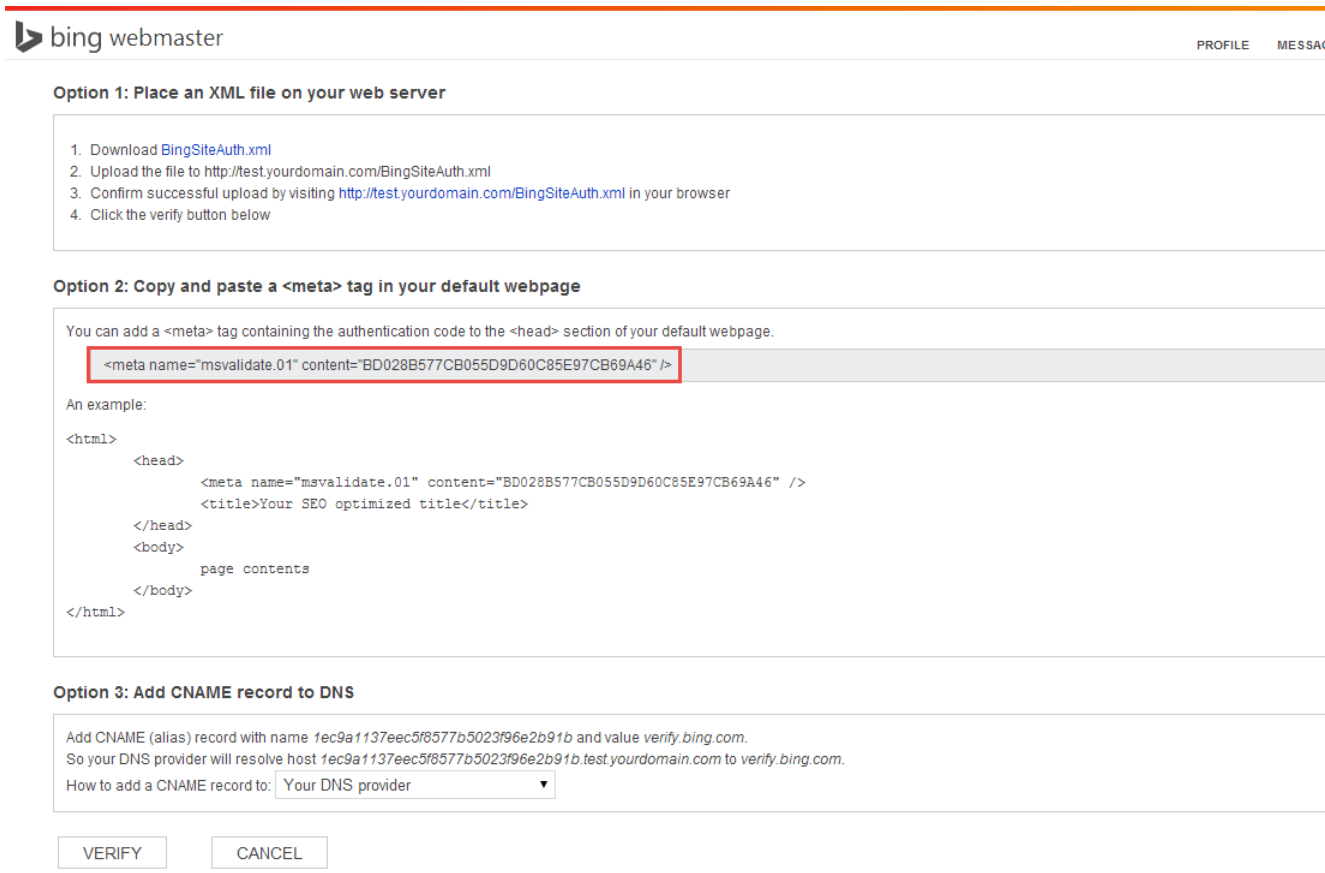
When do you receive the most traffic to this site for your local time of the day? ⓘ

All Day (Default)

ADD

## Step 3 -Site Verification

- Immediately after adding a site, the next page allows you to verify your site ownership. Just copy the code enclosed by a red box below



bing webmaster

PROFILE MESSAGE

Option 1: Place an XML file on your web server

1. Download [BingSiteAuth.xml](#)
2. Upload the file to <http://test.yourdomain.com/BingSiteAuth.xml>
3. Confirm successful upload by visiting <http://test.yourdomain.com/BingSiteAuth.xml> in your browser
4. Click the verify button below

Option 2: Copy and paste a <meta> tag in your default webpage

You can add a <meta> tag containing the authentication code to the <head> section of your default webpage.

`<meta name="msvalidate.01" content="BD028B577CB055D9D60C85E97CB69A46" />`

An example:

```
<html>
  <head>
    <meta name="msvalidate.01" content="BD028B577CB055D9D60C85E97CB69A46" />
    <title>Your SEO optimized title</title>
  </head>
  <body>
    page contents
  </body>
</html>
```

Option 3: Add CNAME record to DNS

Add CNAME (alias) record with name `1ec9a1137eec5f8577b5023f96e2b91b` and value `verify.bing.com`.  
So your DNS provider will resolve host `1ec9a1137eec5f8577b5023f96e2b91b.test.yourdomain.com` to `verify.bing.com`.

How to add a CNAME record to: Your DNS provider

VERIFY CANCEL

- Return to ProProfs and go to **Settings > Add, Edit and Customize a site**. Choose the site you want SEO enabled then click on **SEO** tab.
- Paste in the code from Bing in the proper field and make sure you save it.



[Settings](#) [Branding](#) [Mobile](#) [Integrations](#) **SEO**

☒ **Turn On SEO**  
Make site crawlable by search engines (Google, Bing, Yahoo, etc)

**Site map** <http://seod.huenits.com/sitemap.xml>  
Your sitemap was last built on **August 28, 2014 08:20:01 am**. [Regenerate](#)  
Sitemaps are a way to tell Google and other search engines about pages on your site. Since HelpIQ is an AJAX application, page are not easily discoverable by search engines so the Sitemap is used to share your site's structure. Search engines do not guarantee that they'll index all of your URLs.

**Sitemap Updates** After any change, we can automatically notify search engines (no registration is required)  
☒ **Notify Google** You can register at [Google Webmaster Tools](#) to check crawling statistics  
☒ **Notify Bing / Yahoo** You can register at [Bing Webmaster Tools](#) to check crawling statistics

**Webmaster** You can use the inputs below to verify your site with the different Webmaster Tools.  
Google   
[Following this guide](#) to add and verify your site with Google  
Bing/Yahoo   
[Following this guide](#) to add and verify your site with Bing

- Now return to Bing and click the **Verify** button on the last screen you were working on earlier.
- If you find no error after submission, you have successfully added and verified your site in Bing.

**Suggested Reading:** [Google Webmaster Tools](#)

# Private Sites & Single Sign-On

# Making a Site Private

If you do not want your ProProfs site to be visible to the general public, you can restrict access to it by using the private site feature. Then anyone who navigates directly to your site's URL would *not* be able to view your ProProfs site.

A user in ProProfs is someone that can log in and author help pages, administer the application, add content, and more. What actions ProProfs users can perform depends on their [role](#). People who read your documentation logged-out (such as your customers) are called end users.

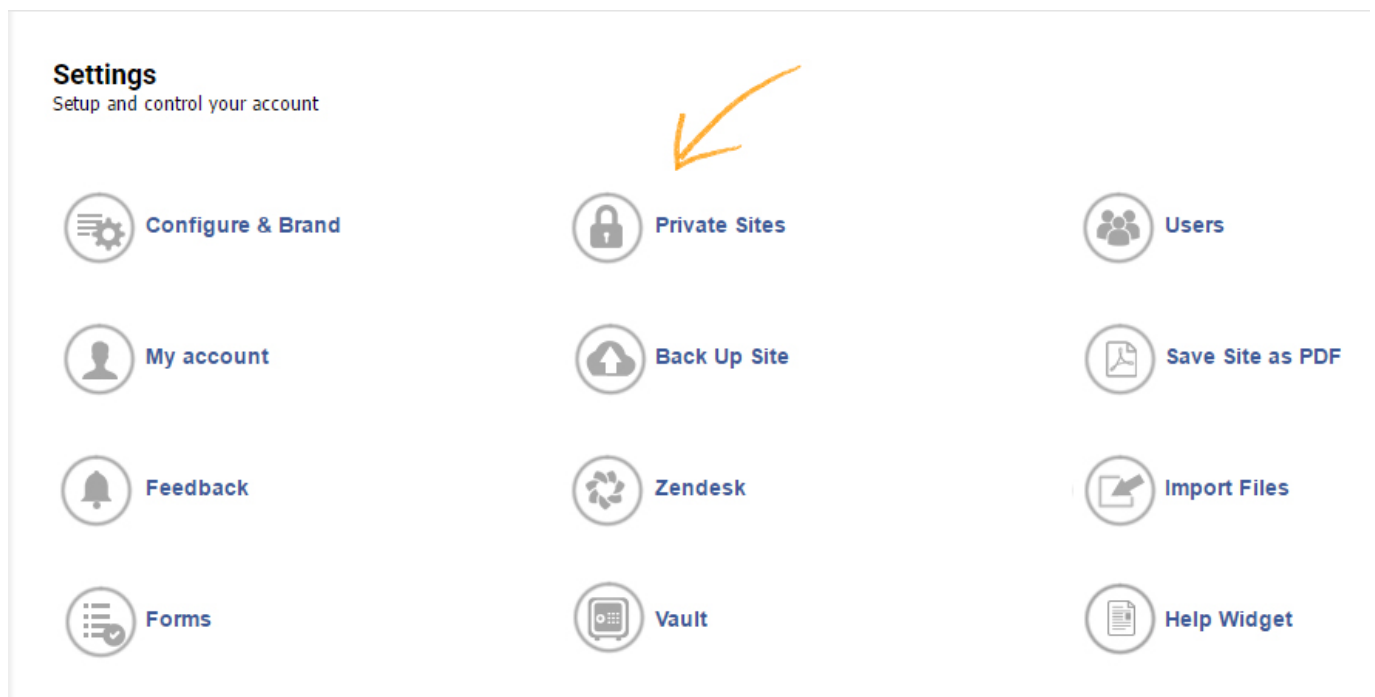
ProProfs does not have a user management system for your end users. Instead, you can use your authentication/login system via [Single Sign-On \(SSO\)](#) to authenticate your end users.

## Enable Private Sites

If you do not want your ProProfs site to be visible to the general public, you can restrict access to it by using the Private site feature. Then anyone who navigates directly to your site's URL would *not* be able to view your ProProfs site. You can set it up to redirect end users to another URL.

**Step1.** Log in to your account (as an Administrator) and click **Settings**.

**Step2.** Click **Private Sites**.



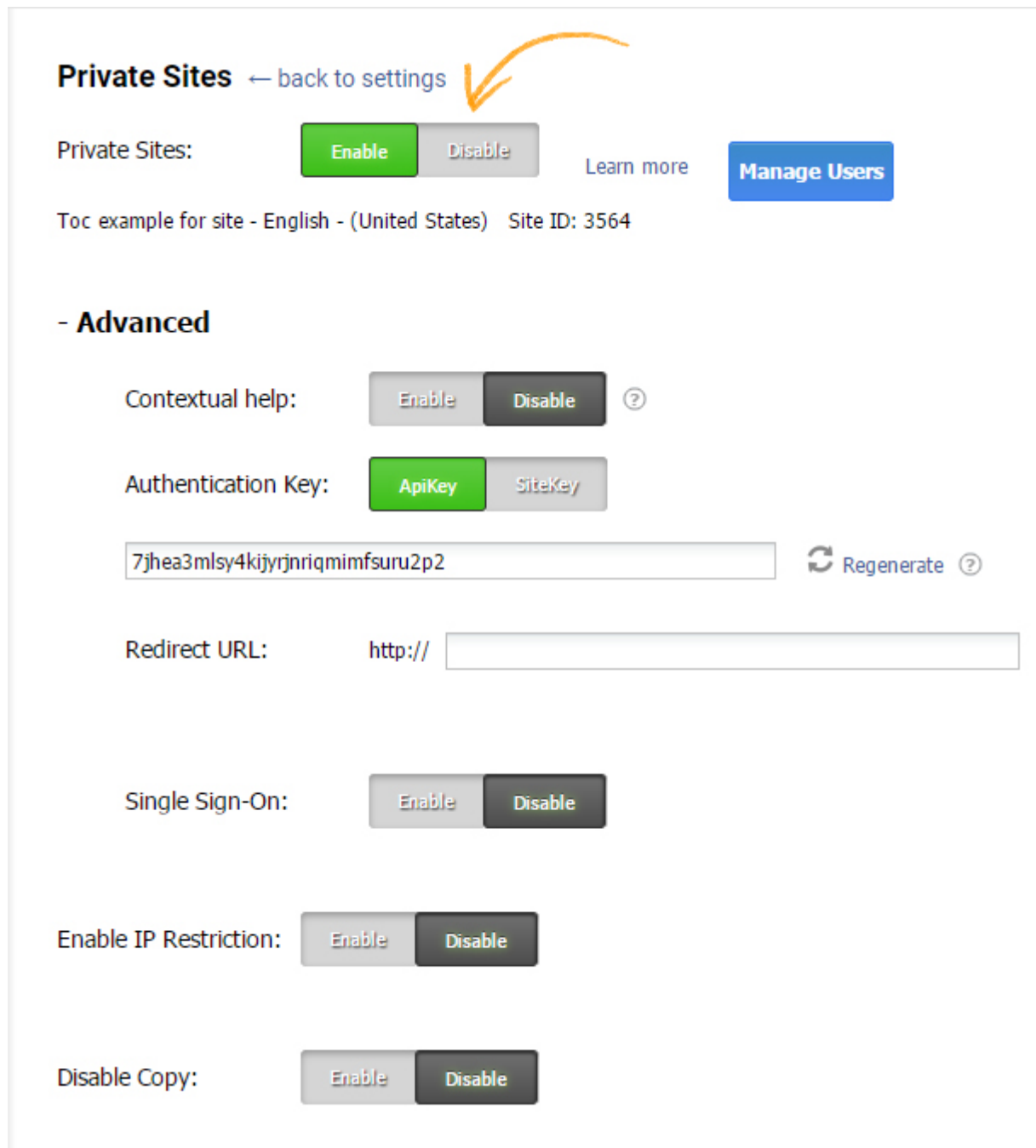
**Step3.** Select the site which you want to make private from the list of sites.

**Private sites** [← back to settings](#)  
[Learn more](#)

Select the site 

Site	language	URL	
<a href="#">Toc example for site</a>	English - (United States)	<a href="http://examplesforsite2.helpdocsonline.com/">http://examplesforsite2.helpdocsonline.com/</a>	<a href="#">Select</a>
ProProfs Knowledgebase	English - (United States) (default)	<a href="http://knowledgebase.proprofs.com/">http://knowledgebase.proprofs.com/</a>	<a href="#">Select</a>

**Step4.** Enable private sites by clicking on the toggle button (refer to the image below).



**Private Sites** [← back to settings](#)

Private Sites: ☒ **Enable** ☐ **Disable** [Learn more](#) [Manage Users](#)

Toc example for site - English - (United States) Site ID: 3564

**- Advanced**

Contextual help: ☐ **Enable** ☒ **Disable** [?](#)

Authentication Key: ☒ **ApiKey** ☐ **SiteKey**

[Regenerate](#) [?](#)

Redirect URL:

Single Sign-On: ☐ **Enable** ☒ **Disable**

Enable IP Restriction: ☐ **Enable** ☒ **Disable**

Disable Copy: ☐ **Enable** ☒ **Disable**

**Some pointers:**

- **API Key** - Use API key when you want multiple private sites accessible to a single user. The

API key is a unique alphanumeric sequence used as an authentication medium for all of your private sites.

- **Site Key** - Use SiteKey when you want a single private site accessible to the end-user. SiteKey is a web-based security system that provides mutual authentication between end-users and websites. SiteKey authentication is capable of eradicating phishing and protecting your end-users from online frauds. It is a unique alphanumeric sequence which works for a single private site so you can prevent unauthorized access to your site.
- [Contextual Help](#) > **Allow public view access to contextual help** - You have the option to make the contextual tools accessible for logged out users even if Privacy is enabled for the site.
- **Redirect URL** - This is the URL the end user will be redirected to when trying to access your ProProfs site directly. It could be your web application's login page, for example, <http://myapp.com/login>. If you enable this, then anyone trying to view your site will be redirected to your login page.
- **Single Sign-On** - Enable single sign-on for your site.
- **Save** - Click Save to save the settings.
- **Cancel** - Click Cancel to return to the Settings page without saving these settings.

#### Related Articles:

[IP Restrictions](#)

[Single Sign-On](#)

[JWT Single Sign-On](#)

# Restricting Site Access Using IP Restrictions

This feature allows you to restrict viewing and log in access to only designated IP addresses. If a user tries to view or access the site from an IP that is not provided, they will not be able to access the site. This includes logged in users and logged out users. This feature is especially valuable if you only want your site viewable by certain people or location such as your company network.

An IP (Internet Protocol) address is a unique address that devices like computers, phones, routers, etc., all use to identify itself to communicate with other devices in a network. You can enter in a single IP or a range of IP.

## Enable IP Restrictions

1. Log in to your account (as an Administrator) and click **Settings**.
2. Click **Private Sites**.
3. Check **Enable IP Restrictions** and additional options will appear.

ProProfs Knowledgebase - English - (United States) (default) Site ID: 3335

Manage IP Access:

\* Restrict these sites: ☐ ProProfs Knowledgebase - English - (United States) (default)

Bypass Private site: ☐

\* Allowed IPs:  ?

Your current IP is: **45.64.11.90**

Bypass: Enable certain user roles to login and bypass IP restriction

<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	Administrator
<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	Editor
<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	Contributor
<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>	Viewer

- Under **Restrict these Sites** select which sites you want to restrict.
- **Allowed IPs** - Enter the IP address you want to allow. For IP ranges enter using:
  - Wildcard format: 1.2.3.\*

- CIDR format: 1.2.3/24 or 1.2.3.4/255.255.255.0
- Start-end format: 1.2.3.0-1.2.3.255

## Enable Certain Users to Bypass IP Restrictions

In some cases, you may want to allow certain user roles to be able to access your ProProfs site from outside of the allowed IP restrictions. To enable the feature, select the user roles you want to be able to access the site regardless of the IP restrictions.

### Related Articles:

[Private Sites](#)

[Single Sign-On](#)

[JWT Single Sign-On](#)

# Single Sign-On (SSO)

ProProfs supports Single Sign-On (SSO) which will allow you to authenticate your end users using your authentication service, such as your web application's login. Once verified, your end users can then view your ProProfs site. However, if your end users navigate directly to your ProProfs website without first authenticating, they would be redirected to your login page.

Single Sign-On (SSO) works as a "shared secret" between ProProfs and your local application. When Single Sign-On is enabled, end users are redirected from ProProfs to a login page located on your server. End users log in to your web application just like they usually would. Once successfully logged in, a script will execute and tell ProProfs that the end user is authentic. ProProfs then grants access for the end user to view your ProProfs site.

- [Single Sign-On \(SSO\)](#)
- [How Single Sign-On Works](#) (Use cases)
- [Parameters](#)
- [How to Enable Single Sign-On](#)
- [Sample Authentication Script](#)
- [Login URL](#)
- [SSO Alternatives](#)
- [Zendesk Single Sign-On](#)

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## Single Sign-On (SSO)

### How Single Sign-On (SSO) Works

A shared API key between your local authenticating mechanism and ProProfs is the basis of **Single Sign-On (SSO)**. This API key is used to generate a hash used by ProProfs to ensure that end users have permission to visit your ProProfs site. Below is the outline of some used cases.

### End users go directly to your ProProfs site

1. Your end user attempts to visit your ProProfs site when Private Site is enabled (either by directly going to the URL, e.g., [mysite.helpdocsonline.com](https://mysite.helpdocsonline.com) or by using a bookmark).



2. ProProfs will check the end user's browser session to determine whether the end user has already been granted access to your ProProfs site.
3. If access was not previously granted, ProProfs redirects the end user to your login page, located on your server (such as <http://ourdomain.com/login>).
4. The end user logs in to your web application or authentication system in the usual way.
5. When the login is successful, a script runs on your web application. This script passes to ProProfs your site\_url, return\_page, and md5 API key.
6. ProProfs will match the API key to make sure it is authentic.
7. Then your end user is redirected back to your ProProfs site, and a browser session is established. The user can then browse your ProProfs site. Once the end user logs out or closes the browser window, the end user will be required to reauthenticate as described above.

## End-user logs in directly to your web application (skips the routing step)

You can also set up this feature, so your end users aren't redirected back to your login page when they visit your ProProfs site. When your end users log in to your web application, you can authenticate them to establish a session with ProProfs immediately. Then if your end users visit your ProProfs site, they will **not** be redirected and can view your site directly.

1. Your end users log in to your web application.
2. When the login is successful, the SSO script logs out.
3. The end user is authenticated, a session is established in ProProfs (while the end user is still on your site).
4. If the end user clicks a link or goes directly to your ProProfs site, they will be able to browse your ProProfs site without having to authenticate.

## Parameters

The remote authorization URL is [http://helpdocsonline.com /access/remote/](http://helpdocsonline.com/access/remote/). The full redirect URL, with parameters, would look something like this:

```
https://www.helpdocsonline.com/access/remote/?api_key=<MD5(api_key)>&site=https://yoursite.helpdocsonline.com&return_page=/pageURL&site_access=45,34
```

When you redirect your end users back to ProProfs, you should pass the following parameters:

1. **api\_key** (required) - The hash-encoded API key is the shared secret between ProProfs and your local website. You can access it from *Settings > Private Sites*.

2. **site** (required) -It is the URL of your ProProfs site, e.g., mysite.helpdocsonline.com
3. **return\_page** (optional) - You can also pass the page URL. For example, if an end user visits a specific ProProfs page (such as <http://mysite.helpdocsonline.com/pagename>) and is redirected to your web application to log in, you can return them to that particular page after they are redirected from your login page to ProProfs.
4. **site\_access** (optional) - Specify the ID of the sites that the user is allowed to view. For example, let's say you have ten different websites, but you only want the user to be able to access two of them. You can specify the IDs of those websites, and the end user will just be able to view those sites. Be mindful of separating multiple websites with commas.

Usage of the above parameters is further defined in the sample script.

## How to Enable Single Sign-On

1. Log in to your account (as an Administrator) and click **Settings**.
2. Click **Private Sites**.  
The private sites page will appear.

## Private Sites << back to admin

☒ **Turn On Private Sites**  
Make sites inaccessible to the general public.

\* **Make these Sites Private:** ☐ a-test-site - English - (United States) ☒ sso2 - English - (United States)

**API Key**  [Regenerate](#)  
In order for your end-users to view a site the API key must be passed to HelpIQ. The API key is a shared secret between you and HelpIQ. It must never be publicized.

**Contextual help** ☐ Allow public view access to contextual help  
Select this option if you want your site to be private but contextual still viewable to logged out users

**Single Sign-On** ☒ **Turn On Single Sign-On**  
Single Sign-On allows you to use an existing authentication mechanism or login page (e.g., your web app or active directory) for end users to view your HelpIQ site. [Learn more.](#)  
You can [download a sample PHP](#) script to get started with HelpIQ Single Sign-On.

☒ End users can only view the site they log in to. Their access to your other sites is blocked.

\* **Auth URL**  ☐ Use https  
This is the URL that HelpIQ will invoke to attempt remote authentication, e.g., http://yourcompany.com/services/helpiq-auth.php.

**Logout URL**  ☐ Use https  
This field is optional. If a Remote Logout URL is entered, the **Log out** link in HelpIQ can end the session in HelpIQ and the session in your web application.

☐ **Enable IP Restriction**  
You can restrict access to your HelpIQ sites to only users within an allowed range of IP addresses. For example, you could enter your company's network. [Learn more.](#)

3. Check **Turn On Private Sites**.
4. Select the sites you want to make private.
5. Then check **Turn On Single Sign-On**.

The following settings also appear.

- **API Key** - For SSO to work, the API key must be passed to ProProfs. The API is a shared secret between you and ProProfs. It must never be publicized. Copy this API key to add to your SSO script. You can also change the API key at any time by clicking Regenerate. It will generate a new API key and invalidate the old one.
- **End users can only view the site they log in. They do not have access to your other websites.** Having this checked means if a user logs in from site1 and then went directly to site2, they will be redirected back to site1.

NOTE: you can also use the site\_access parameter to define which sites the end user can

access.

- **Auth URL** - This is the URL that a user is redirected to in case of an attempt to view a private site page, but there's no valid ProProfs viewer session yet. In this event, we always pass the page and website that was being accessed using query parameters *site* and *return\_page*. It is handy because the tendency is to redirect the customer back to the previous page after being granted access to your scripts.
- **Logout URL** - This field is optional. If a Logout URL is entered, the **Logout** link in the help site ends the viewer session on ProProfs *and* then redirects the user to this URL.
- **Save** - To save the settings.
- **Cancel** - Click Cancel to return to the Settings page without saving these settings.

## Sample SSO Script

We have provided a sample PHP implementation, which you can use as a guide when you incorporate SSO feature into your authentication system. You can download these PHP scripts containing comments at <https://github.com/proprofs-account/sso-php>. You can also download an ASP.NET version from <https://github.com/proprofs-account/sso-php>.

### How the sample script works

The sample SSO scripts are at work whenever a user without a valid ProProfs viewer-only session visits a page on an SSO enabled private site. The script will do a check to see if the user is already logged into your web app and will allow the user to view your ProProfs site or redirect them to your login page. The redirects are browser-based and do not require ProProfs to access your database, network, or authentication system directly.

In a nutshell, what the system is doing is triggering a remote URL on our end along with your private API key to initiate a valid viewer-only session for your help site. This sample implementation assumes that if a user logs in, you want to give that user access to the help site. Your developer can be creative and alter this criterion based on how you do your authentication.

- First, let's take a look at ***ProProfs-auth.php***

This file is merely initiating an object of class **ProProfs\_SSO\_Support**. You can set your site parameters in this file. It calls the **do\_ProProfs\_authorization()** method which does several things in this demo app. It's explained in detail in the class file.

```
require_once('lib/ProProfs_SSO_Support.php');  
//enter your API key here  
$ProProfs_api_key = '9d1e2693fe4fc477cf26bc0df3372985';
```

```
//enter your site URL here
$ProProfs_site_url = 'mysite.helpdocsonline.com';
// parameter site_access: this defines which sites are allowed, separate multiple sites
by comma
// If no value is set and the parameter is not included then we allow access to all
sites.
// If the parameter is set, then we only allow access to whatever sites are included
// If the user tries to go to a site they do not have permission we just take them to a
site they do have permission
$ProProfs_site_access = '';
$ProProfs_sso_support = new ProProfs_SSO_Support($ProProfs_api_key, $ProProfs_site_url);
$ProProfs_sso_support->do_ProProfs_authorization($ProProfs_site_access);
```

- Next, lets look at *lib/ProProfs\_SSO\_Support.php*

This file contains the ProProfs\_SSO\_Support class. This object is responsible for checking whether a user is logged in to your web application, and controls the redirection to URLs that are needed for different use cases.

The methods are:

- **ProProfs\_check\_local\_session()** assumes you identify that a user is logged in to your app if there's a **user\_id** key set in your PHP **\$\_SESSION** variable.

```
// Upon login of your application or website, a session is established for the user.
// This code will check the users session to determine if they are logged in.
// You can replace 'user_id' with whatever you want such as username, email, etc.
// All the system is doing here is checking to see if there is a value. If there is no
value, user requires to log in.
// If there is a value, pass the site parameters to
http://www.helpdocsonline.com/access/remote/ and establish a session on ProProfs.
public function ProProfs_check_local_session() {
return isset($_SESSION['user_id']) && !empty($_SESSION['user_id']);
}
```

- **ProProfs\_destroy\_local\_session()** which assumes that unsetting the user\_id key in PHP **\$\_SESSION** variable terminates your web app user's session.

```
//please destroy your local session data here
public function ProProfs_destroy_local_session() {
unset($_SESSION['user_id']);
}
```

- **logout\_ProProfs()** terminates the web app user session and then logs out the user. Then, it terminates the ProProfs session. After the session is terminated in ProProfs, behind the scene, **it redirects to your Auth URL but passes as parameter *action* which is sets to *action*.**

```
//logout the end-user from ProProfs, and it will redirect to your remote auth url
public function logout_ProProfs(){
```

```
$this->ProProfs_destroy_local_session();  
$logout_url = $this->ProProfs_remote_url.'logout/?site='.$this->custom_ProProfs_site;  
header('location:'.$logout_url);  
exit;  
}
```

- **do\_ProProfs\_authorization()** does the heavy work and runs everytime a page is accessed on a private site but no valid ProProfs session is available. This is the case in our sample implementation as it's being called in the Auth URL.

```
public function do_ProProfs_authorization($site_access = '') {  
    //If Remote logout URL is entered in ProProfs the 'log-out' link can destroy the  
    end-users session in ProProfs and the session on your web application.  
    $action = isset($_REQUEST['action']) ? (string)$_REQUEST['action'] : 'login';  
    $redirect_url = $this->default_login_url;  
    //When the Remote logout URL is empty, end-user logged out from ProProfs site,  
    //it will pass the logged_out parameter to tell customer's web app don't to give the  
    end-user access again, just redirect to local login page  
    $logged_out = isset($_REQUEST['logged_out']) ? $_REQUEST['logged_out'] : false;  
    if ('logout' == $action || 'custom_logout' == $action) {  
        $this->ProProfs_destroy_local_session();  
        $redirect_url = $this->default_login_url;  
    } else {  
        //your ProProfs site URL  
        $site = (string)$_REQUEST['site'];  
        //return_page is passed by ProProfs, it will redirect the end-user to a specific  
        page ProProfs  
        $return_page = (string)$_REQUEST['return_page'];  
        // please check your end-user has logged in here  
        $url_params = 'site='.$site.'&return_page='.$return_page;  
        if (!$logged_out && $this->ProProfs_check_local_session()) {  
            // if the end-user has logged in the customer's website/web application, call  
            ProProfs to establish a session  
            $redirect_url =  
            $this->ProProfs_remote_url.'?hash='.md5($this->ProProfs_api_key).'&'.$url_params;  
            if(!empty($site_access)) {  
                $redirect_url .= '&site_access='.$site_access;  
            }  
        } else {  
            // the end-user does not log in, redirect to error/log in page  
            if (isset($_REQUEST['contextual']) && $_REQUEST['contextual']) {  
                //if the refer page is a contextual help(lightbox/tooltip), redirect to show  
                permission limit  
                $redirect_url =  
                $this->ProProfs_remote_url.'permission_limit/?login=false&'.$url_params;  
            } else {  
                //redirect to your local application login page  
                $redirect_url = $this->default_login_url.'?'.$url_params;  
            }  
        }  
    }  
    header('location:'.$redirect_url);  
}
```

- Now let's look at **login.php** closely.
  - In this section:

```
session_start();
$current_url = explode('?', $_SERVER['REQUEST_URI']);
$current_url = explode('/', $current_url[0]);
array_pop($current_url);
$current_url = 'http' . ( !empty($_SERVER['HTTPS']) ? 's' : '' ) . '://' .
$_SERVER['HTTP_HOST'].implode('/', $current_url);
$login_url = $current_url.'/login.php';
if (isset($_REQUEST['submit'])) {
    $username = trim($_REQUEST['username']);
    $password = trim($_REQUEST['password']);
    if('demo' == $username && 'demo!' == $password){
        //establish the local loggedin session
        $_SESSION['user_id'] = 1;
        if (!empty($_REQUEST['site'])) {
            //if site parameters is not empty, redirect to remote log in URL, to establish the
            ProProfs session
            header('location:'.$current_url.'/ProProfs-
            auth.php?site='.$_REQUEST['site'].'&return_page='.$_REQUEST['return_page']);
            exit;
        } else {
            //redirect to local app
            header('location:'.$current_url.'/test.php');
            exit;
        }
    }
}
```

We made it so that if the user logs in with username: demo and password: demo!, they are assumed authenticated. We set `$_SESSION['user_id'] = 1`. Your authentication system will definitely be much more complex than this.

- Also, in this file, we have the behavior that if the user successfully logs in, they will be redirected to a test.php file in your web app unless there's a URL parameter *site* and an optional *return\_page* which will be used to redirect back the user.
- The **test.php** file just shows a logout link which points to the logout.php script. It demonstrates how to effectively logout the web app user and then logs out the ProProfs session too.
- The **logout.php** script mainly calls the **logout\_ProProfs()** method of the SSO class object which does the following:
  - Destroy the session for the web app user.

*Note: We were assuming that you are merely using something like a `$_SESSION['user_id']` to indicate whether a user is logged in or not. Your implementation will be much more complicated than this, and your developer needs to update it based on how your authentication system works.*

- Then terminate the viewer session in ProProfs.
- Then we redirect back to the **Auth URL**, but this time with query parameter '*action*' being set to log out which is caught by our sample script and just redirects the user to the local login page we have in the SSO class file.

If you need a script in another language, such as Java, you can follow the above examples and create your own. Please feel free to send us any samples.

## Login URL

Since you will no longer be able to visit your ProProfs site directly, you can log in at <https://www.proprofs.com/login/>.

**Note: Single Sign-On is for end users only. You will still need to log in to ProProfs as you usually do.**

## Zendesk Authentication

You can set up ProProfs so that only the logged-in Zendesk users can access and view your documentation. If an end user navigates directly to your ProProfs site without first logging into Zendesk, the end user would not be able to view your ProProfs documentation. Zendesk handles the authentication of your end users.

When the end user clicks on the **Documentation** tab in Zendesk, Zendesk will pass the API key to ProProfs and authenticate your end user so the end user can view your ProProfs site. The API code will automatically be included in the Zendesk Documentation-tab code snippet which ProProfs provides.

To use Zendesk authentication, first set your site as private (as defined above). Then follow these steps for adding a documentation [tab in Zendesk](#).

## SSO Alternatives

If your company does not have a developer or resources to hook-up SSO using the above method, you can use JavaScript or even pass the API key by URL. However, the above SSO method is recommended over JavaScript or URL because your API key is not exposed.

## JavaScript Method:

For this method to work, add this script to any of your web pages. When the script loads, the API key is shared via JavaScript and the user will have access to view your ProProfs site.



```
<script type="text/javascript"
src="http://yoursite.helpdocsonline.com/remote_auth/64ps4xoq2ut33mzzebrb8zfqmj8vzdj6?embed=true"></script> //replace with your ProProfs URL + API key
```

Replace API with your API key.

## URL Method:

For this method to work, add the URL+API key to a hyperlink on your referring web page. Then when the user clicks on the hyperlink, the API key will be passed and the user will be granted access to view your ProProfs site.

```
<a
href="http://yoursite.helpdocsonline.com/64ps4xoq2ut33mzzebrb8zfqmj8vzdj6?embed=true">Link
to your help site</a> //replace link your ProProfs URL + API key
```

### Related Articles:

[Private Sites](#)

[IP Restrictions](#)

[JWT Single Sign-On](#)

# How to Enable JWT Single Sign-On

With ProProfs Knowledge Base, you can use the JSON Web Token(JWT) to implement Single Sign-On(SSO). Single Sign-On enables you to enter multiple websites with the same credentials. JWT SSO works by creating a digital signature token in the form of a JSON(JavaScript Object Notation) which is then used for authentication and granting access.

**There are various parameters that need to be defined before a JWT is generated:**

## 1. Manual Parameters (To be entered by the user)

Name	Type	Description
key	Required	Private Site API key (md5 encrypted)
user_email	Required	User's Email to give access to sites accordingly
site_access	Optional	Site ID's (comma separated)

**Note:** API Key can be collected by going to **Settings -> Private sites**. Site ID can be found by going to **Sites -> Manage sites**.

## 2. Automatic Parameters (Will be generated & taken automatically)

Name	Type	Description
iat	Required	Token Issued at Time to make token valid only for 3 minutes (Current Unix timestamp)
jti	Required	Token JWT ID to ensure that same token cannot be used again (Random hash minimum 32 characters long)

### Things to Remember:

- Only a user registered in the Knowledge Base can log in using JWT
- Users are authenticated through their Email ID
- The generated JWT is valid only for 3 minutes
- A lack of Site ID will give the user access only to the site that is listed as the domain name (Check PHP Code below)

## Steps to Enable JWT Single Sign-On

**Step 1:** Create and enter the PHP code (like the sample given below) in your server.

Sample PHP Code:

```
$domain = "http://acme.helpdocsonline.com"; //Change your domain here

$key = md5("key goes here"); // md5 encrypted key change your key
$user_email = "acme@pros.com"; // Adds email of current login
$site_access = "44567,77898"; // Access of site(Enter Site ID here)
```

```
date_default_timezone_set("UTC");
$now = time();

// Create token header as a JSON string
$header = json_encode(['typ' => 'JWT', 'alg' => 'HS256']);

// Create token payload as a JSON string
$payload = json_encode([
    "iat" => $now,
    "jti" => md5($now.rand(100, 10000)),
    "user_email" => $user_email,
    "site_access" => $site_access
]);

// Encode Header to Base64Url String
$base64UrlHeader = str_replace(['+', '/', '='], ['-', '_', ''], base64_encode($header));

// Encode Payload to Base64Url String
$base64UrlPayload = str_replace(['+', '/', '='], ['-', '_', ''], base64_encode($payload));

// Create Signature Hash
$signature = hash_hmac('sha256', $base64UrlHeader . "." . $base64UrlPayload, $key, true);

// Encode Signature to Base64Url String
$base64UrlSignature = str_replace(['+', '/', '='], ['-', '_', ''],
base64_encode($signature));

// Create JWT
$jwt = $base64UrlHeader . "." . $base64UrlPayload . "." . $base64UrlSignature;

$retrun_url = $domain."/access/jwtssso/?token=".$jwt;

header("location: ".$retrun_url);
```

**Step 2:** In the code make sure to enter your **Domain name**, **API Key** and **Site ID**(Optional).

**Step 3:** Save the changes you have made.

## How does JWT SSO work?

Once a user has logged in to your server and they attempt to access ProProfs Knowledge Base, the PHP code is executed. The credentials of the user are crosschecked with the Knowledge Base and if the user exists, a token is generated. The token can then be used to log in. If the token is not used within 3 minutes, the user is denied access. If the user credentials are not found in the knowledge base, they are given visitor access to the knowledge base.

### Related Articles:

[Single Sign-On](#)  
[IP Restrictions](#)

## Private Sites

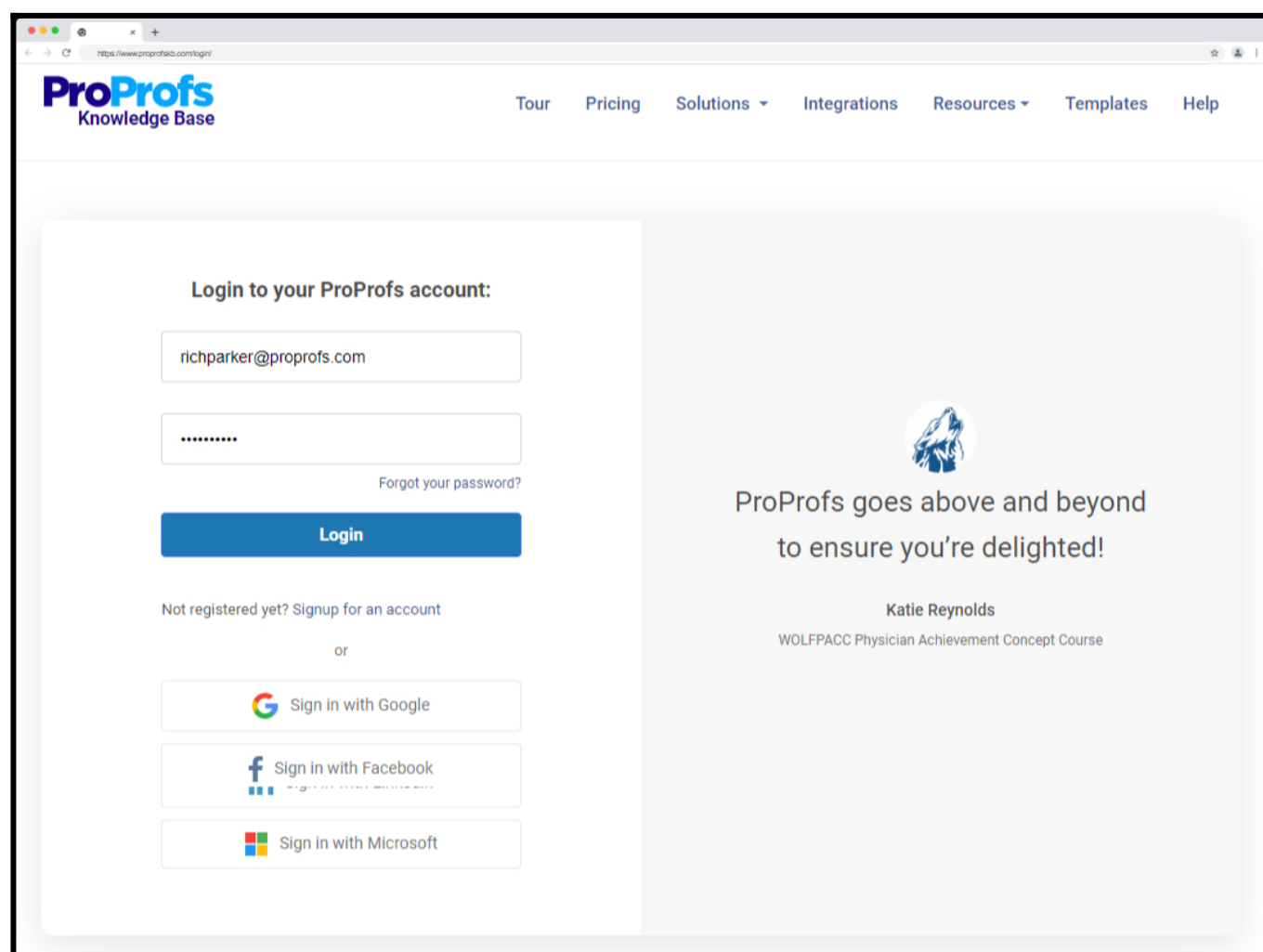
# User Management

# How to Enable Two-Factor Authentication

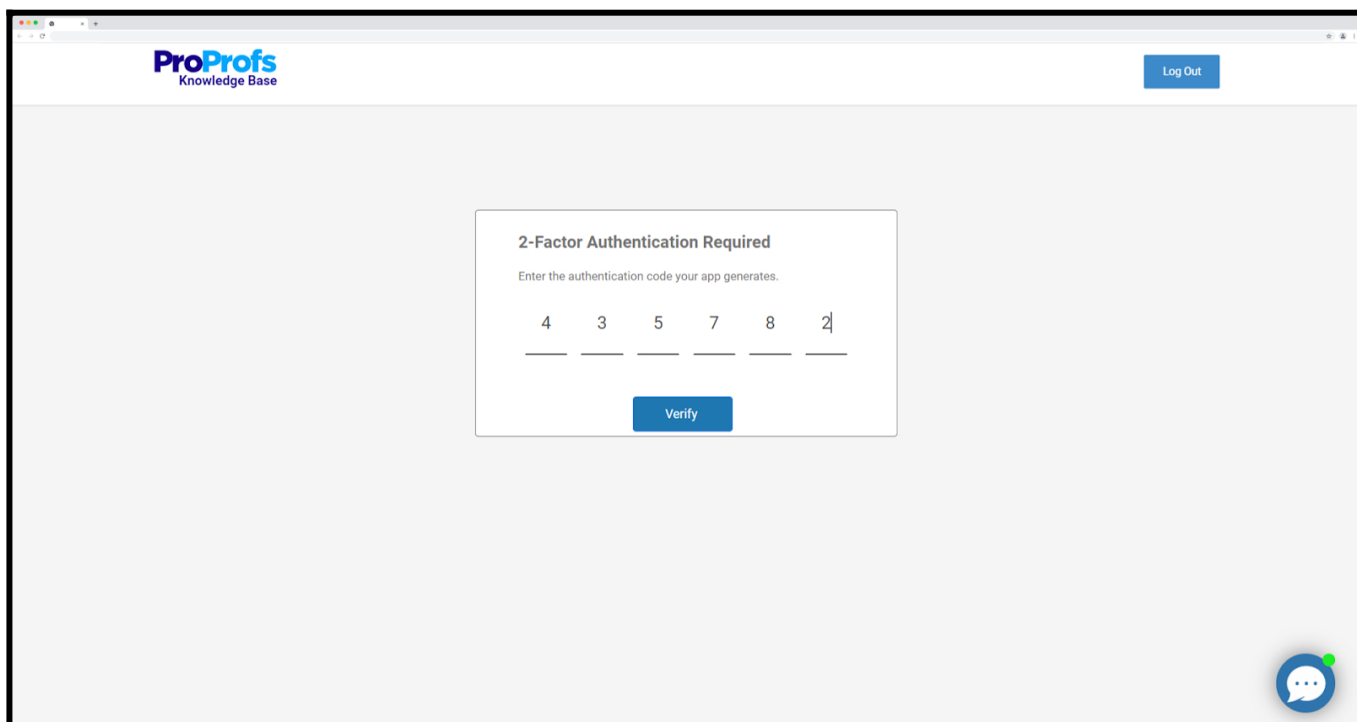
**Two-factor Authentication** uses a code verification method to confirm the user identity for a secure Knowledge Base Account. In **ProProfs Knowledge Base**, enabling two-factor authentication ensures an extra layer of security for your account.

**Here is how it works:**

Enter the login credentials of your ProProfs Knowledge Base account as you regularly do, then enter the six-digit security code received on your [Google Authenticator App](#).



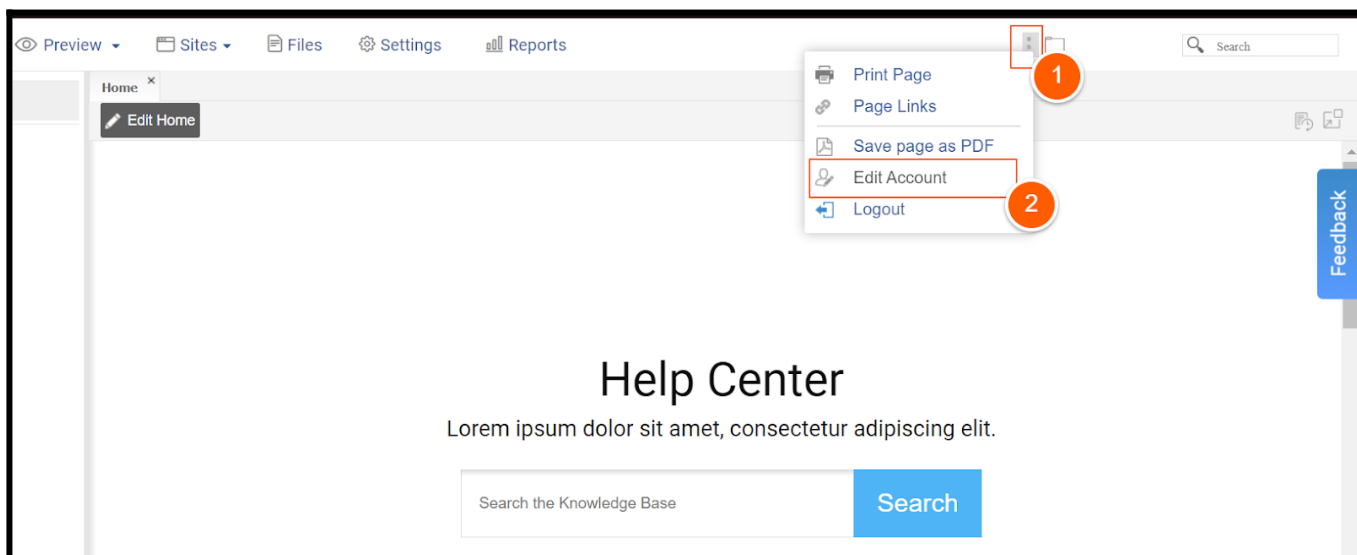
The screenshot shows the ProProfs Knowledge Base login interface. The header includes the ProProfs logo and navigation links: Tour, Pricing, Solutions, Integrations, Resources, Templates, and Help. The main content area is divided into two sections. The left section, titled 'Login to your ProProfs account:', contains a login form with fields for email (richparker@proprofs.com) and password (masked with dots). Below the password field is a 'Forgot your password?' link. A blue 'Login' button is positioned below the form. Underneath the login button, there is a link for 'Not registered yet? Signup for an account' and an 'or' separator. Below the separator are three social login buttons: 'Sign in with Google', 'Sign in with Facebook', and 'Sign in with Microsoft'. The right section features a circular profile picture of a woman, the text 'ProProfs goes above and beyond to ensure you're delighted!', the name 'Katie Reynolds', and the course title 'WOLFPACC Physician Achievement Concept Course'.



**Two-Factor Authentication** safeguards your account from any data breach.

## How to Enable Two-Factor Authentication in Your Knowledge Base

**Step 1:** In your ProProfs Knowledge Base editor, click **>> Edit Account.**



**Step 2:** In the **Edit Account** options, set **Enable Two-Factor Authentication** as **Yes**.

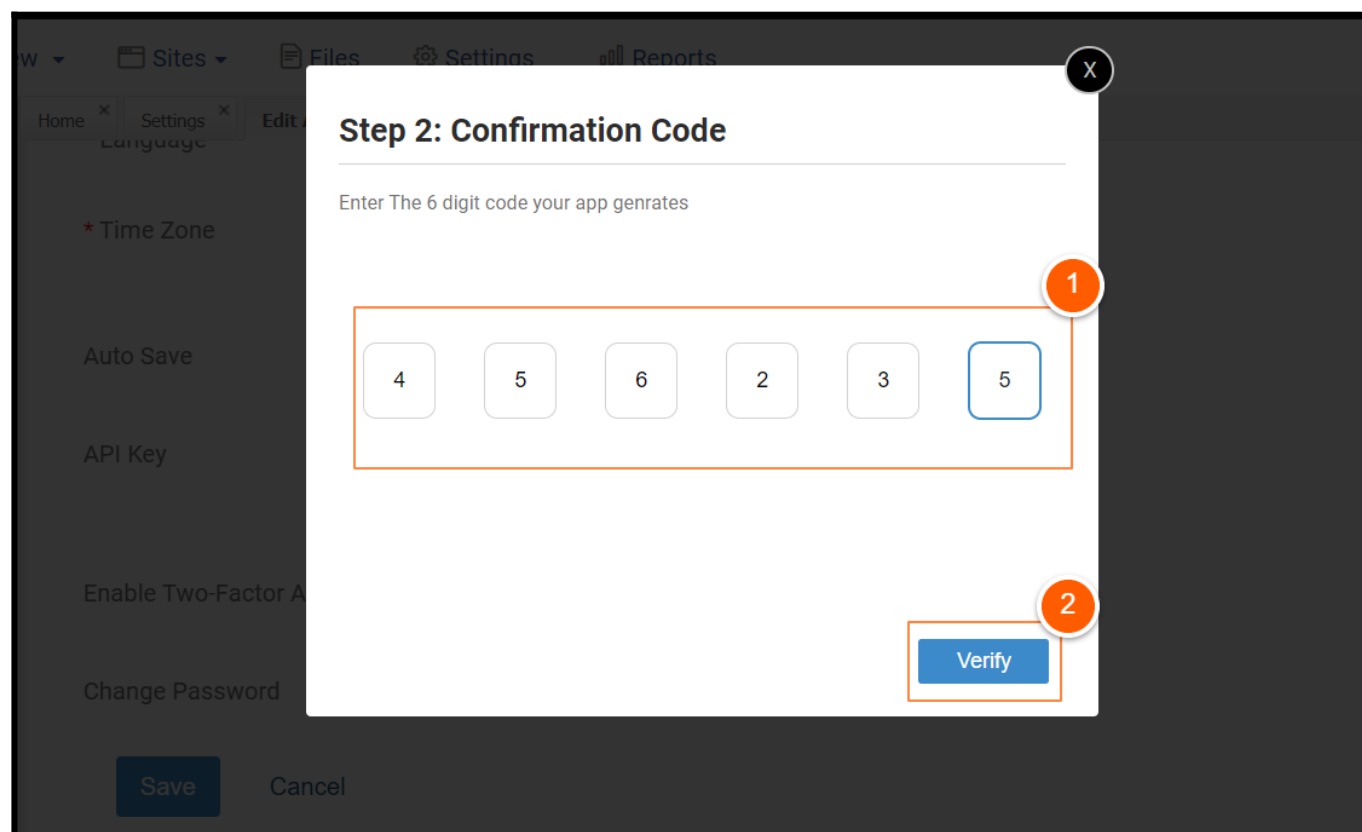
The screenshot shows the 'Edit Account' settings page. The 'Enable Two-Factor Authentication' option is set to 'Yes', which is highlighted with a red box and a red circle containing the number '1'. The 'Save' button at the bottom left is highlighted with a red box and a red circle containing the number '2'. Other settings visible include Time Zone (UTC -8:00), Auto Save (Yes), and API Key (Generate Key button).

**Step 3:** To verify, install [Google Authenticator](#) from the [Play Store](#). After installing, scan the QR code and click **Next**.

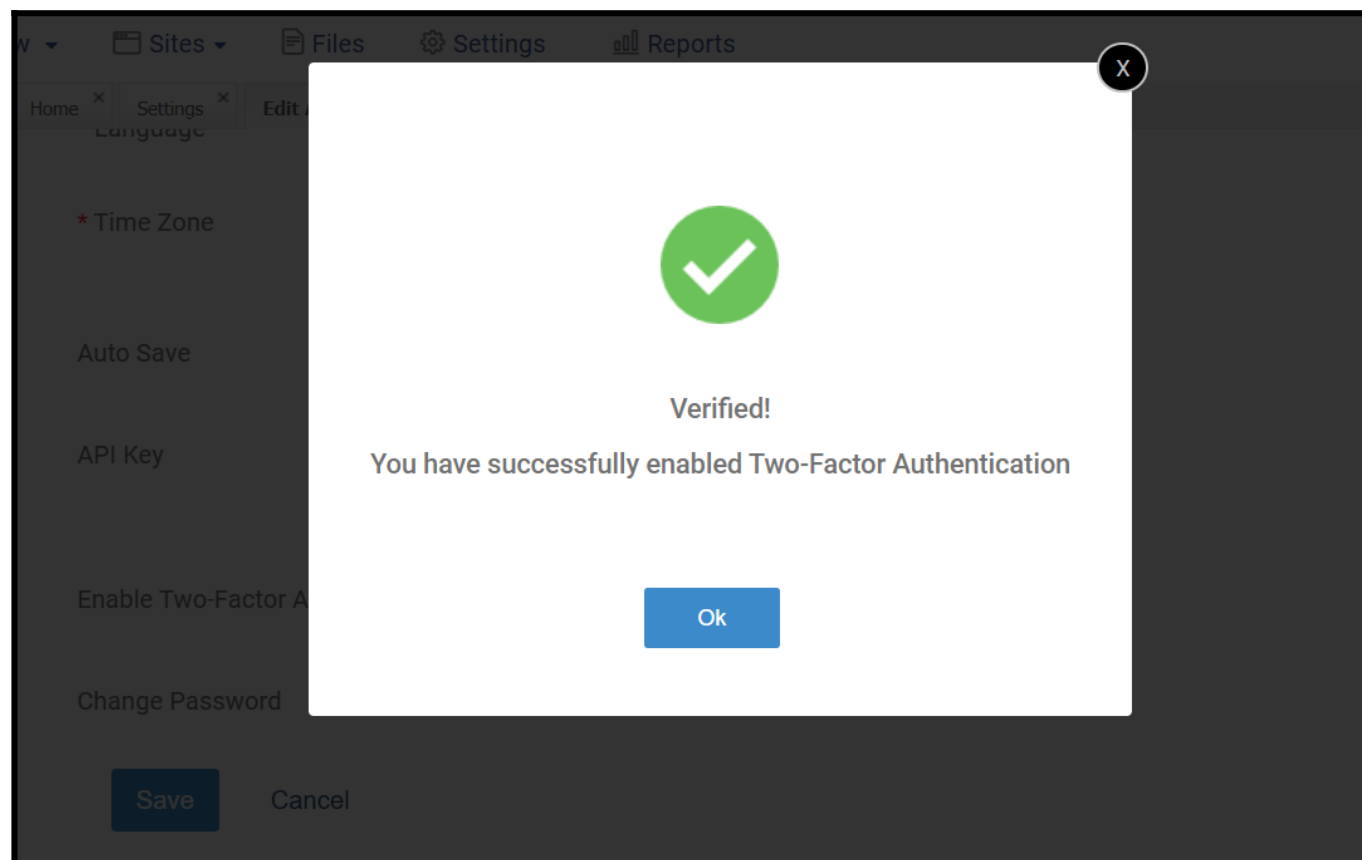
The screenshot shows a modal dialog titled 'Step 1: Configure the App'. It contains a note: 'Note : Install the google authenticator app on your smartphone or tablet, then scan the QR code below. You may also input this secret key'. Below the note is a QR code, which is highlighted with a red box and a red circle containing the number '1'. At the bottom right of the dialog is a 'Next' button, highlighted with a red box and a red circle containing the number '2'. The background shows the 'Edit Account' settings page from the previous screenshot.

**Step 4:** Enter the six-digit code received on your mobile app and click **Verify**.





**Step 5:** Click **Ok** to confirm the successful verification.



Two-factor Authentication is successfully enabled on your Knowledge Base account.

**NOTE:** Two-Factor Authentication applies to a single user only.

So, the next time you log in to your ProProfs Knowledge Base, you will be prompted to log in using the Two-Factor Authentication.

*That is all about enabling the Two-factor Authentication on your ProProfs Knowledge Base.*

### Related Articles:

- [Add, Edit, and Delete Users](#)
- [Restricting Access to Logged-in Zendesk Users](#)
- [How to Log in and out of ProProfs Knowledge Base](#)

# Roles & Permissions

**Roles & permissions** give your company the ability to **control** and **assign** what users can and cannot do in [ProProfs](#). You can **assign** every user in ProProfs a role when you add them.

***Learn more about adding users.***

Assigning different roles lets you:

1. **Assess** user performance based on tasks assigned
2. **Streamline** the workflow

ProProfs has these pre-defined roles:

- **Administrator** - Administrators have **access** and can make changes to **all features** and **settings**.
- **Editor** - Editors can **publish** and **manage** pages but **cannot** change the **settings**.
- **Contributor** - Contributors can **write** or **edit** pages but **cannot delete** or **publish** them. **Neither** can they access the **settings**.
- **Viewer** - Viewers can **only view** the content, similar to logged-out users. This role is designed for [private sites](#).
- **Group Admin** - Group administrators can **only view** the users added to their **group**. They can view their **roles** and **status** but **cannot** perform any **actions**.

Each role can perform a particular set of tasks, called '**Permissions**.'

Here's the permissions chart for each role:

Permissions	Administrator	Editor	Contributor	Group Admin
Add New Folders	✓	✓		✓
Delete folders	✓	✓		✓
Edit Folders	✓	✓		✓
Add Pages	✓	✓	✓	✓
Edit Pages	✓	✓	✓	✓
Publish Pages	✓	✓		✓
Delete Pages	✓	✓		✓
View All Pages	✓	✓	✓	✓
Add Tooltips	✓	✓	✓	✓
Edit Tooltip	✓	✓	✓	✓
Delete Tooltip	✓	✓		✓
Access Settings	✓			


## Limit Site Access

When [adding/editing](#) users, you can limit which sites they can access. This option allows you to

restrict a user's access to certain sites.

Sites

The user is NOT allowed to access these sites :



- ☐ Help Site - English - (United States) (default)
- ☐ Webdocs - English - (United States)
- ☐ Acme help - English - (United States)
- ☐ Acme 2 - English - (United States)
- ☐ Acme 3 - English - (United States)
- ☐ Acme corp - English - (United States)

An email will be sent to the user with instructions on how to activate their account

Create

Cancel

**Note:** By default, a user is allowed to access all sites. To restrict a user from accessing a certain site, click the box next to the desired site (the box will show a checkmark next to the restricted site).

### Related Articles:

- [Add, Edit, Delete Users](#)
- [How Do I Delete Users and Their Information?](#)
- [Workflow Rules](#)

# How to Create Workflow Rules

You can set-up a review process and workflows to easily track an article from the time it's first created to the multiple review cycles it undergoes, right up to the time it is published.

A typical workflow can have 4 to 5 statuses :

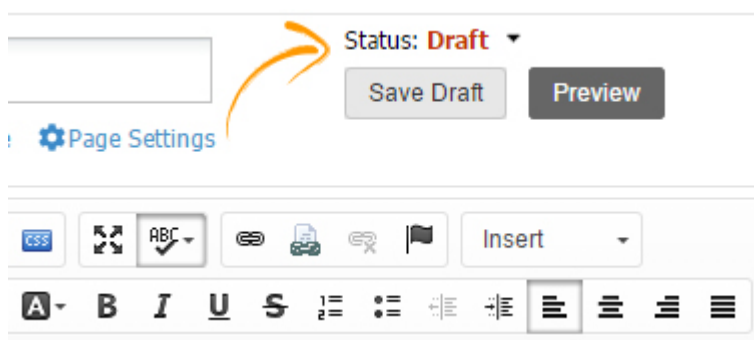
1. [Draft](#)
2. [In Progress](#)
3. [Ready for Review](#)
4. [Custom Status](#)
5. [Published](#)

## Why use workflows?

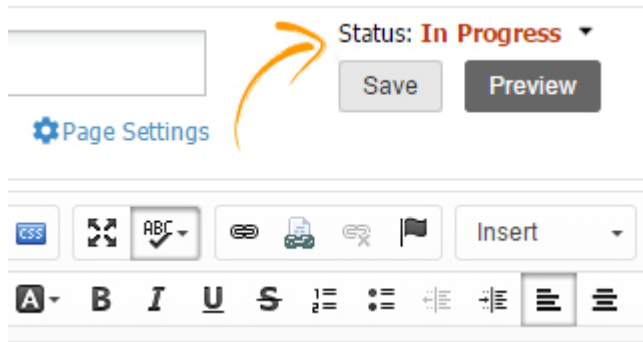
You can use the workflow rules and approval processes to ensure the content in your knowledge base articles is relevant, accurate and helpful. Workflows help your organization automate the task of managing work collaboratively with a team of contributors, editors and administrators.

## 5 key workflows statuses explained

**1) Draft** - This is the default status of an article as soon as you create a new page. The draft page is not visible to readers and you can use it to outline your ideas and create a working draft of the article.

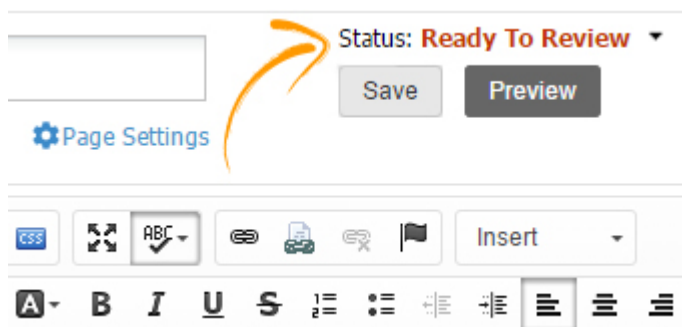


**2) In Progress** - Mark the status of an article as "In Progress", if it is still being created but is more than just an outline. During this stage, you can brainstorm with your colleagues and include their ideas into the article.

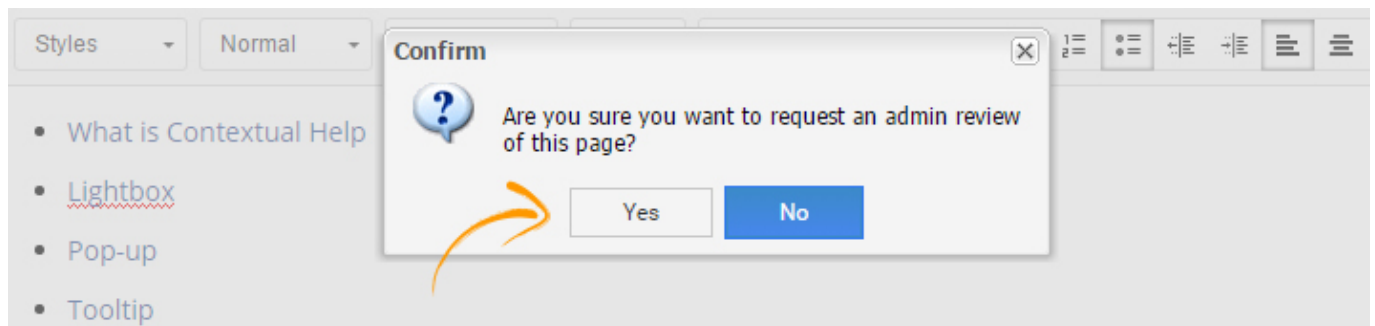


**3) Ready for Review** - Once you're done creating the article, you can request the administrator for a review by changing the status to "Ready for Review".

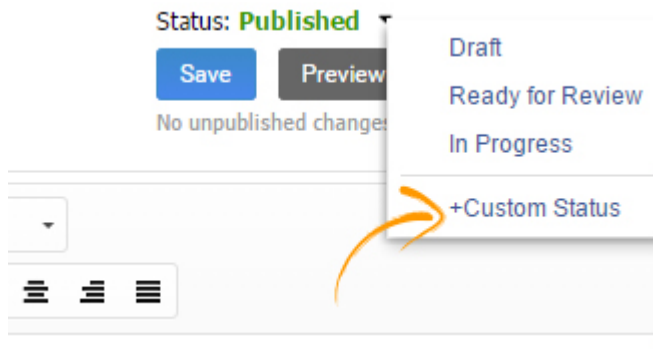
**Note\*** - As soon as you change the status of an article to "Ready for Review", then a notification is automatically sent to the administrator .



You will be prompted to confirm the request for a review from the admin. Select "Yes" to confirm your request.



**4) Custom Status** - You can also create a custom status for articles and pages by clicking on Custom Status. This is where you can use workflow rules in tandem with the [member manager](#) function, and assign/request contributions or reviews from an individual member or entire groups/teams.



A custom status is basically one that is not a pre-defined status such as "Draft", "In Progress", "Ready for Review" or "Published". For instance, you can mention the name of a specific team or a member from whom you want the page to be reviewed, as shown in the example below.

### Custom Status

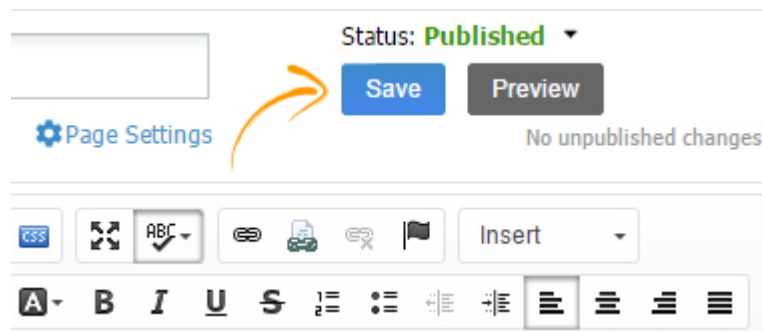
[+ Add New Status](#)

Note : Write a custom status in the left box and choose a group member from the adjacent box to notify the selected member via email.

*Add the status and assign it to a member or team*

*Click on Save*

**5) Published** - This is the final stage where the administrator reviews and publishes the help article so that it's available for the target audience.



#### Related Articles:

[Add, Edit, Delete Users](#)

[How Do I Delete Users and Their Information?](#)

[Roles & Permission](#)



# Member Manager

With the Member Manager, you can add new users and manage their [permissions and roles](#). You can also organize them into groups or teams and manage group permissions. Additionally, you can [control access of users and groups to content](#) in your knowledge bases.

There are the following ways to manage your knowledge base members:

- [Add and manage users](#)
- [Create and manage groups](#)
- [How to Manage Bulk Uploads](#)
- [Create a Group Admin](#)

How to add and manage users

**Step 1:** Go to **Settings** and click on **Users**.



**Step 2:** Click on **New User**.

Status		<a href="#">+ New User</a>	
✓ Active			
✓ Active	✗ <a href="#">Make inactive</a>   <a href="#">Delete</a>   <a href="#">Invite Again</a>		
✓ Active	✗ <a href="#">Make inactive</a>   <a href="#">Delete</a>   <a href="#">Invite Again</a>		
✓ Active	✗ <a href="#">Make inactive</a>   <a href="#">Delete</a>   <a href="#">Invite Again</a>		

**Step 3:** Add the details of the user such as name, email, language, and time zone. You can also upload user details from an excel file.

You can also assign roles such as contributor, editor, administrator, and control which help sites the user can or cannot access.

## Add User [← back to settings](#)

\* Name

\* Email   
This will be their username

\* Roles  [Learn more](#)

\* Language

\* Time Zone   
☐ Day Light Savings Time

Sites  
The user is NOT allowed to access these sites :

- ☐ Help Site - English - (United States) (default)
- ☐ Webdocs - English - (United States)
- ☐ Acme help - English - (United States)
- ☐ Acme 2 - English - (United States)
- ☐ Acme 3 - English - (United States)
- ☐ Acme corp - English - (United States)

Or

Upload from Excel



An email will be sent to the user with instructions on how to activate their account

## How to create and manage groups

**Step 1:** Go to the **Users** section under settings and click on the **Groups** Tab. If you don't already have a group Click on **First Group** to start creating a group, you can also click on the **New Group** button at the top right to create a new group anytime.

### Groups [<< back to settings](#)

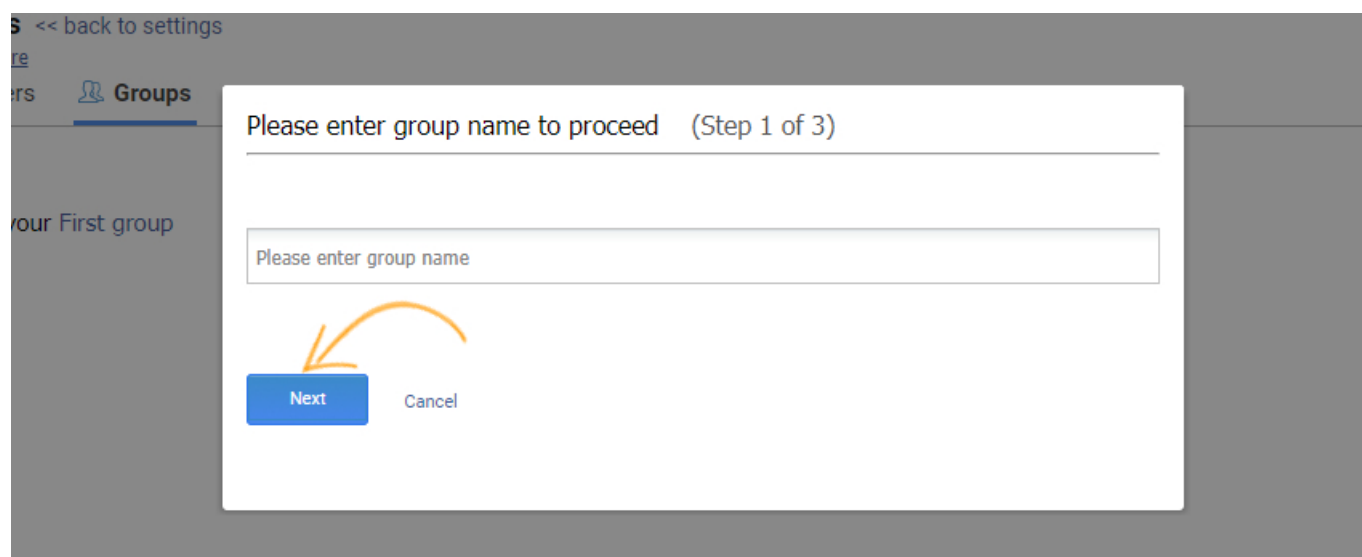
[Learn more](#)

[Users](#) [Groups](#)

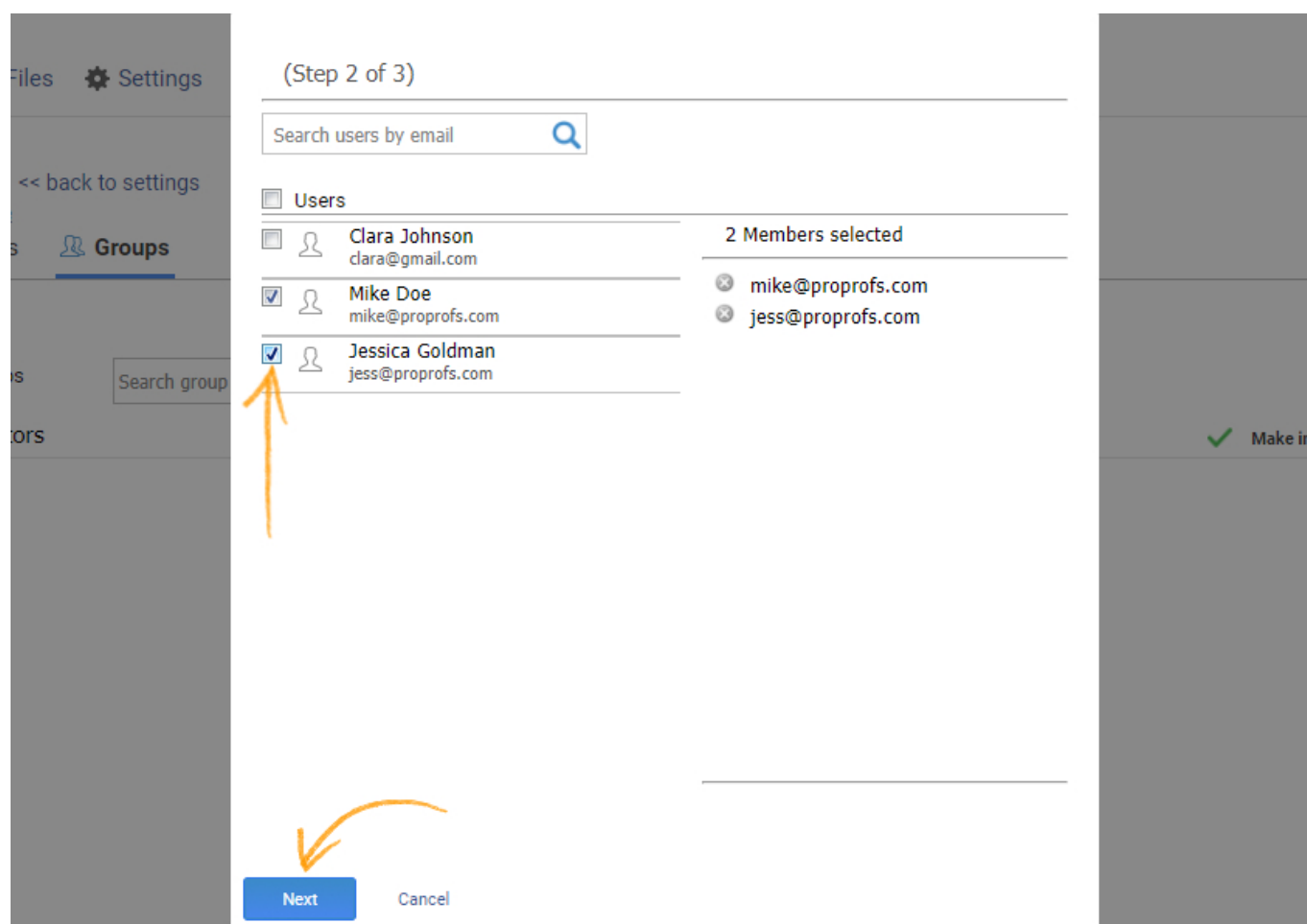
[+ New Group](#)

Create your **First group**

**Step 2.** When you click on the create group button, a pop-up will load up. Enter the name of the group and click **Next**.



**Step 3:** Add members to the group from the list of existing users. Then, click on Next.



Once you have completed and saved all the steps above, you can efficiently manage and collaborate with multiple writers and editors to [create your knowledge base](#).

If you wish to change the group you created, like removing or adding users, changing the group name, or altering user roles, click **Edit** under the group name.

## Groups << back to settings

[Learn more](#)

[Users](#) [Groups](#)

[+ New Group](#)

☐ Groups

Search group



Status

☐ Editors  
Edit | Copy

Active

☒ Make inactive

## How to Manage Bulk Uploads

You can add users in bulk with excel sheets. You can follow the template given below to add multiple users to a single website.

	A	B	C	D	E	F
1	First name	Last name	Email	Role	Group (Optional)	Access Sites (0 => No 1 => Yes)
2	John	Smith	<a href="mailto:john@sample.com">john@sample.com</a>	Editor	Design	0
3	John	Smith	<a href="mailto:john@sample.com">john@sample.com</a>	Admin	Development, Design	1
4	John	Smith	<a href="mailto:john@sample.com">john@sample.com</a>	Viewer	Product	0
5	John	Smith	<a href="mailto:john@sample.com">john@sample.com</a>	Contributor	SEO	1
6						
7						
8						
9						
10						

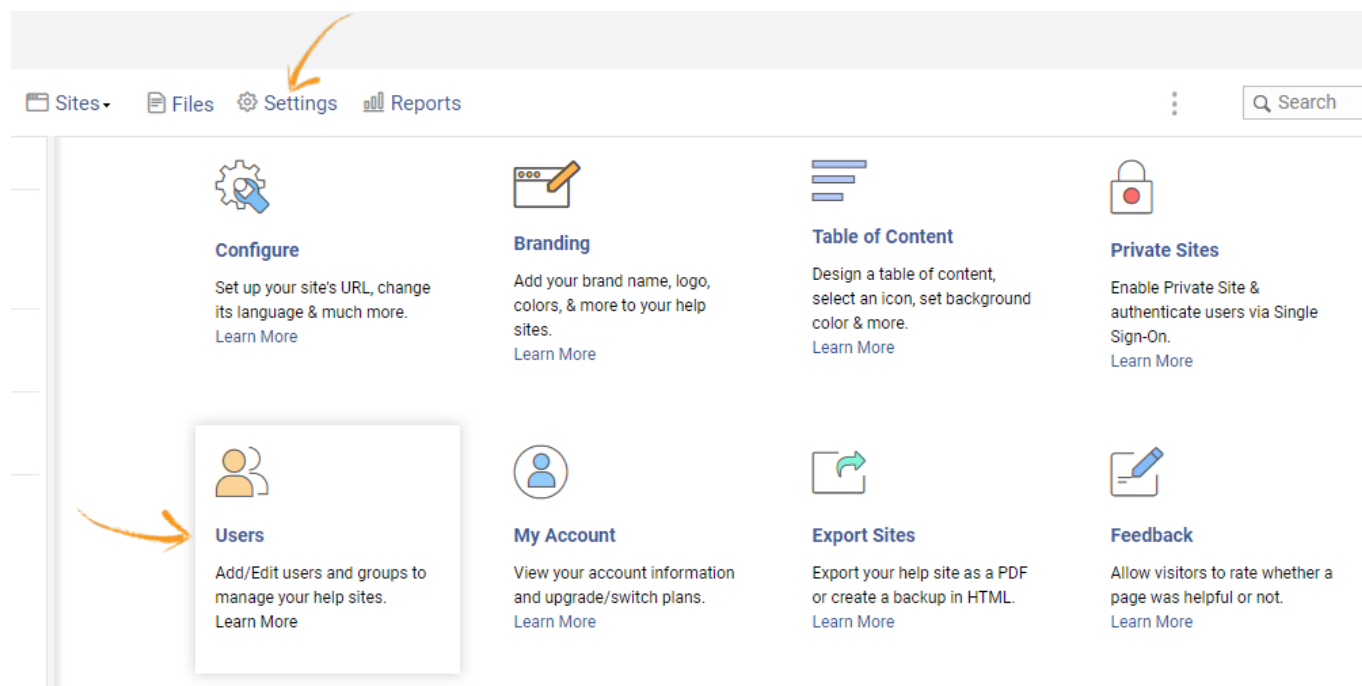
To give user access to your website, define the **Access Site** field with 1. The number 0 adds a user but does not give him access.

If you have multiple sites and want to give access to users separately, add the users in groups, and provide access to the groups. An example template is given below. Group access will always override user access. The template below will add users to groups that handle different websites. Then, the defined users will be added to groups that can be given access as per requirement.

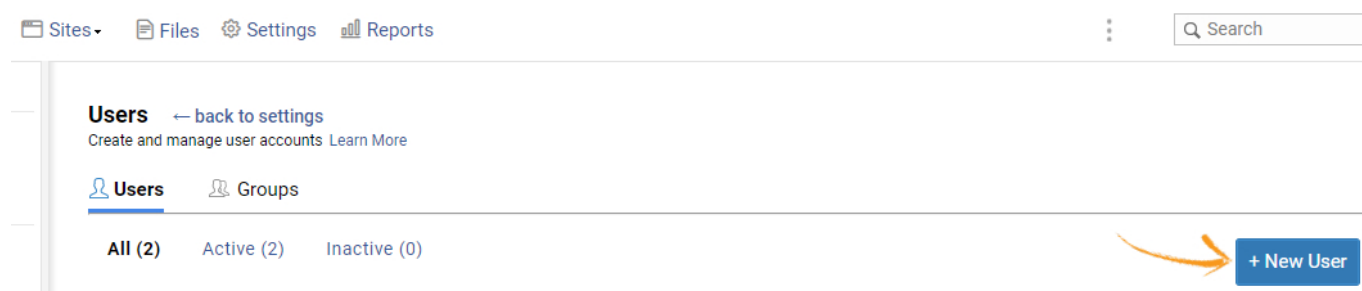
Users	Helpsites	Groups			
1	A, B	Design, Development,			
2	B	Development			
3	A, E	Design, Product			
4	B, C	Development, SEO			
5	A, B, C, D	Design, Development, SEO, Content			
6					
First name	Last name	Email	Role	Group (Optional)	Access Sites (0 => No 1 => Yes)
1		<a href="mailto:1@sample.com">1@sample.com</a>	Editor	Design, Development,	0
2		<a href="mailto:2@sample.com">2@sample.com</a>	Admin	Development	0
3		<a href="mailto:3@sample.com">3@sample.com</a>	Viewer	Design, Product	0
4		<a href="mailto:4@sample.com">4@sample.com</a>	Contributor	Development, SEO	0
5		<a href="mailto:5@sample.com">5@sample.com</a>	Admin	Design, Development, SEO, Content	0
6		<a href="mailto:6@sample.com">6@sample.com</a>	Editor		1

## How to Create a Group Admin

**Step 1:** From your ProProfs Knowledge Base dashboard, go to **Settings >> Users**.



**Step 2:** Click **+New User**.



**Step 3:** Fill the required details and make this user the **Group Admin** from the **Roles** dropdown. If you want, you can upload users in bulk using **Microsoft Excel**.

**Add User** ← back to settings

\* Name

\* Email   
This will be their username

\* Roles  Learn  
More  
Select Group

\* Language

\* Time Zone   
☐ Day Light Savings Time

Or

Upload from Excel

Microsoft Excel

Email Notification Template

**Step 4:** Scroll down to the bottom and click **Create** to finish the process of adding a new user.

**Create** Cancel

Another way of assigning a group admin is, instead of adding a new user, do the following:

**Step 2.1:** Go to the **Groups** tab and click **+ New Group**.

Sites Files Settings Reports

**Groups** ← back to settings  
Learn more

Users **Groups**

**+ New Group**

**Step 2.2:** Enter a group name and click **Next**.

**Name your group (Step 1 of 4)**

Group Name

**Next** Cancel

**Step 2.3:** Select a user as the group admin and click **Next**.

The screenshot shows a dialog box titled "Add Admin to this Group (Step 2 of 4)". At the top is a search bar with the placeholder text "Search users by email" and a magnifying glass icon. Below the search bar is a list of users. The first user is selected, indicated by a radio button and a person icon. An orange arrow points to this selected user. At the bottom of the dialog are two buttons: "Next" (highlighted in blue) and "Cancel". Another orange arrow points to the "Next" button.


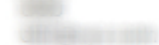
**Step 2.4:** Add users to the group and click **Next**.




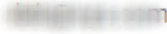
(Step 3 of 4)


Search users by email

☐ Users

☒  

1 Members selected



**Step 2.5:** There are two ways to define the role of your users, as shown below:

- **Follow roles** - Define roles to individual users.
- **Override old roles** - Define a role to the entire group.

### Define their role

☐ Override old roles ☒ Follow roles

List of users already have roles assigned.

Email ID	Permission
example.com	<div><div>Contributor</div><div>Viewer</div><div>Contributor</div><div>Administrator</div><div>Editor</div></div>

Next

Cancel

**Step 2.6:** Select the help sites your users/group can access and **submit**.

☐ **Sites**

☐ healthcare-demo - English - (United States)

☐ online-help-manual-test - English - (United States)

☐ user-guide-demo - English - (United States)

☐ software-documentation-demo1 - English - (United States)

☐ employee-handbook-demo - English - (United States)

☐ software-company-demo - English - (United States)

☐ help-center-demo - English - (United States)

☐ Company-Knowledge-Base - English - (United States)

☐ online-documentation - English - (United States)

☐ training-manual-demo1 - English - (United States)

☐ Training mauanl-Ankit - English - (United States)

☐ it-help-center - English - (United States)

☐ product-documentation - English - (United States)

☐ Training documentation demo - English - (United States)

Submit

Cancel

### Related Articles:

[Add, Edit, Delete Users](#)

[How Do I Delete Users and Their Information?](#)

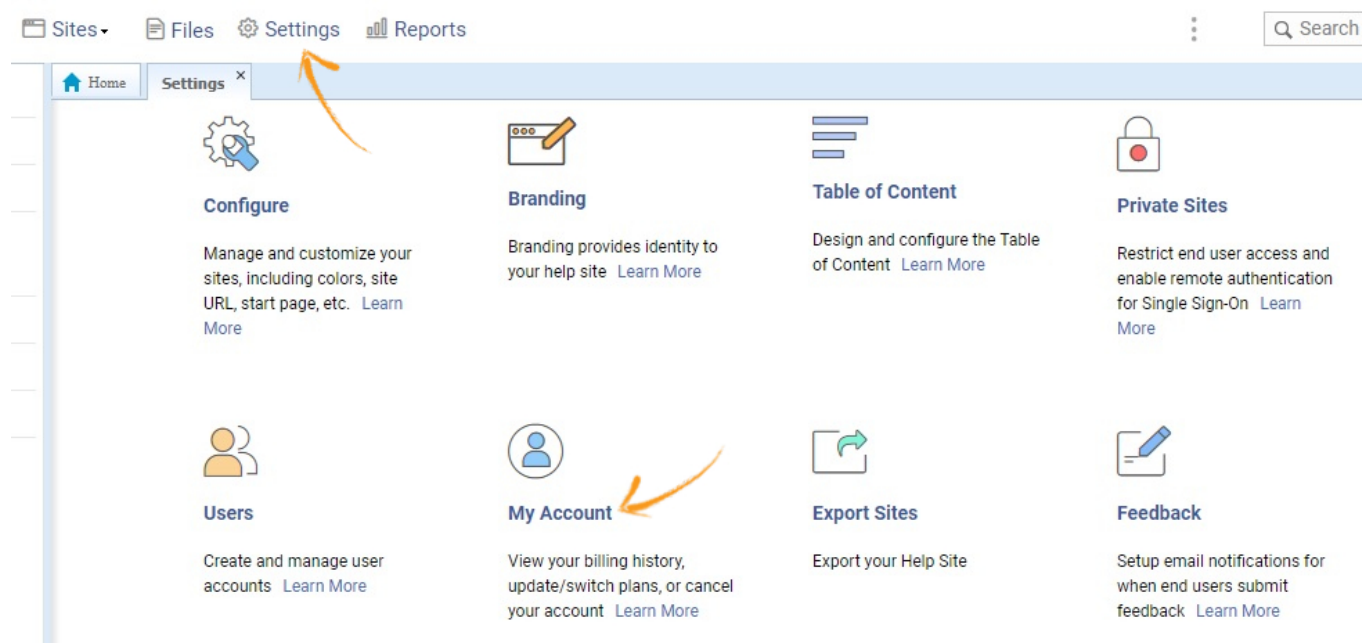
[Roles & Permission](#)

# How to View and Manage My Account

My Account option lets you view the details of your Knowledge Base account and enables you to upgrade your subscription plan as well.

Here's how you can view and manage My Account:

**Step 1:** On your ProProfs Knowledge Base dashboard, click **Settings** and then **My Account**.



**Step 2:** The **Manage Account** screen shows the most important info about your account such as Account ID, Company Name, Plan, Status, and more. Click **Edit** to make changes to your company name and the website URL. If you wish to change your plan, click **Upgrade**.

**Manage Account** ← back to settings  
View your billing history, update/switch plans, or cancel your account [Learn More](#)

Account ID 23161  
Company Name fgvhbkj  
Web Site

[Edit](#)

[Upgrade](#)

Plan 15 days free trial  
Status Free trial active  
Users 1 of 200  
Pages 13 of 300  
Sites 1 of 100  
Storage 2KB (0%) of 6GB

**Step 2.1:** Edit your company details if required and **Save**, else, **Cancel**.

**Edit Company Details** ← back to settings

\* Company Name

Web Site URL

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

**Step 2.2:** Back on the **Manage Account** screen, clicking **Upgrade** takes you to the Knowledge Base pricing page. Here, you can change your subscription by clicking **Upgrade** below the plan of your choice.

MONTHLY ☒ YEARLY(Discounted)

FREE

\$0

ESSENTIALS

\$0.20 Page/month  
(billed annually)

Build a public knowledge base to support customers.

Upgrade

200 Pages ▾

~~\$480/Year~~ **\$384/Year 20% off**

Most Popular

PREMIUM

\$0.40 Page/month  
(billed annually)

Build unlimited public or private knowledgebases with secure access. Includes advanced features such as API, white label & more.

Upgrade

200 Pages ▾

~~\$960/Year~~ **\$768/Year 20% off**



20

# Import & Export

# How to Import Data From Zendesk to ProProfs Knowledge Base

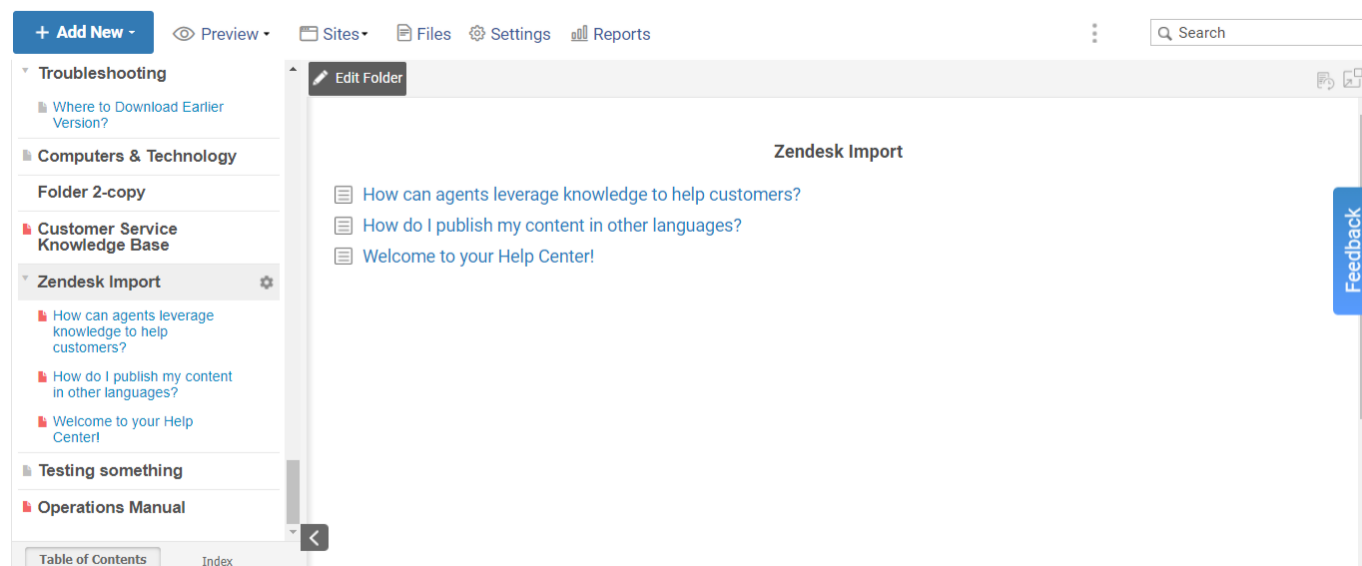
[ProProfs Knowledge Base](#) is a comprehensive software product to develop a rich online knowledge platform comprising an online knowledge base, user manuals, documentation, & more.

Its underlying technology lets you smoothly migrate data from Zendesk to the ProProfs Knowledge Base.

The easy importing of data allows you to:

- **Develop an enriching knowledge base by migrating the help articles from your Zendesk Account as they are**
- **Leverage the features of ProProfs Knowledge Base in creating, launching & organizing help articles**

Below is an overview of how imported articles from Zendesk will show up in your ProProfs Knowledge Base account:

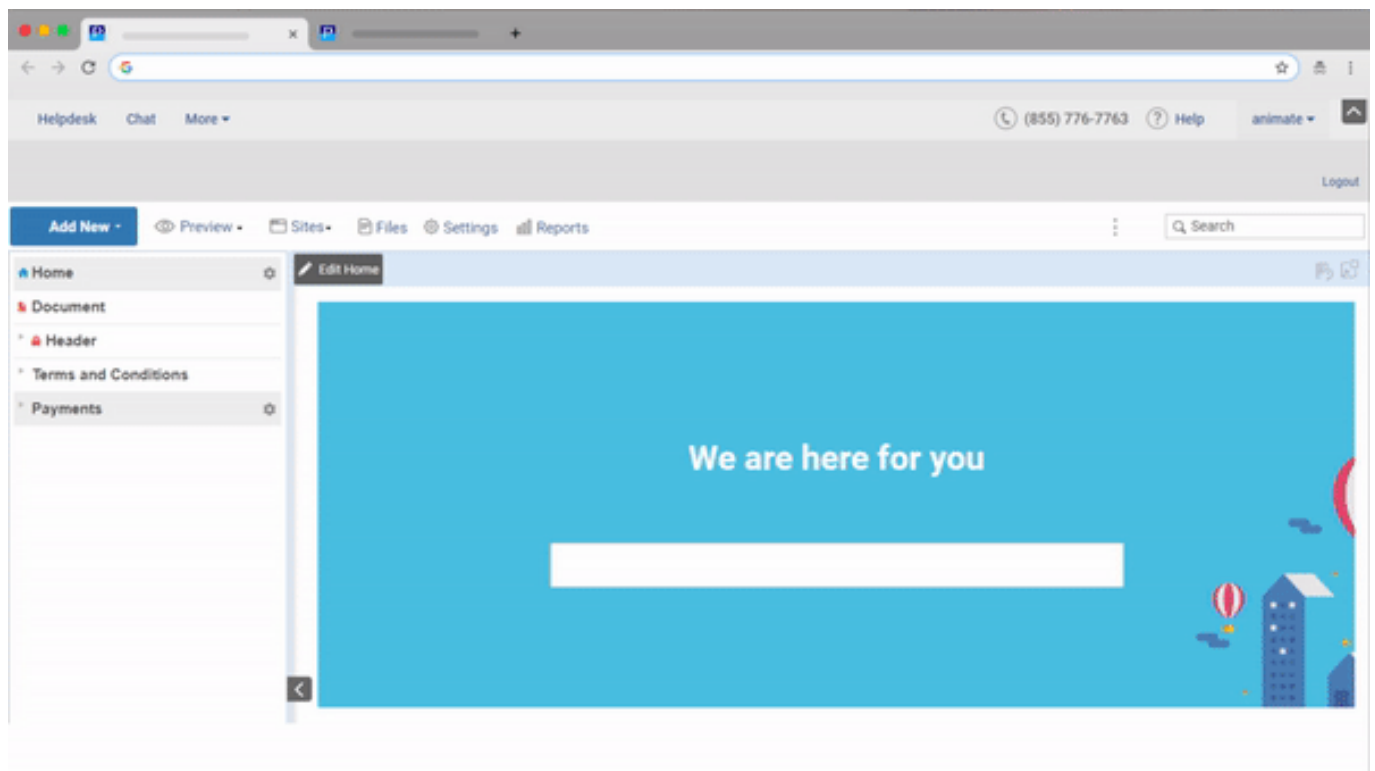


Here's how you can import articles from Zendesk:

**Step 1:** In your ProProfs Knowledge Base account,

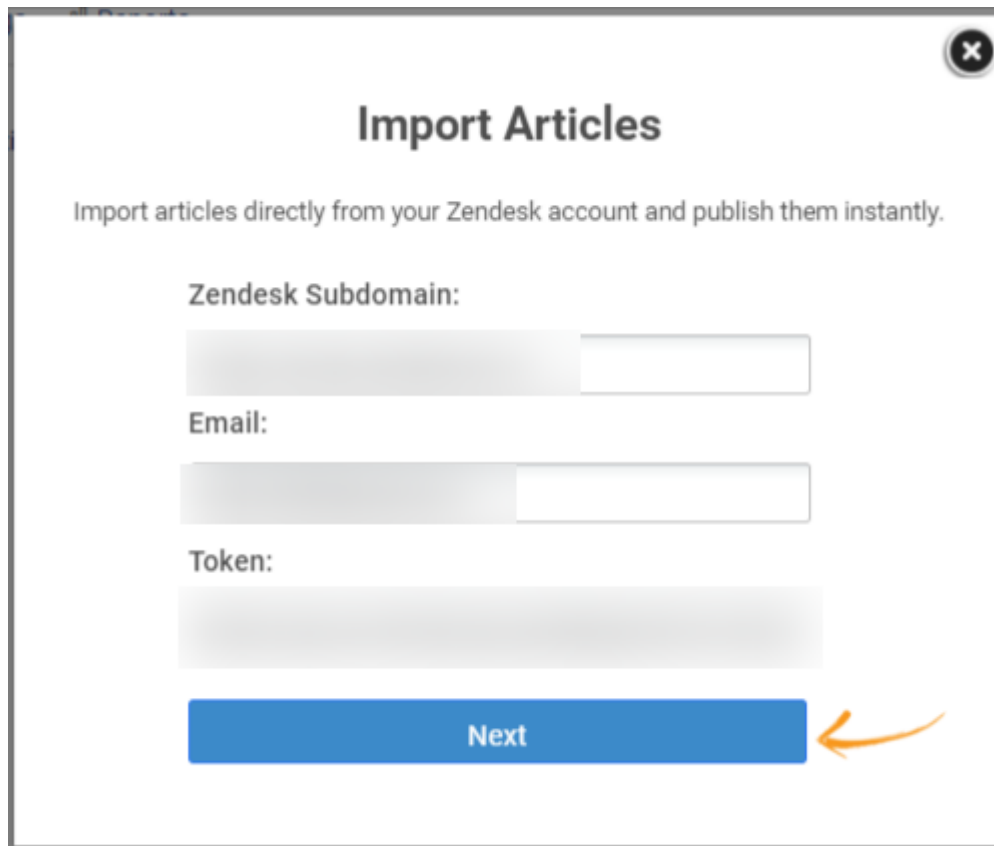
- Navigate to **Settings >> Import Files**
- Click '**Import From Zendesk.**' A popup window opens.





Here you will find three fields.

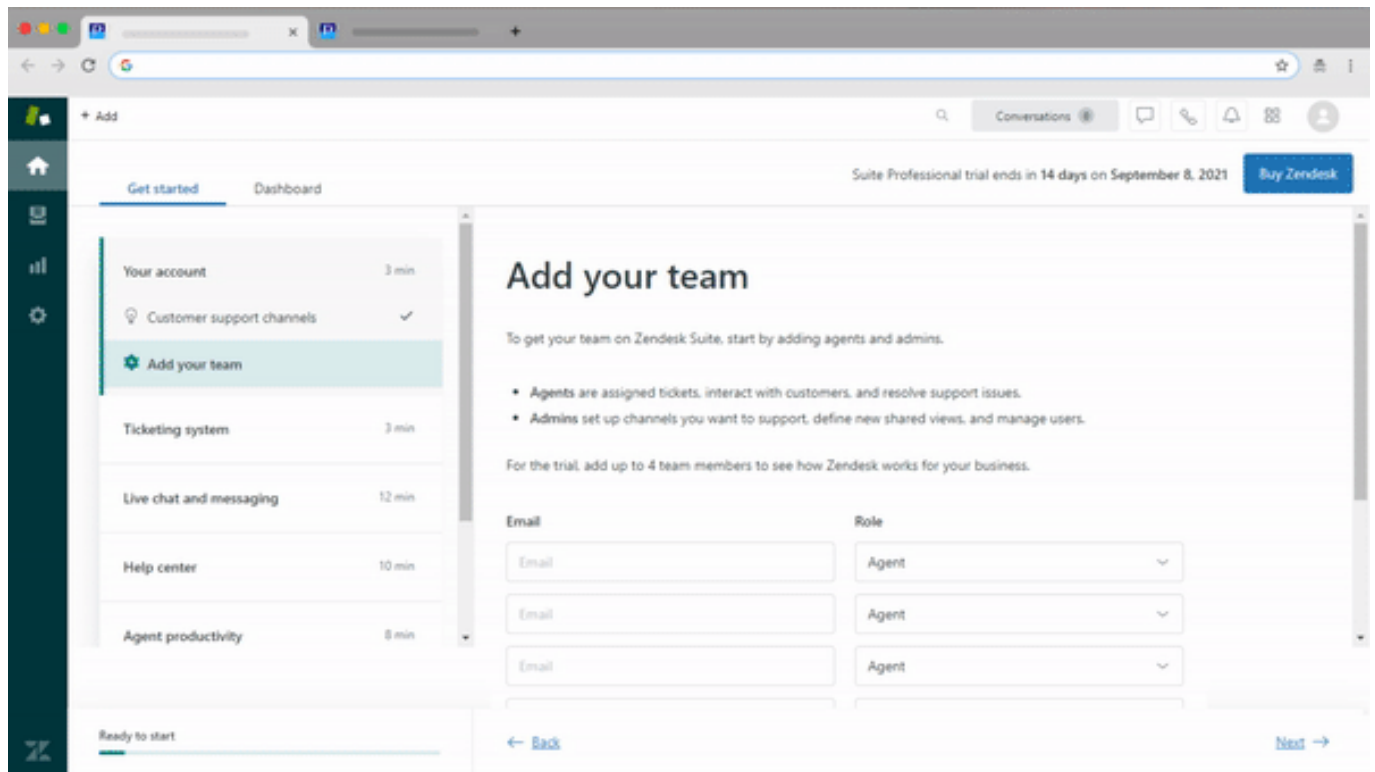
- **Zendesk Subdomain:** This is your Zendesk help site domain. For example, <https://yoursubdomain.zendesk.com>.
- **Email:** This is the email address associated with your Zendesk account
- **API token:** You can find the Token in the Zendesk settings, as explained below in detail.



The screenshot shows a modal window titled "Import Articles" with a close button in the top right corner. Below the title is a subtitle: "Import articles directly from your Zendesk account and publish them instantly." The form contains three input fields: "Zendesk Subdomain:", "Email:", and "Token:". Each field has a greyed-out placeholder and an active text input area. At the bottom is a blue "Next" button, which is highlighted by an orange arrow pointing to it from the right.

**Step 2: Log in** to your **Zendesk** account and follow the steps below to gather details to enter into your **ProProfs Knowledge Base** account,

- On the left panel, navigate to **Admin >> Channels**
- Click '**API.**'



### Step 3:

- Enable **Token Access**

#### Token access ⓘ

We recommend that you use API tokens to keep your agents' passwords safe. When authenticating with tokens, add /token to the end of your username.

Disabled 

Active API tokens (2)

Add API token

API token access is currently disabled.

- Click **Add API Token**

#### Token access ⓘ

We recommend that you use API tokens to keep your agents' passwords safe. When authenticating with tokens, add /token to the end of your username.

Enabled 

Active API tokens (2)

Add API token

- Enter the **API token description** and copy the API token as mentioned. Click **Save**.

**Zendesk** Never used Delete

API token description (optional)

Zendesk

API token

IAITML3g6UQBqbGVV6TF1q7fLObn76Wmh1ER2NWa Copy

⚠ Make sure to copy and store this token. We won't show it again after you click Save or leave this page.

Close Save

**Step 4:** Return to your ProProfs Knowledge Base account,

- Enter the following details in the popup window:

✕

## Import Articles

Import articles directly from your Zendesk account and publish them instantly.

Zendesk Subdomain:

Email:

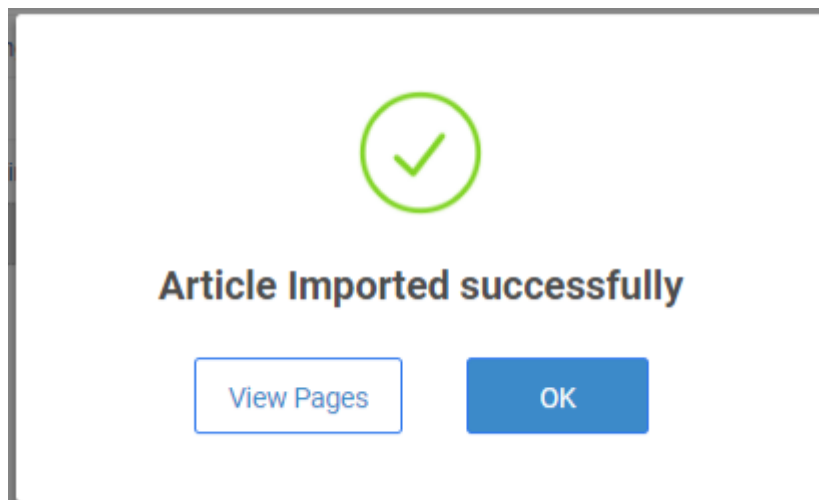
Token:

Next

- Click '**Next.**' On the next page, you will see a list of articles associated with your Zendesk account.

Page List	Action
How can agents leverage knowledge to help customers?	<a href="#">Import</a>
How do I publish my content in other languages?	<a href="#">Import</a>
How do I customize my Help Center?	<a href="#">Import</a>
What are these sections and articles doing here?	<a href="#">Import</a>
Welcome to your Help Center!	<a href="#">Import</a>

- Click **Import** to add your article to your ProProfs Knowledge Base account. Once done, you will see the following message.



- You can click '**View Pages**' to view the newly imported articles. All your imported articles will appear in a folder named '**Zendesk Import,**' as shown on the left panel.

The screenshot displays the ProProfs Knowledge Base interface. At the top, there is a navigation bar with buttons for '+ Add New', 'Preview', 'Sites', 'Files', 'Settings', and 'Reports'. On the left side, a sidebar shows a list of folders, including several 'Untitled' folders, 'Folder 2-copy', 'Customer Service Knowledge Base', and 'Zendesk Import'. An orange arrow points to the 'Zendesk Import' folder. The main content area is titled 'Edit Folder' and shows a list of articles imported from Zendesk: 'How can agents leverage knowledge to help customers?', 'How do I publish my content in other languages?', and 'Welcome to your Help Center!'. At the bottom of the sidebar, there are buttons for 'Table of Contents' and 'Index'.

*You have successfully imported files from your Zendesk account to your ProProfs Knowledge Base account.*

### Related Articles:

- [Google Analytics Integration With ProProfs Knowledge Base](#)
- [Wufoo Forms Integration With ProProfs Knowledge Base](#)
- [How to Integrate Slack With ProProfs Knowledge Base](#)

# Import From Madcap Flare

Follow these steps to import a Madcap Flare project into ProProfs.

1. Export your Madcap help as HTML. Flare allows output to several types including DotNet Help, HTML Help, WebHelp, WebHelp AIR, WebHelp Mobile, WebHelp Plus. Make sure you output your site as **HTML Help**.
2. Locate the files on your computer. Select all the files you want to zip. Right-click on any of the files (making sure all the files are still selected), select **Send To**, and another box will open. Click **Compressed (zipped) Folder**. A new folder with a zipper image on it will appear in the same general area (i.e., the desktop or folder in which the original item was saved). This is your new zip file/folder.
3. [Follow these steps](#) to begin the import process.

**Note:** It is recommended that you **delete** any files or directories out that are related to the skin of the Madcap site.

## Related Articles:

[Importing Content Into KnowledgeBase](#)

[Import From Robohelp](#)

[Import From FrameMaker](#)

# Import PowerPoint (PPT)

You can import PowerPoint presentations (PPT) as an HTML file into ProProfs. If you don't have the HTML file ready, you can easily convert a PPT into an HTML file using OpenOffice.

If you don't have OpenOffice installed, visit [OpenOffice.org](http://OpenOffice.org) and follow the installation instructions to set up the software.

Launch OpenOffice to convert your presentation into an HTML file. Please [read this help article](#) to see the steps.

Once you have the HTML file with you, follow the steps mentioned in this article: [Importing Content into ProProfs](#)

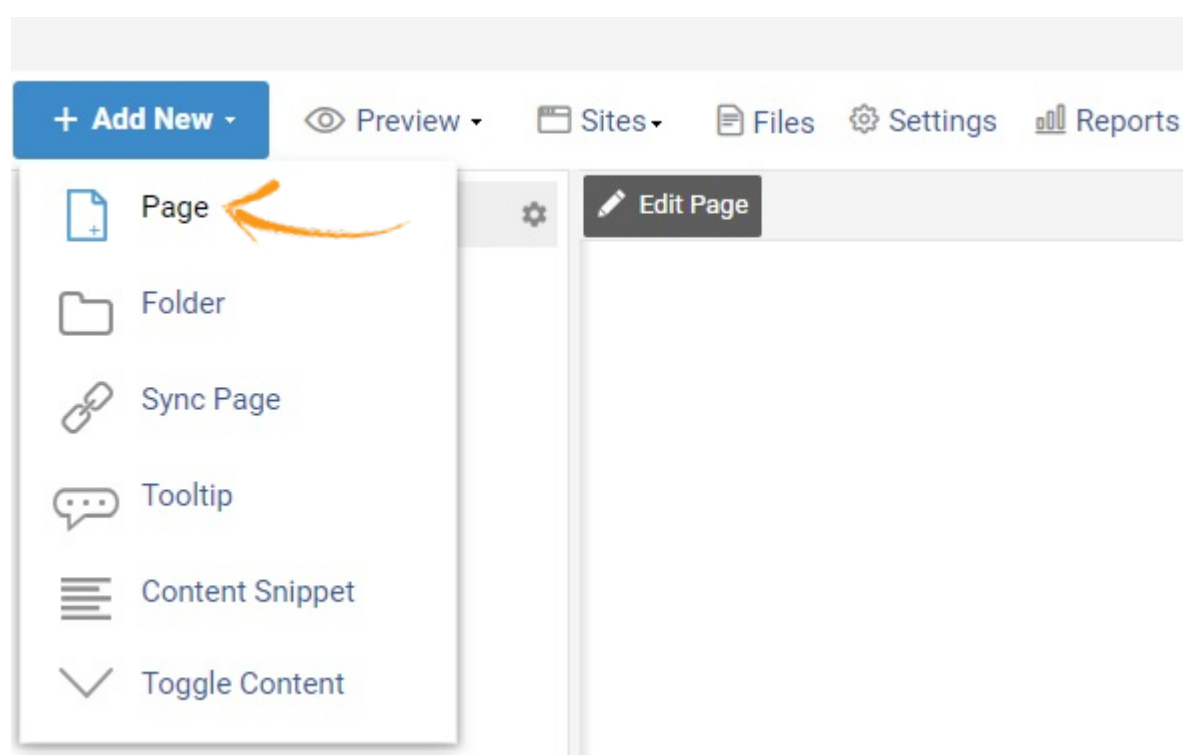


# Import From PDF

With ProProfs Knowledge Base, you can now import your PDF content into the help site. All your PDF files can be seamlessly incorporated as individual pages and you won't have to worry about manually building dedicated help pages for each Word doc. It is simple, quick, and enables a smooth transition towards using a centralized repository of information.

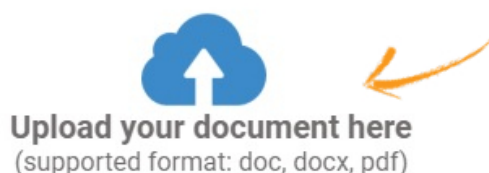
## Here's how you can import a PDF doc directly into the Knowledge Base

**Step 1:** On your **ProProfs Knowledge Base** dashboard, click on the **+ Add New** button and select **Page**.

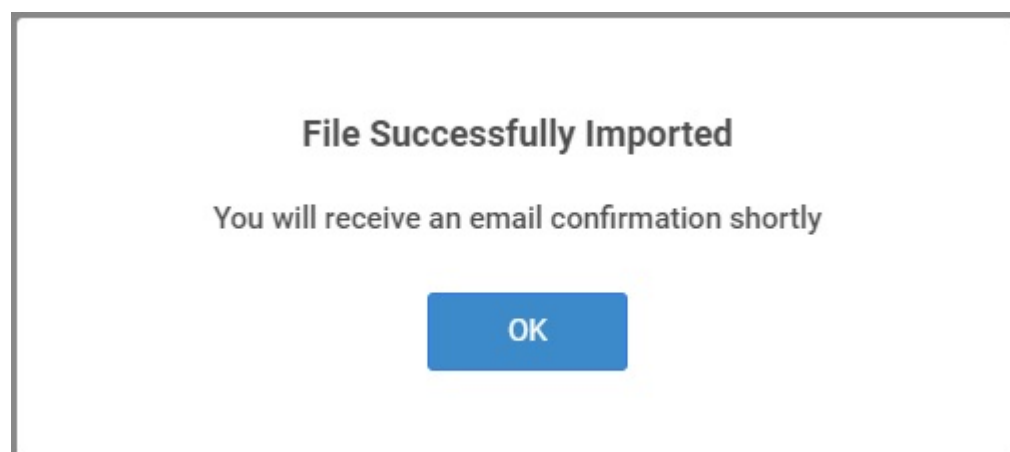


**Step 2:** Navigate to the **Import** tab and click on the **Upload your document here** button to continue selecting a Word doc.

Page Import

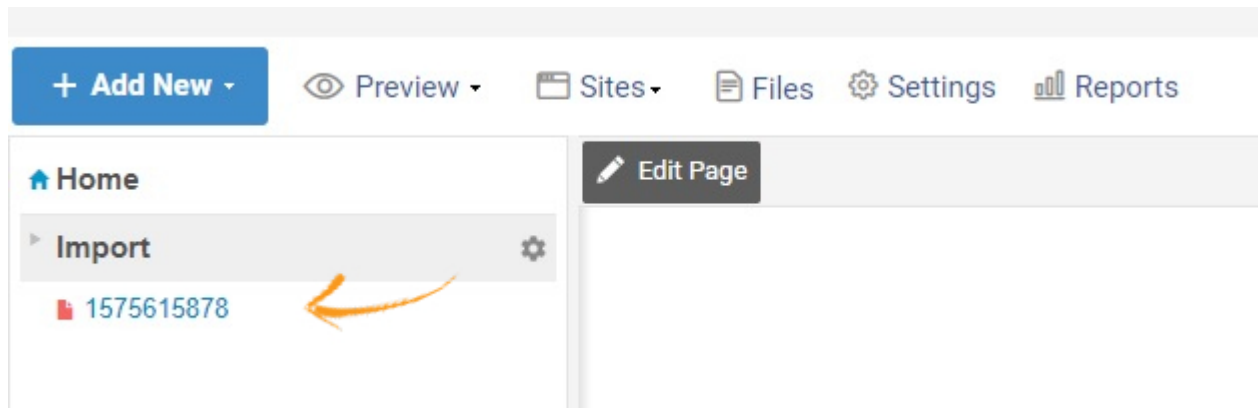


**Step 3:** The following confirmation message will appear after a PDF file is successfully imported. Click **OK** to acknowledge the message.



**Step 4:** The imported file will appear like this on your Knowledge Base dashboard, as shown in the screenshot below. Similarly, you can import more PDF documents depending on your requirements. You'll receive an email confirmation regarding the import on the same email ID that you've used to log in ProProfs Knowledge Base.

**Note:** If you'd like to convert the single PDF doc into multiple pages in the Help site, you need to create H1 tags in the doc's content. During import, the Knowledge Base converts each H1 tag into an individual page.

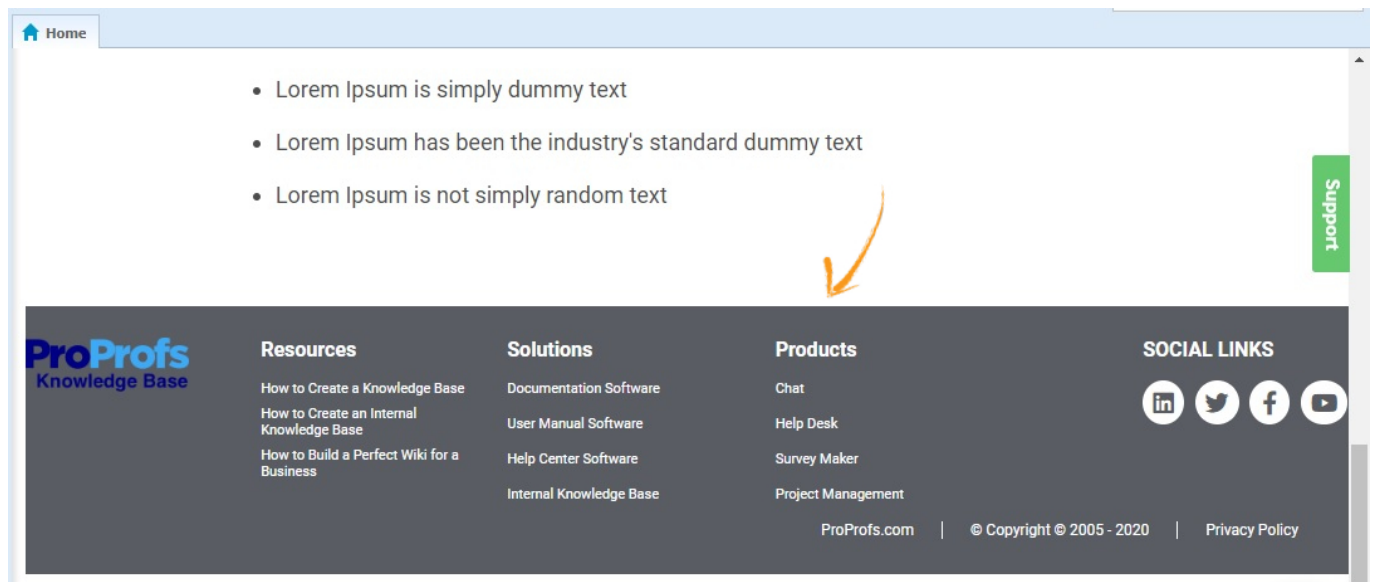


# Mobile & Tablet

# How to Add a Page Footer

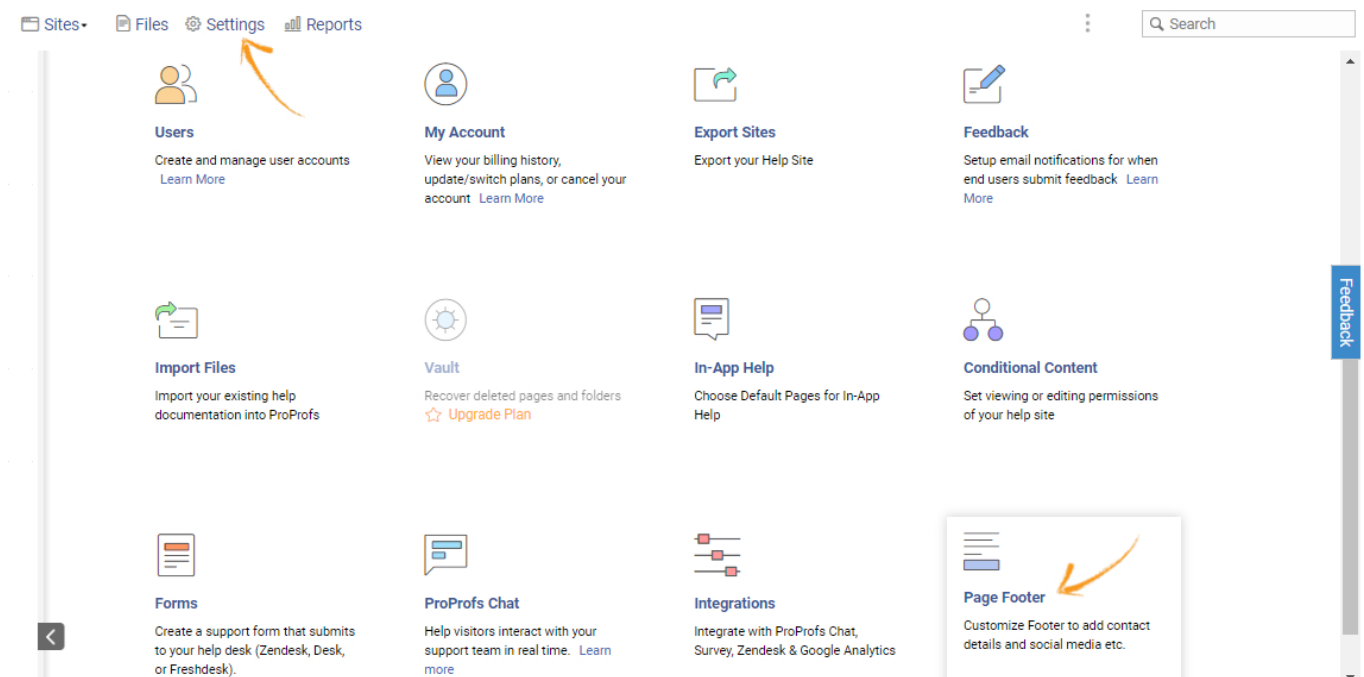
A **Page Footer** can be described as the bottom section on a web page. This section contains a variety of information regarding your business, such as relevant links, product listing, copyright information, social media links, etc.

For example, a footer on a web page looks like this:



Here's how you can add a Page Footer:

**Step 1:** On your ProProfs Knowledge Base dashboard, click **Settings**, and then **Page Footer**.



**Step 2:** To customize your Knowledge Base footer, copy the HTML code and the Style code under **HTML Code** and **CSS Code**, respectively. Once you've added the codes, you can preview the Footer.

#### HTML Code

```
1 <div class="proprofs-knowledge-base">
2 <div class="proprofs-knowledge-base">
3 <div class="proprofs-knowledge-base">
4 <div class="proprofs-knowledge-base">
5 <div class="proprofs-knowledge-base">
6 <div class="proprofs-knowledge-base">
7 <div class="proprofs-knowledge-base">
8 <div class="proprofs-knowledge-base">
9 <div class="proprofs-knowledge-base">
10 <div class="proprofs-knowledge-base">
11 <div class="proprofs-knowledge-base">
12 <div class="proprofs-knowledge-base">
13 <div class="proprofs-knowledge-base">
14 <div class="proprofs-knowledge-base">
15 <div class="proprofs-knowledge-base">
16 <div class="proprofs-knowledge-base">
17 <div class="proprofs-knowledge-base">
18 <div class="proprofs-knowledge-base">
19 <div class="proprofs-knowledge-base">
20 <div class="proprofs-knowledge-base">
21 <div class="proprofs-knowledge-base">
22 <div class="proprofs-knowledge-base">
23 <div class="proprofs-knowledge-base">
24 <div class="proprofs-knowledge-base">
25 <div class="proprofs-knowledge-base">
26 <div class="proprofs-knowledge-base">
27 <div class="proprofs-knowledge-base">
```

#### CSS Code

```
81 .proprofs-knowledge-base {
82 }
83
84 .proprofs-knowledge-base .proprofs-knowledge-base {
85 }
86
87 .proprofs-knowledge-base .proprofs-knowledge-base {
88 }
89
90 .proprofs-knowledge-base .proprofs-knowledge-base {
91 }
92
93
94 .proprofs-knowledge-base .proprofs-knowledge-base {
95 }
96
97
98
99
100
101
102
103
104
105
106
107
108
109
110
111
112
113
114
115
116
117
118
```

Here's an example of how the Footer appears at the bottom of a webpage. Click **Save & Done** to save the changes.

```
46 <div class="proprofs-knowledge-base">
47 <div class="proprofs-knowledge-base">
48 <div class="proprofs-knowledge-base">
49 <div class="proprofs-knowledge-base">
50 <div class="proprofs-knowledge-base">
51 <div class="proprofs-knowledge-base">
52 <div class="proprofs-knowledge-base">
53 <div class="proprofs-knowledge-base">
54 <div class="proprofs-knowledge-base">
55 <div class="proprofs-knowledge-base">
56 <div class="proprofs-knowledge-base">
57 <div class="proprofs-knowledge-base">
58 <div class="proprofs-knowledge-base">
59 <div class="proprofs-knowledge-base">
60 <div class="proprofs-knowledge-base">
61 <div class="proprofs-knowledge-base">
62 <div class="proprofs-knowledge-base">
63 <div class="proprofs-knowledge-base">
64 <div class="proprofs-knowledge-base">
65 <div class="proprofs-knowledge-base">
66 <div class="proprofs-knowledge-base">
67 <div class="proprofs-knowledge-base">
```

```
94 .proprofs-knowledge-base {
95 }
96
97
98
99
100
101
102
103
104
105
106
107
108
109
110
111
112
113
114
115
116
117
118
119
120
121
```

**Resources**

- How to Create a Knowledge Base
- How to Create an Internal Knowledge Base
- How to Build a Perfect Wiki for a Business

**Solutions**

- Documentation Software
- User Manual Software
- Help Center Software
- Internal Knowledge Base

**Products**

- Chat
- Help Desk
- Survey Maker
- Project Management

**SOCIAL LINKS**

○○○○

ProProfs.com | © Copyright © 2005 - 2020 | Privacy Policy

**Step 3:** If you want, you can even enable and disable the Footer. To do that, click the **settings** icon on the page editor.

+ Add New

Preview

Sites

Files

How to Add Your Company Logo

Tour Videos

Create

## How to Add a Page Footer

URL: <https://knowledgebase.proprofs.com/page-footer...>





**Step 4:** Enable or disable the **Footer** option as per your preference.

Basic Advanced

---

Page Type

 ☒ Text  ☐ Video

Author

▼

Table of Contents

☒ Show page in table of contents

PDF

☐ Default page to be included in the PDF

Search results

☒ Show page in search result

Enter Search keywords. Separate each word or phrase by a comma.

Search engines

☐ Allow page to be crawled by search engines (Google, Yahoo, Bing)

Enter meta description. Limit to 320 characters.

Feedback

Footer

Save

Cancel

**Sample Code | HTML**

```
<div class="row container-fluid proprofs-home">
  <div class="proprofs-footer">
    <div class="footer-cont">
      <div class="footer-section logo">
        <div class="fs">
          <a href="https://www.proprofs.com/">
            
          </a>
        </div>
      </div>
      <div class="footer-section contact">
        <div class="fs first">
          <ul>
            <li class="footer-head">Resources</li>
            <li class="footer-text" style="margin-bottom: 7px !important;"><a
```

```
href="https://www.proprofs.com/c/knowledge-management/how-to-create-a-knowledge-base/">How
to Create a Knowledge Base</a></li>
    <li class="footer-text" style="margin-bottom: 7px !important;"><a
href="https://www.proprofs.com/c/knowledge-management/create-internal-knowledge-base/">How
to Create an Internal Knowledge Base</a></li>
    <li class="footer-text" style="margin-bottom: 7px !important;"><a
href="https://www.proprofs.com/c/knowledge-management/build-perfect-wiki-for-business/">How
to Build a Perfect Wiki for a Business</a></li>
  </ul>
</div>
<div class="fs second">
  <ul>
    <li class="footer-head">Solutions</li>
    <li class="footer-text"><a
href="https://www.proprofs.com/knowledgebase/online-documentation/">Documentation
Software</a></li>
    <li class="footer-text"><a
href="https://www.proprofs.com/knowledgebase/user-manual-software/">User Manual
Software</a></li>
    <li class="footer-text"><a
href="https://www.proprofs.com/knowledgebase/self-service-help-center/">Help Center
Software</a></li>
    <li class="footer-text"><a
href="https://www.proprofs.com/knowledgebase/internal-knowledge-base/">Internal Knowledge
Base</a></li>
  </ul>
</div>
</div>
<div class="footer-section address">
  <div class="fs third">
    <ul>
      <li class="footer-head">Products</li>
      <li class="footer-text"><a
href="https://www.proprofs.com/chat/">Chat</a></li>
      <li class="footer-text"><a
href="https://www.proprofs.com/helpdesk/">Help Desk</a></li>
      <li class="footer-text"><a
href="https://www.proprofs.com/survey/">Survey Maker</a></li>
      <li class="footer-text"><a
href="https://www.proprofs.com/project/">Project Management</a></li>
    </ul>
  </div>
</div>
<div class="footer-section social-links">
  <div class="fs fourth">
    <ul>
      <li class="footer-head">SOCIAL LINKS</li>
      <li class="footer-text">
        <a href="https://www.linkedin.com/company/proprofs"
target="_blank"><i class="fab fa-linkedin"></i></a>
        <a href="https://twitter.com/proprofs" target="_blank"><i
class="fab fa-twitter"></i></a>
        <a href="https://www.facebook.com/proprofs" target="_blank"><i
class="fab fa-facebook-f"></i></a>
        <a href="https://www.youtube.com/user/proprofs1"
target="_blank"><i class="fab fa-youtube"></i></a>
      </li>
    </ul>
  </div>
</div>
```



```
        </div>
      </div>
    </div>
  </div>
  <div class="dwn-footer">
    <div class="dwn first">
      <span><a href="https://www.proprofs.com/policies/privacy/" style="color:
#fff!important">Privacy Policy</a></span>
    </div>
    <div class="dwn second">
      &copy; Copyright © 2005 - 2020
    </div>
    <div class="dwn third">
      <span><a href="https://www.proprofs.com/" style="color:
#fff!important">ProProfs.com</a></span>
    </div>
  </div>
</div>
```

## Sample Code | CSS

```
.proprofs-home .proprofs-footer {
  position: relative;
  padding-top: 25px;
  min-height: 1px;
  float: left;
  width: 100%;
  background: #595c63;
  margin-top: 25px;
}
.proprofs-footer .footer-head {
  font-weight: 600 !important;
  margin-bottom: 15px;
  color: #fff;
}
.proprofs-footer .footer-head a {
  color: #fff;
  text-decoration: none;
}
.proprofs-footer .footer-text a {
  color: #fff;
  text-decoration: none;
}
.proprofs-footer .footer-text {
  font-size: 11px;
  color: #fff;
  margin-bottom: 15px;
}
.proprofs-footer ul {
  list-style: none !important;
}
.social-links li i {
  font-size: 19px;
  color: #595c63;
```

```
background-color: #fff;
padding: 8px;
border-radius: 50%;
}
.social-links .fa-facebook-f {
padding: 8px 10px !important;
}
.social-links li a {
margin-right: 6px;
}
.proprofs-home .fs.first ul li i {
padding-right: 17px;
font-size: 14px;
}
.proprofs-home .fs.second ul li i {
padding-right: 17px;
font-size: 14px;
}
.proprofs-footer .footer-cont {
width: 1170px;
margin: 0 auto;
}
.proprofs-footer .footer-section {
float: left;
}
.proprofs-footer .footer-section.logo {
width: 16%;
}
.proprofs-footer .footer-section.contact {
width: 35%;
}
.proprofs-footer .footer-section.address {
width: 25%;
}
.proprofs-footer .footer-section.social-links {
width: 20%;
}
.proprofs-footer .fs.first {
width: 43%;
float: left;
margin-right: 20px;
}
.proprofs-footer .fs.second {
width: 50%;
float: left;
}
.dwn-footer {
width: 100%;
float: left;
background: #595c63;
```

```
    height: 42px;
  }
  .dwn-footer .dwn {
    float: right;
    font-size: 12px;
    padding-right: 22px;
    padding-left: 22px;
  }
  .dwn-footer .dwn.second {
    border-left: 1px solid #fff;
    color: #fff;
    border-right: 1px solid #fff;
  }
  .dwn-footer .dwn.first {
    padding-right: 40px !important;
  }
}
```

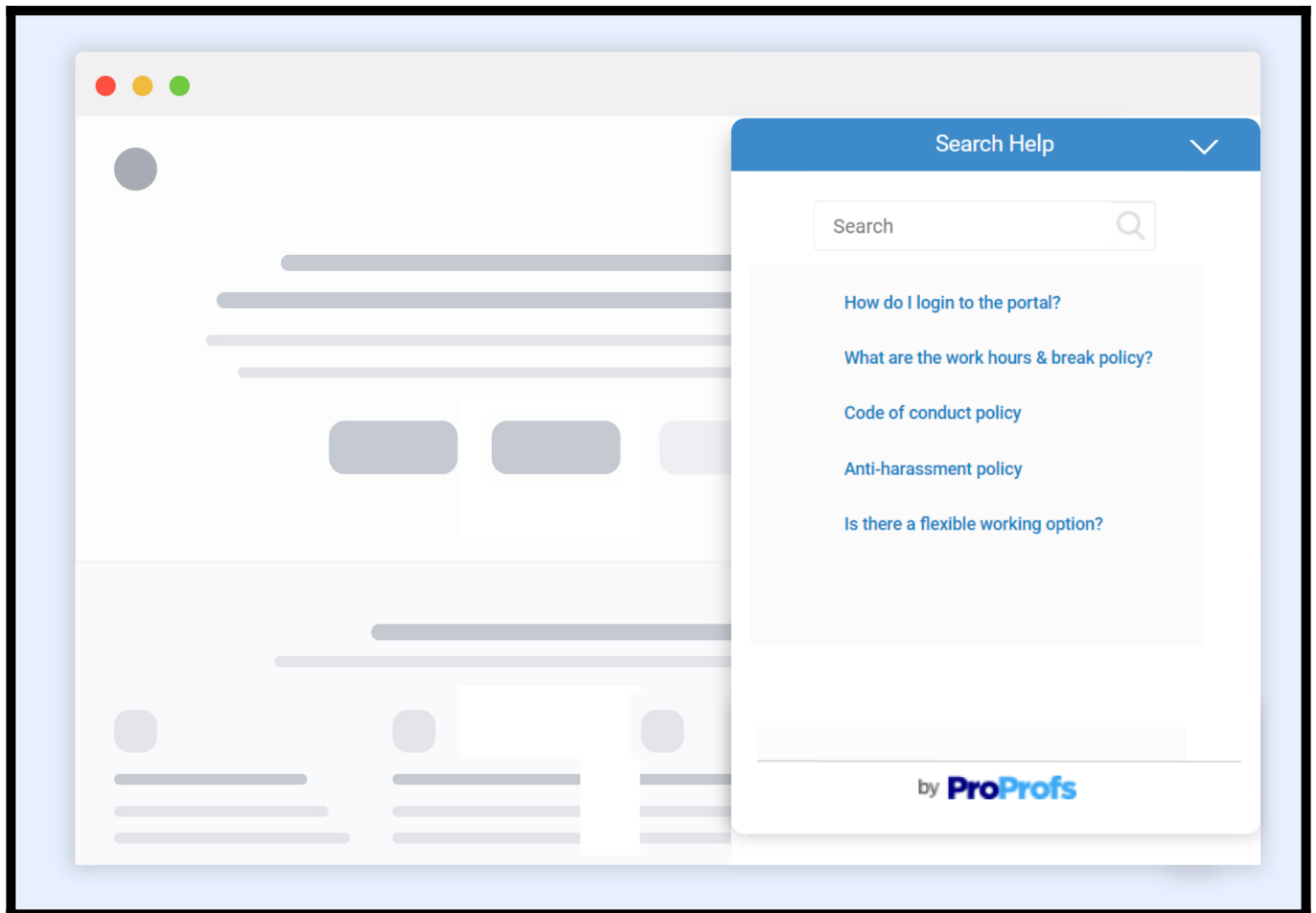
# How to Configure In-App Help Widget for Your Website

**Help Widget** is a web application you can embed on your web pages. It helps you group multiple help articles into a single widget that your website visitors and customers can access instantly.

**Benefits of embedding a Help Widget on your website:**

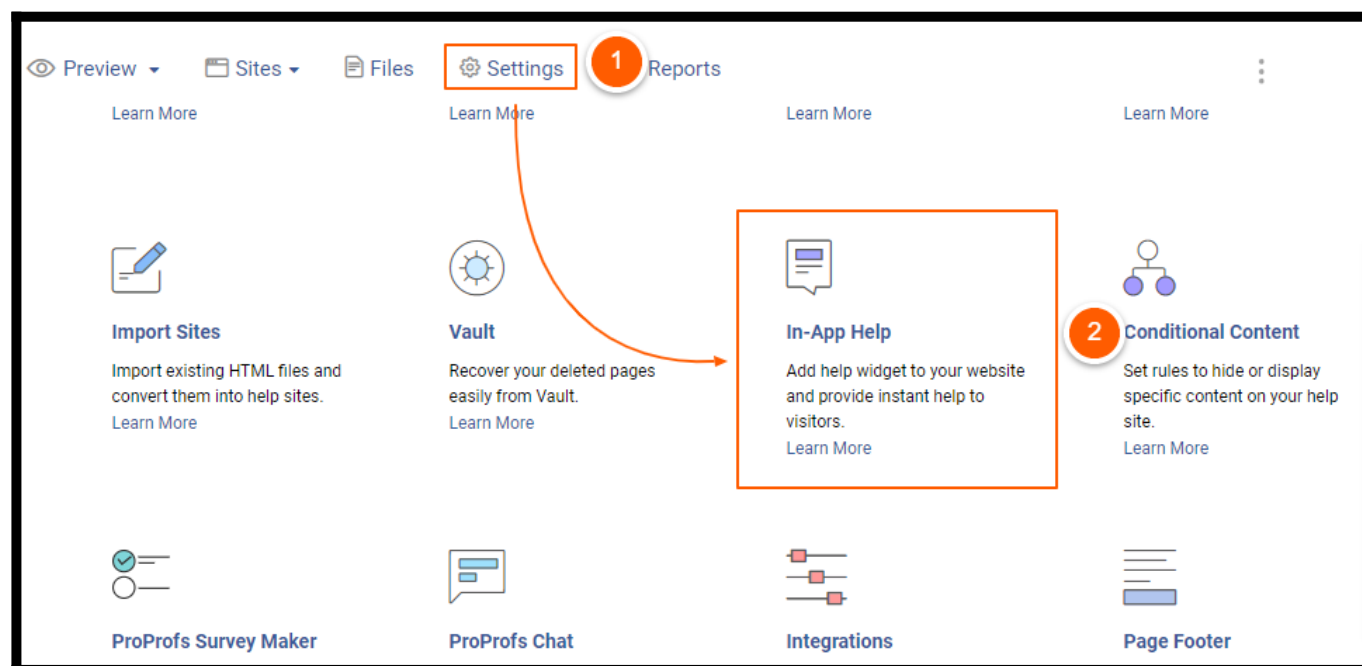
- Improve your customer support
- Promote self-help
- Reduce the number of customer tickets

This is how the In-App Help widget appears on your webpage.



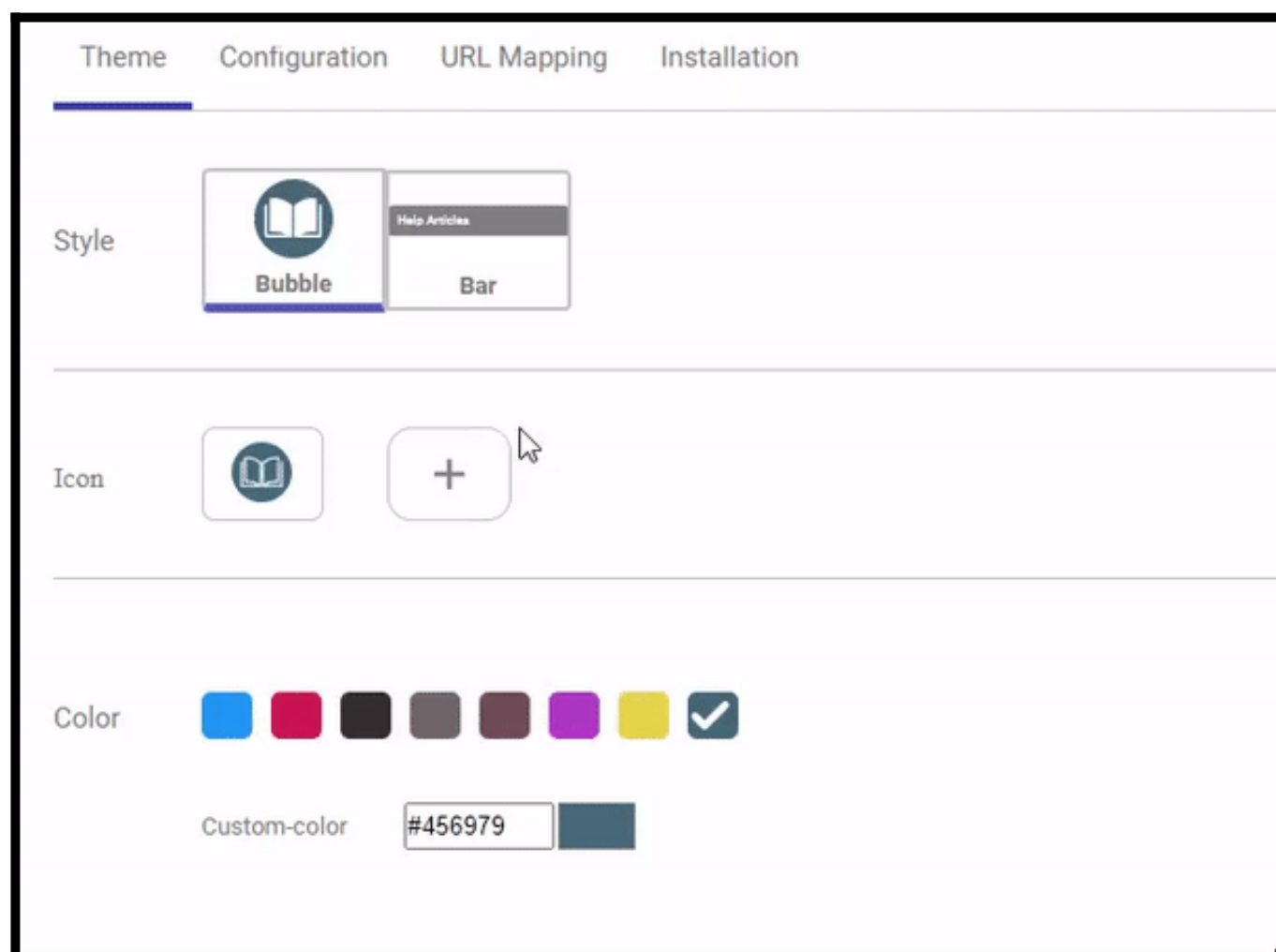
## How to configure the In-App Help widget

**Step 1.** In your ProProfs Knowledge Base editor, open **Settings>> In-App Help**.



In-App Help editor will open.

**Step 2.** In the **Theme** tab, customize your widget and click **Save**.



**Step 3:** In the **Configuration** tab, enter the widget name, select the pages and click **Save**.

The screenshot shows the 'In-App Help' configuration interface. At the top, there are tabs: Theme, Configuration (selected), URL Mapping, and Installation. Below the tabs, the 'Widget Name' field contains 'Help Center'. The 'Enable Search' toggle is turned on. A section titled 'List of folders & pages' displays a list of items with checkboxes for selection. The visible items are: Home! (checked), Getting Started! (checked), Product Tour Videos (checked), How to Configure Setting A (checked), and How to Configure Setting B (checked).

**Step 4:** In the **URL Mapping** tab,

- Enable the “Do you want to configure in-app help on specific URL?” option using the toggle button.
- Enter the target URL.
- Select pages and click **Save**.

The screenshot shows the 'In-App Help' configuration interface with the 'URL Mapping' tab selected. The 'Add URL Mapping' section has a 'Name' field containing 'Help Center'. The 'URL Targetting' section has a 'Regex' toggle turned off. The 'If URL' section has a dropdown set to 'is' and a text field containing 'http://mist.helpdocsonline.com/home'. The 'Articles' section shows 'Selected: 8' and a list of items with checkboxes for selection. The visible items are: How to Configure Setting / (checked), How to Configure Setting ! (checked), Files (checked), Reports (checked), How to Create a Backup (checked), Where to Download Earlie (checked), How to Install (checked), Product Tour Videos (checked), Unique Features (checked), Product Key Features (checked), How to Configure Setting A (checked), and How to Configure Setting B (checked).

**NOTE!** You can enable **Regex** using the Toggle button for targeting specific patterns.

## Add URL Mapping

Name

### URL Targetting

Regex ☒

1

Enter pattern for regex

example: `https://sample.com/{num}/company`

{any} - For alphanumeric value [0-9, a-z]

{num} - For numeric value [0-9]

{alpha} - For alphabets value [a-z]

Enter URL to check regex

`http://staging.company.com/section/cart?promo=749387493`

2

The URL you entered matches the pattern

### Articles

Selected: 8

#### List of folders & pages

- Home
- Getting Started
  - How to Install
  - Product Tour Videos
  - Unique Features
  - Product Key Features
- Settings
  - How to Configure Setting A

- How to Install
- Product Tour Videos
- How to Configure Setting A
- How to Configure Setting B
- Product Key Features
- Unique Features
- Where to Download Earlier Version?

Select All Select None

Save

3

You can see the added URL in the list.

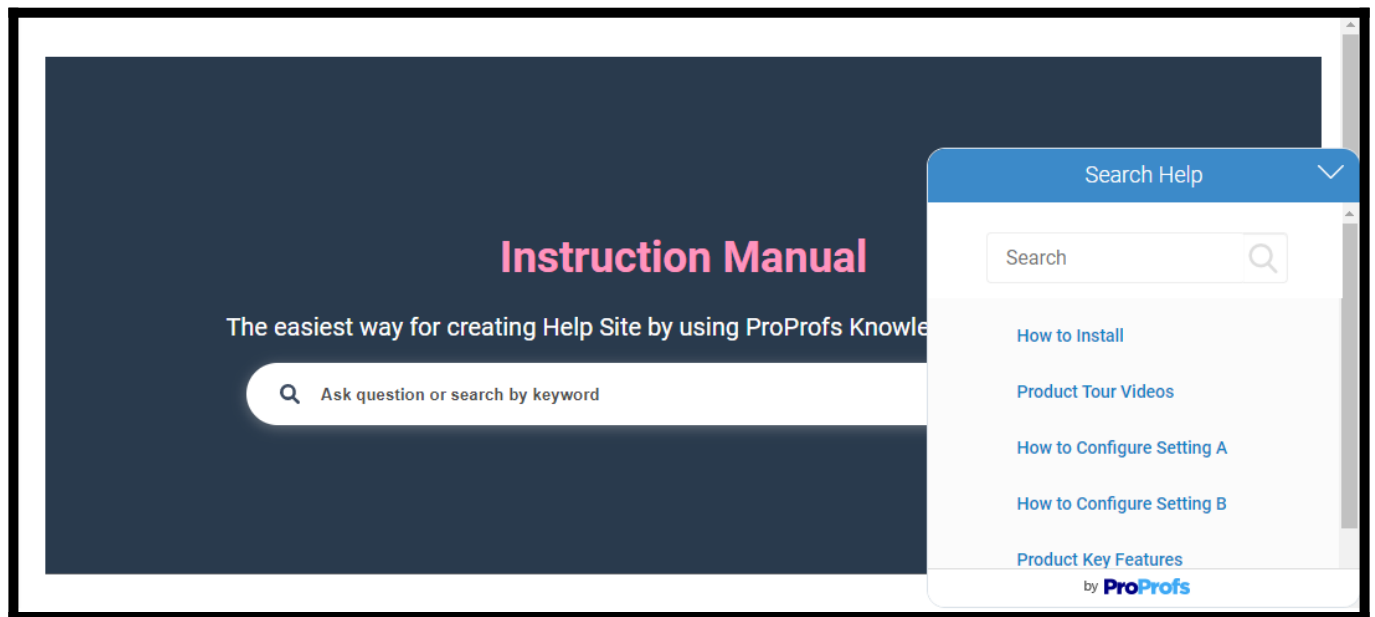
The screenshot shows the 'In-App Help' settings page with the 'URL Mapping' tab selected. At the top, there's a header 'In-App Help' with a 'back to settings' link and a description: 'Help visitors interact with your support team in real time. Learn more. [Learn more](#)'. Below the header are four tabs: 'Theme', 'Configuration', 'URL Mapping' (which is underlined), and 'Installation'. A toggle switch for 'Do you want to configure in-app help on specific URL?' is turned on, with a '+ New URL' link to its right. Below this is a table with three columns: 'Name', 'URL / Keyword', and 'Status'. One entry is visible: 'Help Center' with the URL 'http://mist.helpdocsonline.com/home' and a toggle switch that is turned on. The 'Help Center' text and the URL are highlighted with an orange box.

**Step 5:** Switch to the **Installation** tab and copy the **Embed Code**.

The screenshot shows the 'Installation' tab selected in the settings page. The 'API Key' is displayed in a text box as '574e9badc644127b935bfc221973beaa4233f3322479'. Below the API key, the 'Embed Code' section contains a code block with the following script: `<script src="http://instruction.helpdocsonline.com/helpiq_embed.js?api_key=574e9badc644127b935bfc221973beaa4233f3322479&embed=true"></script>`. This code block is highlighted with an orange box. To the right of the code block is a 'Copy To Clipboard' button.

**Step 6:** Paste the embed code into your webpage using any HTML editor and save the changes. The In-App Help widget will appear on your website like this:





*That is all about configuring the In-App help widget for your website.*

### Related Articles:

- [How to Enable Callouts in the Knowledge Base](#)
- [How to Add Toggle Content](#)
- [How to Access the Revision History of a Page](#)

# ProProfs Knowledge Base Integrations

# Forms

# How to Integrate Salesforce With ProProfs knowledge Base

Salesforce is an all-in-one CRM that has everything a fast-growing business needs to provide fast and awesome customer service. By integrating ProProfs and Salesforce, you'll have the power of ProProfs Knowledgebase and the reliability of Salesforce for your customer support. With a single click, your customers can fill out the support form in your knowledge base and the data will automatically be sent to Salesforce where a case will be created. Setup is also a breeze as ProProfs uses the case fields from your Salesforce account.

The screenshot shows a 'Contact Us' form modal window overlaid on a ProProfs Knowledgebase article. The form has a title bar 'Contact Us' with a close button. It contains the following fields and sections:

- Subject \***: A text input field with the placeholder text 'page'.
- Suggested articles**: A list of four article links: 'Adding Videos to a Page', 'Edit or Delete a Page', 'Home Page', and 'How to Add and Publish a Page'.
- Name \***: A text input field.
- Email \***: A text input field.
- Description \***: A larger text input field.

At the bottom of the form, there is a link that says 'Check us out on Twitter'. The background shows a blurred view of a knowledgebase article with a sidebar menu on the left and a 'Support' button on the right.

- Collect feedback and create cases

You can collect feedback, feature requests and more from customers with an embedded support form in your knowledgebase. This makes it easy for customers to contact you directly from your ProProfs site, while a ticket for the same is also automatically raised in Salesforce.

- **Reduce tickets with search suggestions**

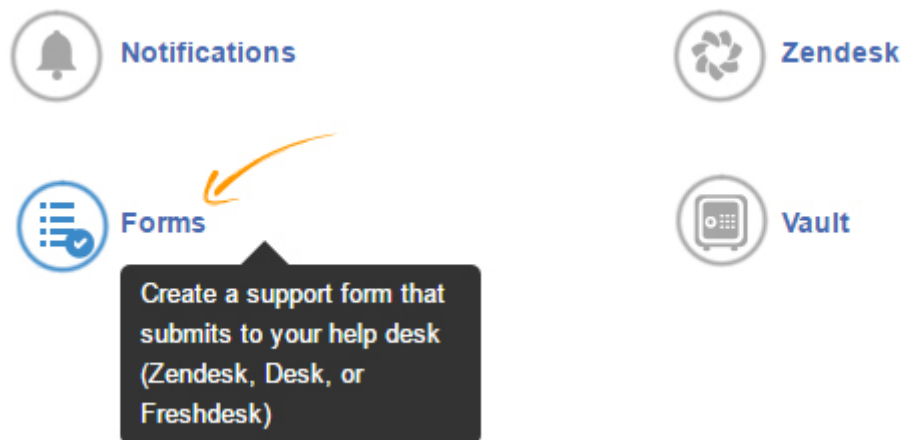
The Support Widget is powered by your ProProfs Knowledgebase. As the user is typing in a subject for the ticket, relevant pages from your ProProfs are suggested instantly. This helps users find what they are looking for so they don't have to submit a ticket.

### How do I set up Salesforce Integration?

- [Activate the integration](#)
- [Create the Support Form](#)
- [Customize the Support Form](#)
  - [Form Settings](#)
  - [Tab Settings](#)
  - [Embed Options](#)

## Activate the integration

**Step 1.** Go to **ProProfs Knowledge Base Settings** and click on **Forms**.



**Step 2.** Select **Salesforce**, enter your Organization ID and click on **Next**.

Select Help Desk Vendor Step 1 of 2



Enter in credentials

ProProfs will use an API to submit the form to the selected vendor. Follow this guide for finding the required credentials

\*Enter your orgid

00D28000000fC6w

Example(<input type=hidden name='orgid' value='00D28000000fC6w'>)

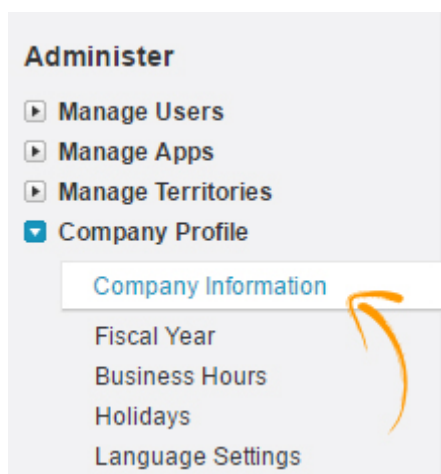
Next

Cancel

How to find Salesforce Organization ID

The Support Widget will submit the data to Salesforce via API. The first step is to fill in your **ORGID**. This can be found by:

- Log into Salesforce. From the menu options select **Company Profile** and then **Company Information**.



- Now, copy your **Salesforce Organization ID**.

API Requests, Last 24 Hours	0 (15,000 max)
Streaming API Events, Last 24 Hours	0 (10,000 max)
Restricted Logins, Current Month	0 (0 max)
Salesforce.com Organization ID	00D28000000fC6w
Organization Edition	Developer Edition

## Create the Support Form

After you enter in your credentials and click next, ProProfs will connect to Salesforce and read all the case fields. Custom case fields are typically used to gather more information about the support issue, product, or service. For example, you may want your customers to also select the model name and number of your product. Learn how to add case fields in [Desk](#).

### Select Form Field Step 2 of 2 [< back](#)


Show	Required	Label	Original Label	Type	Layout
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Subject"/>	Subject	Text	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Description"/>	Description	Multi-Line	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Company"/>	Company	Text	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Phone"/>	Phone	Text	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Email"/>	Email	Email	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Name"/>	Name	Text	1 column ▾


After ProProfs reads the case fields, you will set which fields you want to display, if the field is required, and the order of the fields.

**Note:** ProProfs will read all fields. It is up to you to select which fields you want to collect.

- **Show Field** - Place a checkmark for each field you want to display on the form. Uncheck, and the field will be hidden.
- **Make Field Required** - Place a checkmark for each field you want to be required to fill out.
- **Label** - The original label is shown as provided by Salesforce. You can leave as is or rename (this will not affect your CRM).
- **Type** - The field type as provided by Salesforce (text, email, multi-line, drop down, etc.,)
- **Layout** - This refers to the form layout. 1 column layout means that the form field will span the entire form width. 2 column layout means the form will allow 2 fields side-by-side to each other.

Contact Us ✕

**Subject \*** 

**Description \*** 

**Company \*** **Phone \***

**Email \*** **Name \***

- **Field Order** - You can change the order of the fields by dragging and dropping to the desired order. For example, let's say you want 'Type' to appear before 'Name'. You can simply drag it above.

Once you have finished with the fields, click **Next**.

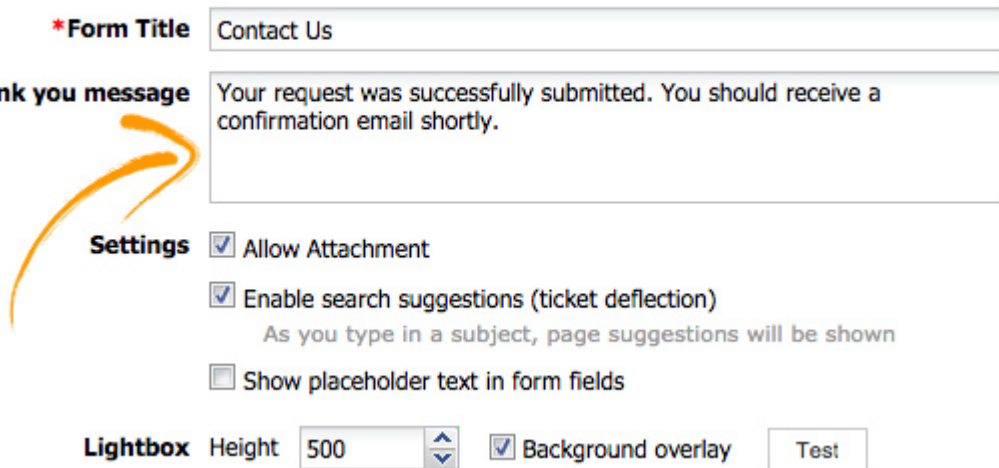
## Customize the Support Form

### Form Settings

After you have successfully setup the fields you can now customize the Support Form.



## Form Settings



**\* Form Title**

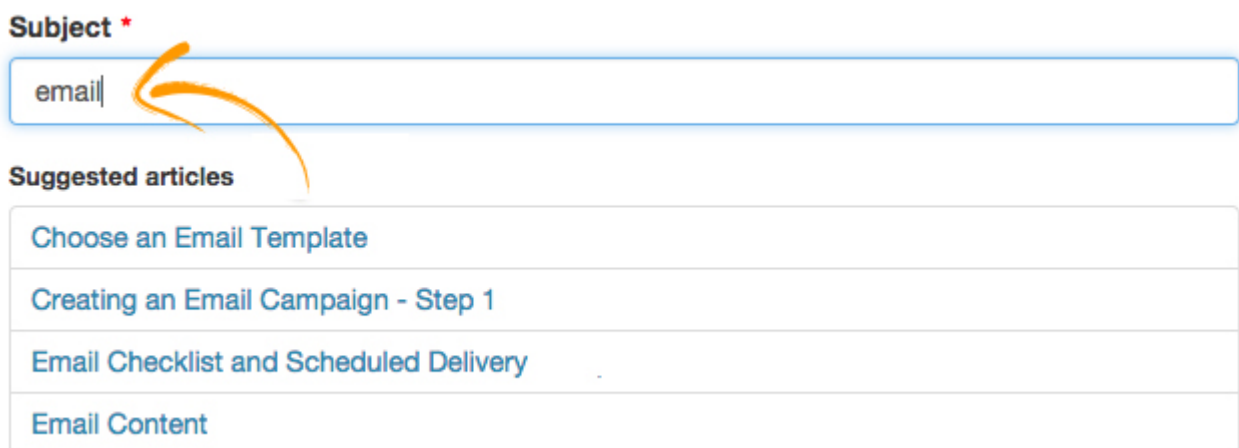
**\* Thank you message**

**Settings**

- ☒ Allow Attachment
- ☒ Enable search suggestions (ticket deflection)  
As you type in a subject, page suggestions will be shown
- ☐ Show placeholder text in form fields

**Lightbox** Height  ☒ Background overlay

- **Form Title** - Enter a form title.
- **Thank you message** - The thank you message will be shown after the form has successfully been submitted.
- **Allow attachment** - Select this option if you want to allow users to attach files to the case.
- **Enable search suggestions (case deflection)** - As the user types in a subject for the case, pages from your ProProfs site are instantly suggested. The goal is to help the user find what they are looking for so they don't have to submit a case. This is often referred to as *case deflection*, as it helps customers find answers without ever having to submit a case.



**Subject \***

**Suggested articles**

- [Choose an Email Template](#)
- [Creating an Email Campaign - Step 1](#)
- [Email Checklist and Scheduled Delivery](#)
- [Email Content](#)

**Note:** At this time only topics from your ProProfs site are suggested.

- **Show placeholder text in form fields** - Select this option if you want placeholder text to be in the form fields.



- **Lightbox Height** - Enter in the height of the lightbox window. The default is 500 pixels.
- **Background Overlay** - Select if you want the lightbox to have a transparent (80%) background overlay color.

You can also test the form at any time by click the **Test** button.

## Tab Settings

The tab is what your users can click on to display the support form (the tab can also be hidden). It is a small tab that can appear on the top, bottom, left, or right of the web browsers window.



The tab's text and color can be customized and branded.

**Tab** ☒ Enable tab  
The tab will always display in a fixed position in the browsers window.

**Type** ☒ Text ☐ Your image

**Position** Right  Offset (%) 40

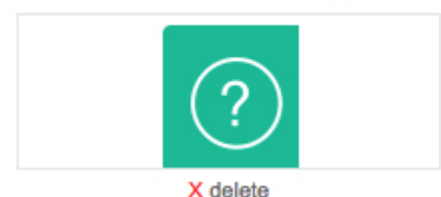
\* **Label** Support  Background color 65c86f  Text color FFFFFFFF

**CSS** ☒ Default ☐ Custom CSS

- **Enable Tab** - Unselect if you do not want to use the tab. You can still open the support form via hyperlink as describe [below](#).
- **Type** - You can use the default 'text' tab or upload your own image.

**Type** ☐ Text ☒ Your image  C:\fakepath\tab-right.jpg

**Position** Right  Offset (%) 40



- **Position** - Choose the position of the tab (top, bottom, left, or right). Changing will instantly update so you can preview it. You can also change the offset to move the tab to the desired location.
- **Label** - Enter in the text of the label. The default is 'Support' but some other good options are: Feedback, Help, Questions, Comments, Email, Ask Us.
- **Background and Text color.** Use the color picker to select the color of the tab. You can also change the color of the text.
- **CSS** - For more advanced customizations, you can enter in your own custom CSS for the tab.

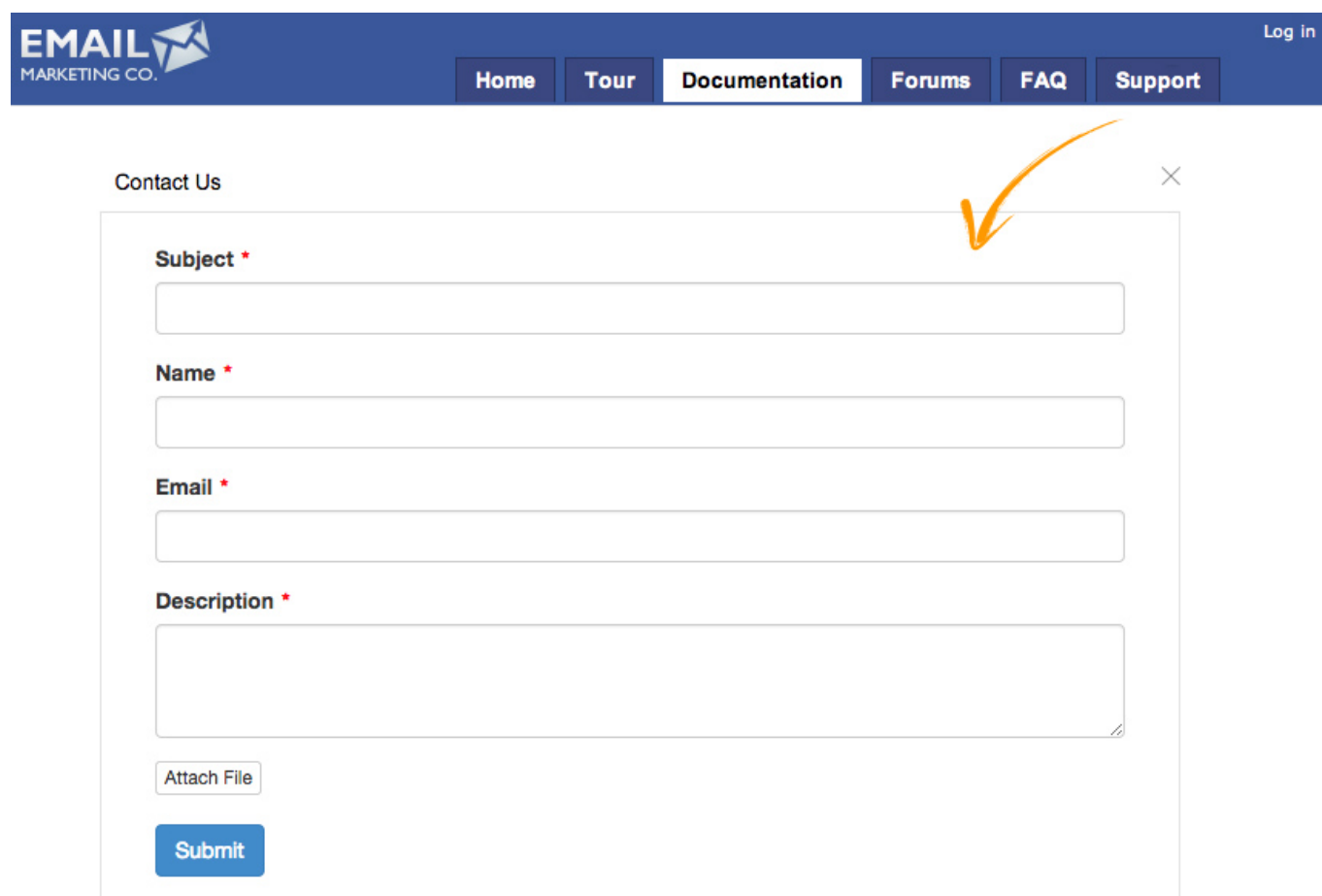
**Note:** Every customization you make will reflect in real-time so you can have a live preview of all your changes as you customize.

## Embed Options

In addition to the tab, we provide a few other options in displaying the Support Form.

<b>Lighbox Hyperlink</b>	<pre>&lt;a href="#" rel="supportlightbox"&gt;Support&lt;/a&gt;</pre> <p>Add hyperlink to any HelpIQ page to open a lightbox</p>
<b>Pop-up Hyperlink</b>	<pre>&lt;a href="javascript:void(window.open('http://stage.youremailco.com/ticket/load_form','blank','scrollbars=yes,toolbar=no,width=700,height=800'));" &gt;Support&lt;/a&gt;</pre> <p>Add hyperlink to any HelpIQ page or external site to open a pop-up</p>
<b>Embed Code</b>	<pre>&lt;iframe allowtransparency="true" frameborder="0" scrolling="no" src="http://stage.youremailco.com/ticket/load_form" style="width:100%;height:935px;border:none;"&gt;&lt;/iframe &gt;</pre> <p>Add the form on any HelpIQ page or external site (does not use Lightbox)</p>

- **Lightbox** - This option allows you to add hyperlink anywhere inside of ProProfs to open the support form in a lightbox. You could add the link in your navigation or anywhere on a page, that when clicked, will open the lightbox. To use, simply copy the provided hyperlink code `<a href="#" rel="supportlightbox">Support</a>` and paste it onto any page or in your header. You can see a link we added to the [custom header](#) called 'Support' below.



EMAIL  
MARKETING CO.

Home Tour Documentation Forums FAQ Support

Log In

Contact Us

Subject \*

Name \*

Email \*

Description \*

Attach File

Submit

- **Popup** - This option works best for external websites and web applications. Just copy the provided code and paste it in your website. Clicking the link will open the support form in a pop-up window.
- **Embed Code** - If you want to embed just the form (no lightbox or pop-up window) then you can use this code. Just copy the provided code and paste it in the source code of any page of your external website.

#### Related Articles:

[Add ProProfs Survey Maker Form in ProProfs Knowledge Base](#)

[Add Salesforce Desk Form in ProProfs Knowledge Base](#)

[Add Freshdesk Form in ProProfs Knowledge Base](#)

# How to Integrate Freshdesk With ProProfs Knowledgebase

Any helpdesk solution is incomplete without a knowledge base. If you're looking to do more with Freshdesk (a popular helpdesk solution) than just collect customer tickets; then, ProProfs Knowledgebase fits the bill perfectly. Using the integration, you can easily share information and collect feedback from customers, reduce support tickets, initiate Freshdesk tickets from ProProfs and do much more.

**Contact Us**

**Subject \***

page

**Suggested articles**

- [Adding Videos to a Page](#)
- [Edit or Delete a Page](#)
- [Home Page](#)
- [How to Add and Publish a Page](#)

**Name \***

**Email \***

**Description \***

freshdesk

- Embed support forms in your knowledgebase or website

Capture customers' feedback directly in your knowledgebase with the help of a support form. You can also embed a support form on any page of your website to save your customers from having to locate your contact details or support email when they are in your website. [Creating the form](#) is easy and you can [customize](#) it to your liking.

- **Initiate Freshdesk tickets from ProProfs**

Use ProProfs to collect support tickets, feedback, feature requests, and much more. Once customers submit a support request in your ProProfs site, a ticket for the same is automatically raised in Freshdesk.

- **Reduce support tickets**

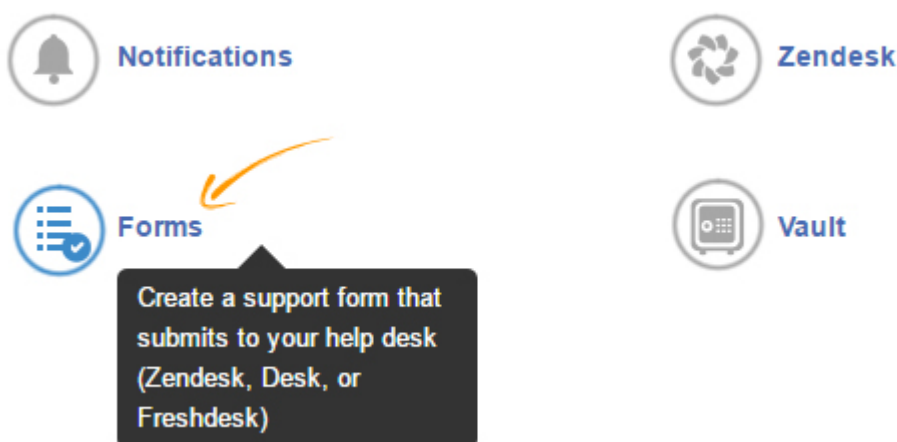
[ProProfs ticket deflection technology](#) helps your customers find instant answers. Just as a customer is typing in a subject for the ticket, relevant pages from your ProProfs are suggested instantly. This helps them find what they are looking for so they don't have to submit a ticket.

### How do I set up Salesforce Integration?

- [Activate the integration](#)
- [Create the Support Form](#)
- [Customize the Support Form](#)
  - [Form Settings](#)
  - [Tab Settings](#)
  - [Embed Options](#)

## Activate the integration

**Step 1.** Go to ProProfs **Knowledge Base Settings** and click on **Forms**.



**Step 2.** Select **Freshdesk**, add your credentials and click on **Next**.

- **Username** - Enter your Freshdesk username such as james@abc.com. This can be any valid Freshdesk username.

- **Subdomain** - Enter your Freshdesk account URL such as amex1.freshdesk.com.
- **API Key** - Enter your API key. You can find the API key in your [Freshdesk Profile Settings](#).

#### Select Help Desk Vendor Step 1 of 2



#### Enter in credentials

ProProfs will use an API to submit the form to the selected vendor. [Follow this guide](#) for finding the required credentials

\*Username

\*Helpdesk URL

URL for your help desk account.

\*API Key

Cancel

Next

## Create the Support Form

After you enter in your credentials and click next, ProProfs will connect to Freshdesk and read all the ticket fields. Custom ticket fields are typically used to gather more information about the support issue, product, or service. For example, you may want your customers to also select the model name and number of your product. Learn how to [add ticket fields in Freshdesk](#).

#### Select Form Field Step 2 of 2 << back

Show	Required	Label	Original Label	Type	Layout
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Subject"/>	Subject	Text	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Name"/>	Name	Text	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Email"/>	Email	Email	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Description"/>	Description	Multi-Line	1 column ▾
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Type"/>	Type	Drop Down	1 column ▾
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Priority"/>	Priority	Drop Down	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Browser"/>	Browser	Drop Down	1 column ▾
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Company"/>	Company	Text	1 column ▾

Cancel

Next

After ProProfs reads the ticket fields, you can set which fields you want to display such as whether the field is required and the order of the fields.

**Note:** ProProfs will read all fields including hidden fields. It is up to you to select which fields you want to use to collect feedback.

- **Show** - Place a checkmark for each field you want to display on the form. Uncheck, and the field will be hidden.
- **Make** - Place a checkmark for each field you want to be required to fill out.
- **Label** - The original label is shown as provided by Freshdesk. You can leave as is or rename (this will not affect your help desk).
- **Type** - The field type as provided by Freshdesk (text, email, multi-line, drop down, etc.,)
- **Layout** - This refers to the form layout. *1 column layout* means that the form field will span the entire width. *2 column layout* means the form will allow 2 fields side-by-side to each other.



**Description \***

**Type**

**Priority**

*2 Columns*

**Browser \***

**Company**

Attach file

Submit

*1 Column*

- **Field Order** - You can change the order of the fields by dragging and dropping to the desired order. For example, let's say you want 'Type' to appear before 'Name'. You can simply drag it above.

Show	Required	Label	Original Label
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subject	Subject
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email	Email
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Type	Type
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Description	Description

Once you have finished with the fields, click **Next**.

## Customize the Support Form

## Form Settings

After you have successfully setup the fields you can now customize the Support Form.

### Form Settings

**\* Form Title**

**\* Thank you message**

**Settings**

- ☒ Allow Attachment
- ☒ Enable search suggestions (ticket deflection)  
As you type in a subject, page suggestions will be shown
- ☐ Show placeholder text in form fields

**Lightbox** Height  ☒ Background overlay

- **Form Title** - Enter a form title.
- **Thank you message** - The thank you message will be shown after the form has successfully been submitted.
- **Enable search suggestions (ticket deflection)** - As the user types in a subject for the ticket, pages from your ProProfs site are instantly suggested. The goal is to help the user find what they are looking for so they don't have to submit a ticket. This is often referred to as *ticket deflection*, as it helps customers find answers without ever having to submit a ticket.

**Subject \***

**Suggested articles**

- [Choose an Email Template](#)
- [Creating an Email Campaign - Step 1](#)
- [Email Checklist and Scheduled Delivery](#)
- [Email Content](#)

At this time only topics from your ProProfs site are suggested.

- **Show placeholder text in form fields** - Select this option is you want placeholder text to be in the form fields.



Subject \*

Subject

- **Lightbox Height** - Enter in the height of the lightbox window. The default is 500 pixels.
- **Background Overlay** - Select if you want the lightbox to have a transparent (80%) background overlay color.

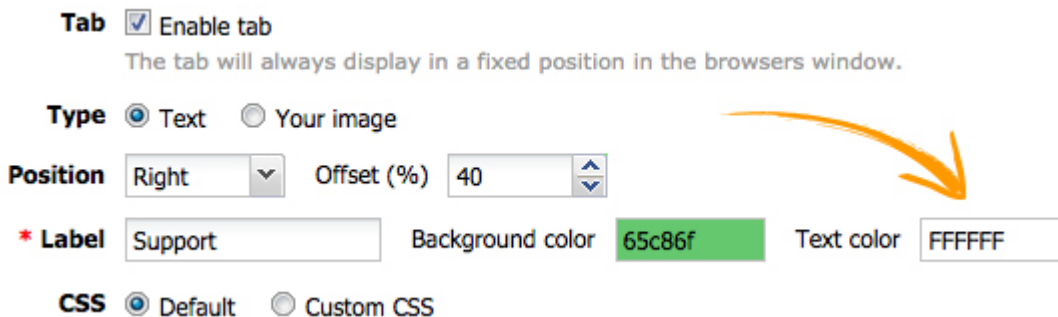
You can also test the form at any time by click the **Test** button.

## Tab Settings

The tab is what your users can click on to display the support form (the tab can also be hidden). It is a small tab that can appear on the top, bottom, left, or right of the web browsers window.



The tab's text and color can be customized and branded.



**Tab** ☒ Enable tab  
The tab will always display in a fixed position in the browsers window.

**Type** ☒ Text ☐ Your image

**Position** Right Offset (%) 40

\* **Label** Support Background color 65c86f Text color FFFFFFF

**CSS** ☒ Default ☐ Custom CSS

- **Enable Tab** - Unselect if you do not want to use the tab. You can still open the support form via hyperlink as describe [below](#).
- **Type** - You can use the default 'text' tab or upload your own image.



**Type** ☐ Text ☒ Your image C:\fakepath\tab-right. Browse...

**Position** Right Offset (%) 40

Preview: A green square tab with a white question mark icon. Below it is a red 'X delete' button.

- **Position** - Choose the position of the tab (top, bottom, left, or right). Changing it will instantly update the position and you can also preview it. You can also change the offset to move the

tab to the desired location.

- **Label** - Enter in the text of the label. The default is 'Support' but some other options are: Feedback, Help, Questions, Comments, Email, Ask Us.
- **Background and Text color.** Use the color picker to select the color of the tab. You can also change the color of the text.
- **CSS** - For more advanced customizations, you can enter in your own custom CSS for the tab.

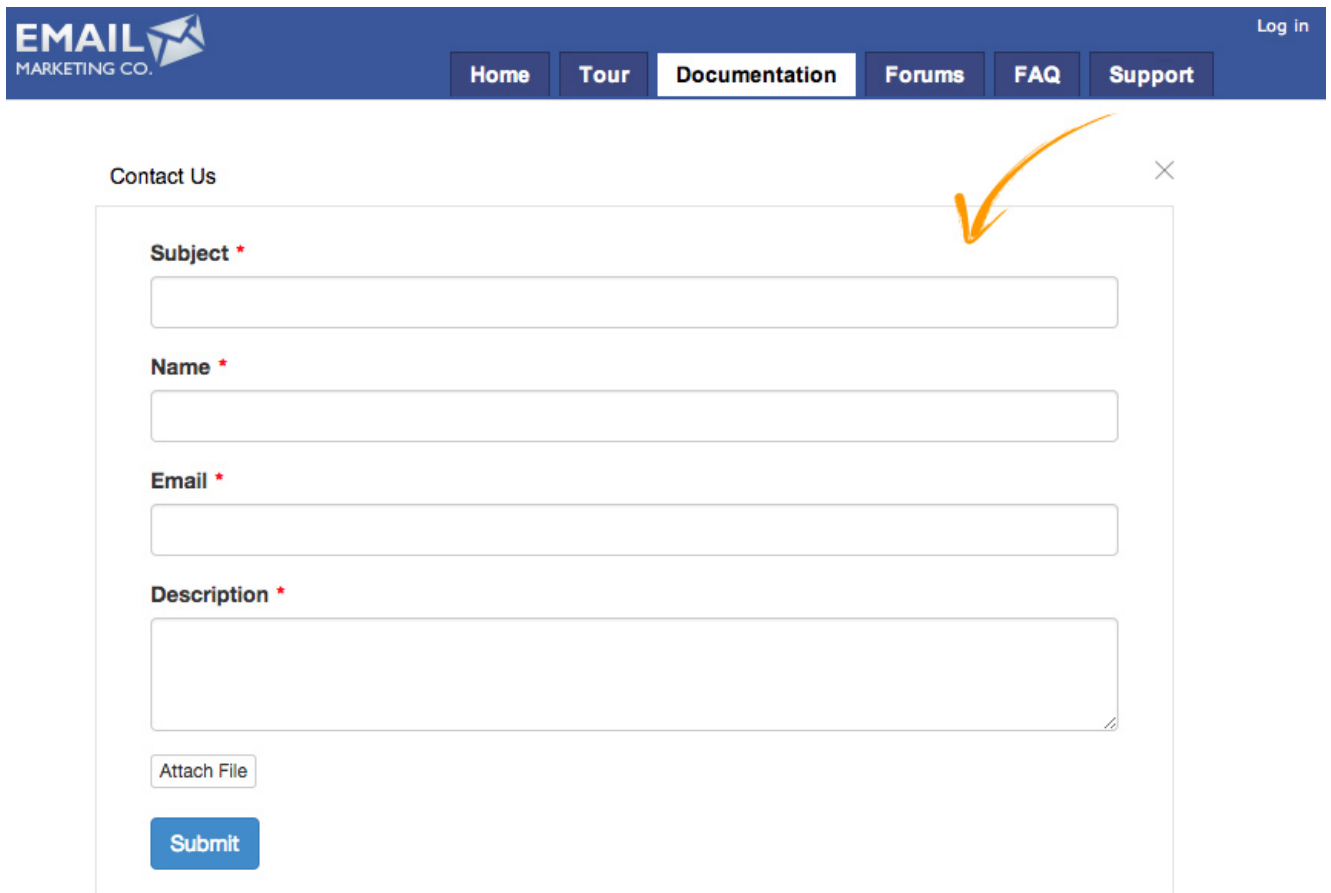
Every customization you make will reflect in real-time so you can have a live preview of all your changes as you customize.

## Embed Options

In addition to the tab, we provide a few other options in displaying the Support Form.

<b>Lightbox Hyperlink</b>	<pre>&lt;a href="#" rel="supportlightbox"&gt;Support&lt;/a&gt;</pre> <p>Add hyperlink to any HelpIQ page to open a lightbox</p>
<b>Pop-up Hyperlink</b>	<pre>&lt;a href="javascript:void(window.open('http://stage.youremailco.com/ticket/load_form','blank','scrollbars=yes,toolbar=no,width=700,height=800'));" &gt;Support&lt;/a&gt;</pre> <p>Add hyperlink to any HelpIQ page or external site to open a pop-up</p>
<b>Embed Code</b>	<pre>&lt;iframe allowtransparency="true" frameborder="0" scrolling="no" src="http://stage.youremailco.com/ticket/load_form" style="width:100%;height:935px;border:none;"&gt;&lt;/iframe &gt;</pre> <p>Add the form on any HelpIQ page or external site (does not use Lightbox)</p>

- **Lightbox** - This option allows you to add a hyperlink anywhere in your ProProfs Knowledgebase to open the support form in a lightbox. You could add the link in your navigation or anywhere on a page, that when clicked, will open the lightbox. To use, simply copy the provided hyperlink code `<a href="#" rel="supportlightbox">Support</a>` and paste it onto any page or in your header. You can see a link we added to the [custom header](#) called 'Support' below.



EMAIL MARKETING CO. [Home](#) [Tour](#) [Documentation](#) [Forums](#) [FAQ](#) [Support](#) [Log in](#)

Contact Us

**Subject \***

**Name \***

**Email \***

**Description \***

[Attach File](#)

[Submit](#)

- **Popup** - This option works best for external websites and web applications. Just copy the provided code and paste it in your website. Clicking the link will open the support form in a pop-up window.
- **Embed Code** - If you want to embed just the form (no lightbox or pop-up window) then you can use this code. Just copy the provided code and paste it in the source code of any page of your external website.

**Related Articles:**

[Add Custom Form in ProProfs Knowledge Base](#)

[Integrate Salesforce with ProProfs Knowledge Base](#)

[Add ProProfs Survey Maker Form in ProProfs Knowledge Base](#)

# How to Add a Custom Form in ProProfs Knowledge Base

**Custom Form**, as the name suggests, is a feedback form that you can create from scratch and easily customize to suit your business needs. Use it for customer feedback or lead generation or something else - the choice is yours.

## Benefits of creating the Custom Form:

- Embed custom forms on webpages and seek feedback in-context
- Generate leads out of your help site visitors
- Let your website visitors know you care about their opinion
- Brands that ask for feedback voluntarily garner more brand loyalty

Here's a quick example of how a Custom Form looks when added:

---

What Is Your Name?

Please provide your email address:

What is the most impressive feature about our knowledge base?

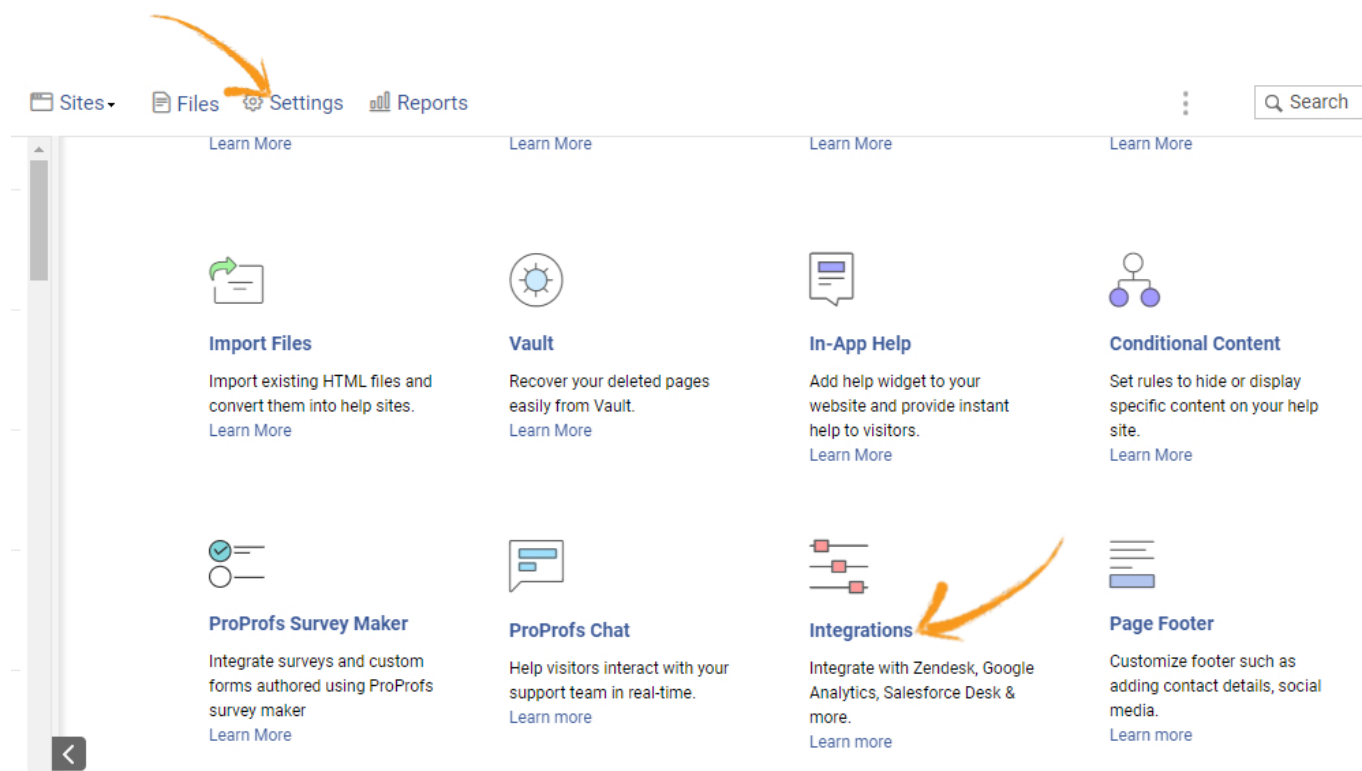
[Submit](#)

In this article, you'll learn:

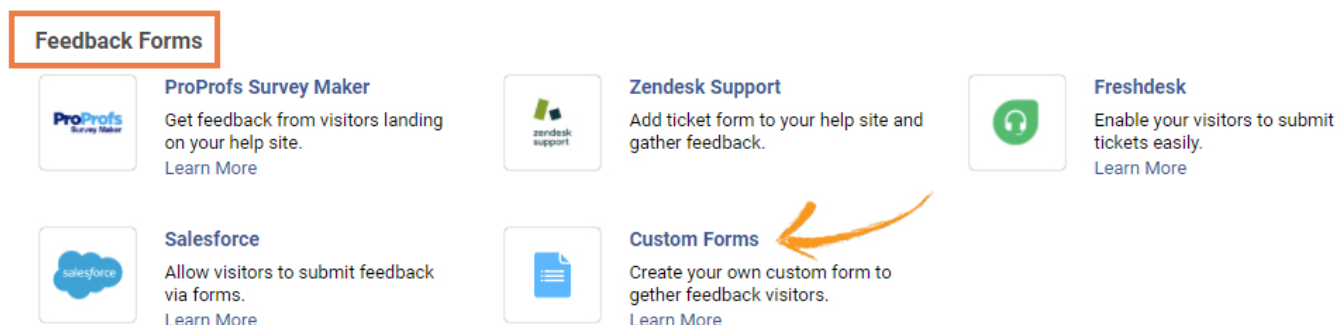
1. [How to create a Custom Form](#)
2. [How to edit and delete a Custom Form](#)

## 1. How to create a Custom Form

**Step 1.** From your ProProfs Knowledge Base dashboard, go to **Settings >> Integrations**.



**Step 2.** Find the section **Feedback Forms** and click **Custom Forms**.



**Step 3.** The screenshot below explains how you can create a Custom Form.

Create a personalized form with custom fields to gather customer feedback.

1. Drag and drop the custom fields that you want to include in the form. While the custom fields **Name**, **Email**, and **Phone** are self-explanatory, other fields are described below:

- **Upload**: Allow a customer to upload a file (.doc, .docx, .pdf, .png, .jpg, .jpeg, .bmp, .gif, and zip). For example, they can upload a screenshot of an error message.
- **Multiple Choice**: Provide multiple options to your customers to choose from. For example, know which of your products the customer is writing for.
- **Large Text**: You can use this field to get detailed feedback.
- **Checkbox**: Allow your customers to select more than one option from the available ones.
- **Dropdown**: This field provides several selectable options in a dropdown; for example, country, state, etc.
- **Single Text**: This is a text field with a limit of 255 characters.

2. By default, the Custom Form template has three fields included for you to start with. You can rearrange the fields in the order of your liking. Also, a Custom Form must have a minimum of three fields.

3. Enable **Customize Button** if you want to customize the **Submit** form button. You can change the **button color** and **text**.

4. When you're done adding the custom fields, click **Next** to move to the form settings.

**Step 4. Settings** allow you to add recipients for your Custom Form. The screenshot below shows you how.



3 — [Next](#)

[Create](#)

[Settings](#)

[Launch](#)

## Email Settings

Add recipients

Email To

1 —

Type the emails(separated by comma) you want the form submission emailed to

Send a Copy to the Respondent?



Email Subject

2 —

Email Message

Your request was successfully submitted. You should receive a confirmation email shortly.

1. The email address where you want to receive form submissions. You can enter multiple email addresses separated by a comma.
2. Enable the option '**Send a Copy to the Respondent?**' if you want the respondents to know that their feedback has been received. Feel free to customize the **email subject** and **message**.
3. Click **Next** to move to the **Launch** tab.

**Step 5.** The **Launch** tab lets you decide how you want the Custom Form to appear in your knowledge base. The screenshot below explains how you can do it.

[Remove](#)

[Preview](#)

[Save](#) — 4

[Create](#)

[Settings](#)

[Launch](#)

Where Do You Want the Ticket Form to Show?

- 1 — ☐ In the Table of Content  
☒ As a Tab in Knowledge Base

Tab Text

Tab Color

2 —

#448ce6

Tab Position

- 3 — ☒ Middle Right ☐ Bottom Right

1. You can have the Custom Form in the **table of contents** and also **as a tab in your knowledge base**.
2. If you want to have it as a tab, you can customize the **tab text** and its **color**.
3. You can further choose its position between '**middle right**' and '**bottom right**'.
4. When you're done, click **Save** to launch the Custom Form.

## 2. How to edit and delete a Custom Form

You can edit a Custom Form anytime you want under the **Create** tab. Also, you can now move freely between the tabs Create, Settings, and Launch, which you can't do while creating a new form. To delete the form, simply click **Remove**.

The screenshot shows the ProProfs Knowledge Base interface. At the top, there's a header with the ProProfs logo, a 'Forms' tab, and a 'Back to settings' link. Below the header, there's a navigation bar with 'Remove', 'Create', 'Settings', and 'Launch' buttons. The 'Create' button is highlighted with an orange box. Below the navigation bar, there's a description: 'Create a personalized form with custom fields to gather customer feedback.' The main content area shows a 'Support Ticket Form' with fields for 'Name', 'Email', 'Phone', 'Message', and 'Upload'. There are also checkboxes for 'Multiple Choice', 'Large Text', 'Checkbox', and 'Dropdown'. A 'Customize Button' toggle is visible, along with a 'Button Color' selector set to '#448ce6' and a 'Button Text' field.

### Related Articles:

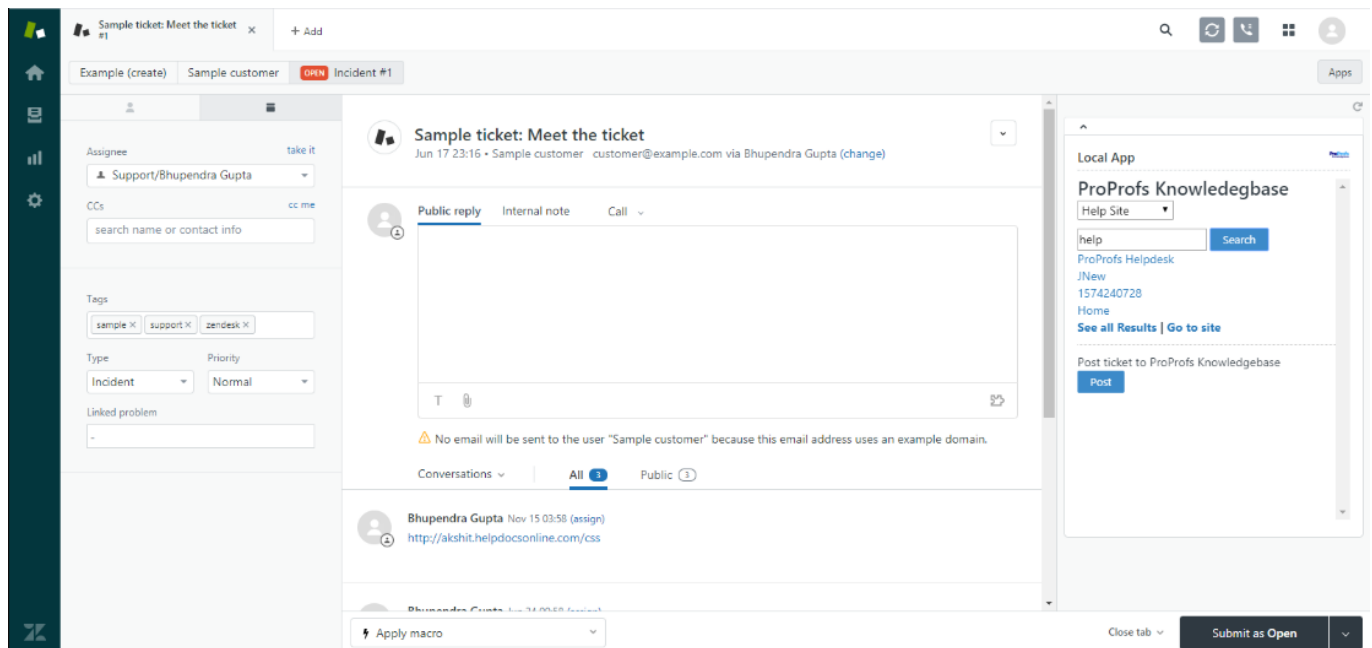
[How to Add ProProfs Survey Maker Form in ProProfs Knowledge Base](#)  
[How to Integrate Salesforce with ProProfs Knowledge Base](#)  
[How to Add Freshdesk Support Widget in ProProfs Knowledge Base](#)

# Zendesk

# Zendesk Integration with ProProfs Knowledge Base

How does this integration help me?

ProProfs Knowledgebase integrates seamlessly with both versions - [Zendesk Classic](#) and [New Zendesk](#). You can use this powerful integration in many ways; such as, search your ProProfs documentation from within Zendesk, instantly convert a Zendesk support ticket into a new help topic in ProProfs, initiate Zendesk tickets from ProProfs with support forms and more.



## Search ProProfs documentation within Zendesk

You can easily find helpful documentation when responding to support tickets in Zendesk. For instance, if a customer submits a support ticket with questions about installing a printer driver, you can quickly search your ProProfs documentation, locate the help topic, then reply with the URL of the help topic in the support ticket response.

## Convert a Zendesk support ticket into a new help topic

You can instantly turn Zendesk support tickets into help topics and knowledgebase articles in ProProfs. This helps your constantly improve the documentation in your knowledge base and ensure that it answers all your customer questions.

## Collect customer feedback & initiate tickets

Collect feedback, feature requests and more from customers in your knowledge base with an embedded support form. Once customers fill this request form in your ProProfs site, a ticket for the same is automatically raised in Zendesk.

## How do I set it up?

The integration is different for Zendesk Classic and New Zendesk. While the Classic version came with an agent interface and web portal, the New Zendesk comes with an app and help center integration. Use the instructions mentioned below, according to the version you're using.

### [Zendesk Classic](#)

- [Agent Interface](#)
- [Web Portal](#)

### [New Zendesk](#)

- [Agent App](#)
- [Help Center](#)

---

## Zendesk Classic

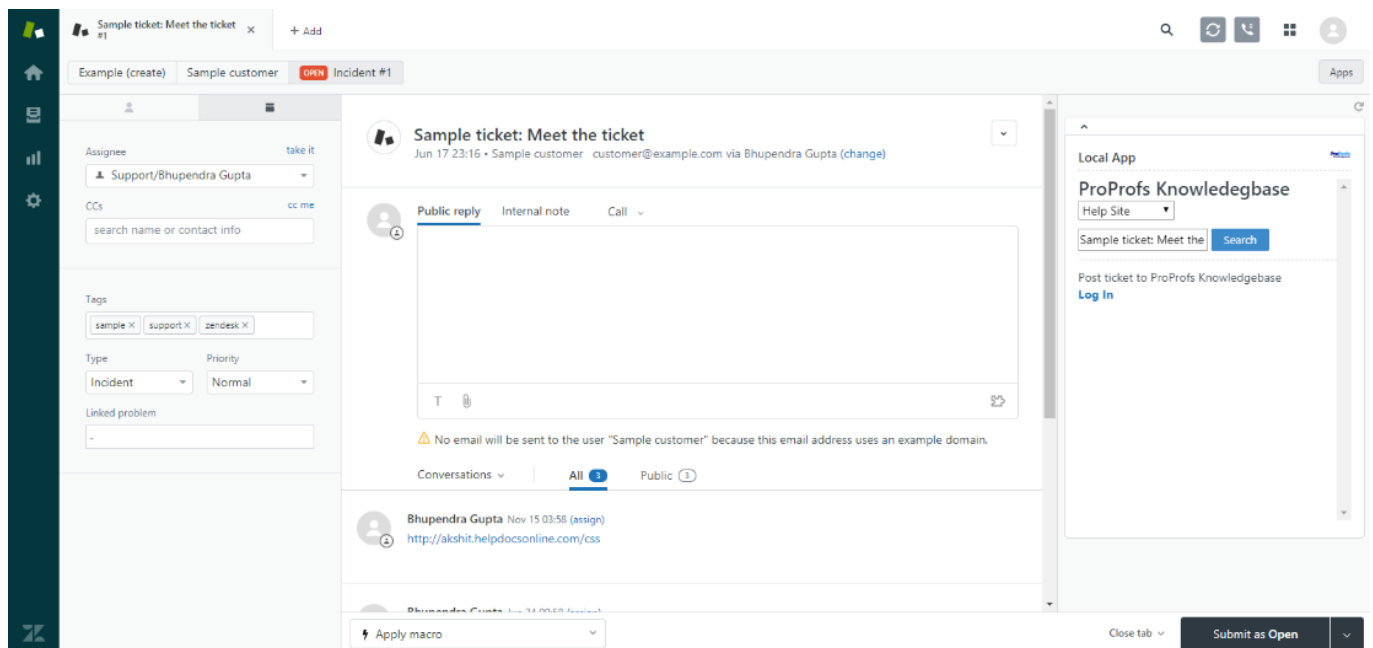
### Agent Interface

Zendesk Classic refers to the version of Zendesk that was the default for all new accounts up until September 2012. The agent interface is what your agents use when responding to support tickets in Zendesk.

From the agent interface ProProfs offers two integrations:

1. The ability to quickly search your ProProfs documentation from Zendesk to help solve support tickets
2. The ability to turn a support ticket into a help topic from Zendesk

Follow this guide for adding the [Search Widget](#) and [Post Ticket Widget](#)



## Web Portal

On Zendesk Classic, the customer-facing knowledge base and forum is referred to as the Web Portal. This is what your end-users and customers see when they go to your Zendesk i.e., [mycompany.zendesk.com](http://mycompany.zendesk.com).

For the Classic Zendesk Web Portal, ProProfs offers three integrations:

1. The ability to add a "Documentation" tab in Zendesk's navigation that points to your ProProfs documentation. This makes it easy for your end users to access your documentation when they are in Zendesk.
2. The ability to add a search button to your Zendesk forum site for your end users to search your ProProfs documentation.
3. The ability to download your Zendesk's header into ProProfs for a seamless match. Your end users will never have a clue they are going between Zendesk and ProProfs.

Follow this guide for adding a [documentation tab](#), [search button](#) and [customized header](#).

## New Zendesk

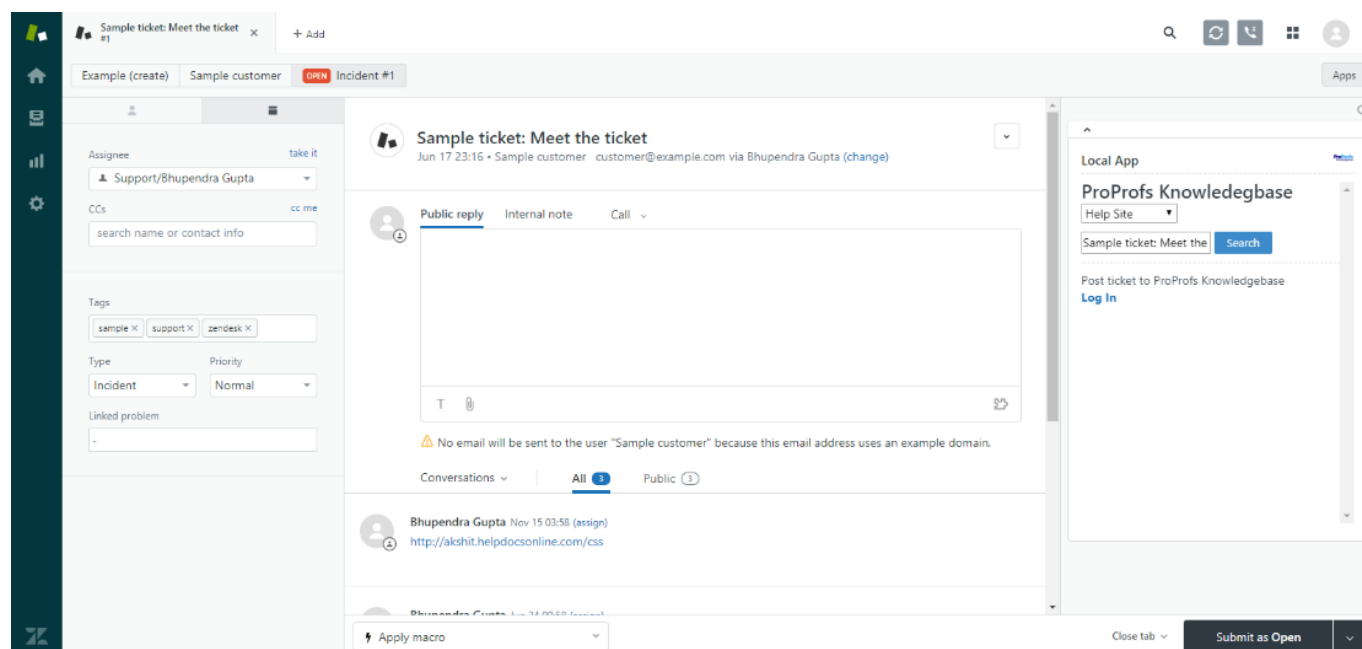
### Agent App

On 9/12/12, Zendesk released a new version of the agent/admin interface. During the beta period, this was known as 'Lotus'.

From the new agent interface ProProfs offers two integrations:

1. The ability to quickly search your ProProfs documentation from Zendesk to help solve support tickets
2. The ability to turn a support ticket into a help topic from Zendesk

The New Zendesk no longer supports widgets. It now uses Apps. Follow this guide for installing the [ProProfs App](#).



## Help Center

Zendesk released the Help Center on 8/21/13 (you can read the [announcement here](#)). It is included in all new Zendesk accounts. The Help Center is not deployed when you start a new Zendesk account. You must create it, prepare it for release, and then activate it. Many of our customers never activate the Help Center and just use ProProfs for their documentation. If you are using the Help Center you can add "[Documentation](#)" link in your Help Center's navigation that points to your ProProfs documentation. This makes it easy for your end users to access your documentation when they are in Zendesk. You can also hide this link from users who have not signed in.

You can also update your [ProProfs header](#) to match whatever header you create in the Help Center.

The screenshot displays the Zendesk Help Center interface. At the top, a dark navigation bar contains the 'HELP CENTER' logo, a home icon, and dropdown menus for 'Articles' and 'General'. The 'General' dropdown is open, showing options: 'Manage spam', 'Customize design' (highlighted with an orange arrow), and 'Help Center settings'. An orange handwritten note 'Customize your help center's design' points to the 'Customize design' option. Below the navigation bar, the main content area features a light blue header with a search bar and a row of colorful cartoon houses. A 'General' settings box is visible below the header. On the left sidebar, the 'Theme' section shows the 'Copenhagen' theme selected, with a 'Switch theme' button. The 'Appearance' section is partially visible below. At the bottom of the main content area, there is a 'Recent activity' section with the text 'No recent activities yet.' and a 'Previewing as: Manager' button.

HELP CENTER

Articles

General

Close

Publish changes

Manage spam

Customize design

Help Center settings

Customize your help center's design

Search

Copenhagen

Switch theme

Appearance

General

Recent activity

No recent activities yet.

Previewing as: Manager

**Related Articles:**

- [Search Widget](#)
- [Post Ticket Widget](#)
- [Zendesk Support Widget](#)



# Knowledge Base App for Zendesk Agents

With the Zendesk and ProProfs integration you can:

- Quickly search your ProProfs documentation from Zendesk to help solve support tickets.
- Easily turn a support ticket into a help topic from Zendesk.

## ProProfs Knowledgebase

Search

- [Add a Search Box to Zendesk Forum](#)
- [Search](#)
- [SEO search engines](#)
- [Zendesk Search Widget](#)
- [Recent Changes and Releases to HelpIQ](#)
- [Add a Documentation Tab in Zendesk](#)
- [Add and Customize a Site](#)
- [Adding Videos to a Page](#)
- [Example content](#)
- [Glossary of Terms in HelpIQ](#)
- [See all Results](#) | [Go to site](#)

Post ticket to HelpIQ

[Log In](#)

The app is only available for the new Zendesk agent console.

## Installing the app

1. Log in to your ProProfs account (as an administrator).
2. Click **Settings** in the toolbar.
3. Click Zendesk Integration.
4. Check **Turn on Zendesk Integration** to enable Zendesk Integration.
5. Copy the API key provided.
6. Log in to your Zendesk account.
7. Click on **Manage** under "Apps" and select the ProProfs app from the directory. Click on the "Install" button.
8. Fill out the following fields in the configuration page for the application:
  - **Title:** Give the application a name.
  - **URL:** Enter the URL of your default ProProfs site such as

<https://mysite.helpdocsonline.com>. Note that Zendesk only accepts HTTPS URLs for the integration process.

- **Post Ticket to ProProfs:** Select this option if you want to be able to convert a ticket into a new ProProfs page.
- **Search Options:** If you have multiple ProProfs sites, you can select the option to search all of your sites. Uncheck to only search the default site.

9. API Key: Paste in the API key.

10. Click "**Install**" to complete this process.

11. Navigate to an existing ticket and expand the "Apps" panel via the button on the top right.

12. Click the "Refresh" icon in the upper right of the "Apps" panel and the app should show up.

Whenever you load a ticket page, the ProProfs app will automatically search your ProProfs documentation. You can also turn a helpful support ticket into documentation with a single click.

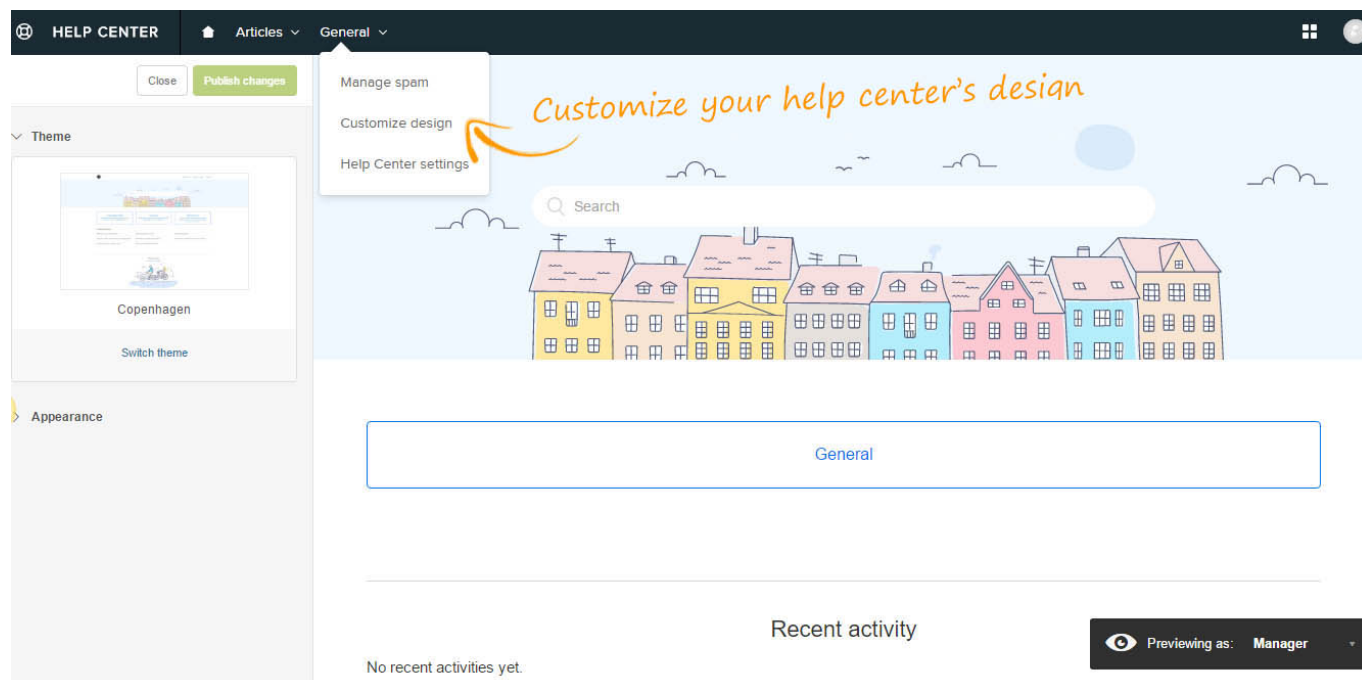
**Suggested Reading:** [Zendesk Help Center](#)

# Zendesk Help Center Integration With ProProfs Knowledge Base

This feature only available for the Zendesk Help Center. Click here to [understand the differences](#).

Zendesk released the Help Center on 8/21/13 (you can read the [announcement here](#)). It is included in all new Zendesk accounts. The Help Center is not deployed when you start a new Zendesk account. You must create it, prepare it for release, and then activate it. Many of our customers never activate the Help Center and just use ProProfs for their documentation. If you are using the Help Center you can add "Documentation" link in your Help Center's navigation that points to your ProProfs documentation. This makes it easy for your end users to access your documentation when they are in Zendesk. You can also hide this link from users who have not signed in. See [restricting access](#) below.

- [Using the Help Center and ProProfs Together](#)
- [Adding a documentation Link](#)
- [Restricting access to only logged in users](#)



## Using the Help Center and ProProfs Together

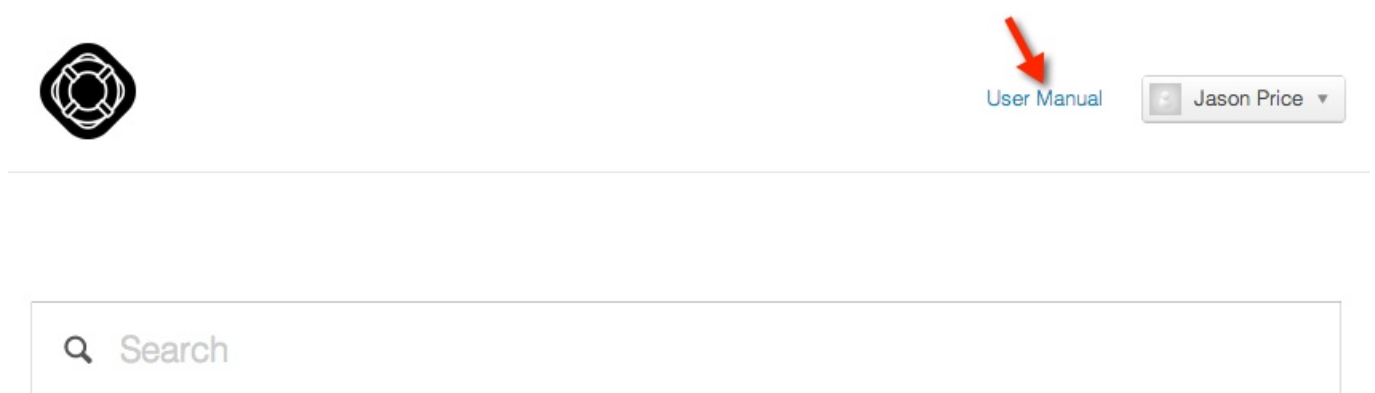
Many customers choose to use the Help Center for their FAQs and lighter documentation and

ProProfs for their product guides, support docs, and user manuals. ProProfs really excels at organizing and structuring lots of documentation. The Help Center is great for your community forum and simpler topics.

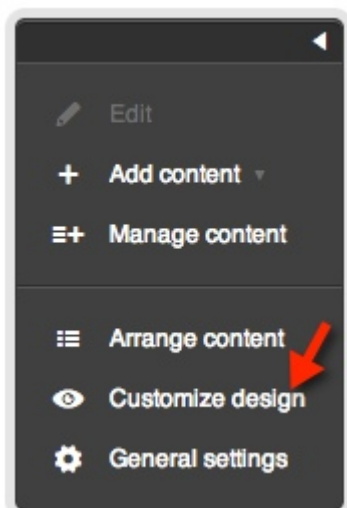
We have many customers who never activate the Help Center and just use ProProfs for their documentation. The [ProProfs app](#) allows your support agents to search your ProProfs documentation from within Zendesk with responding to support tickets.

## Adding a documentation link

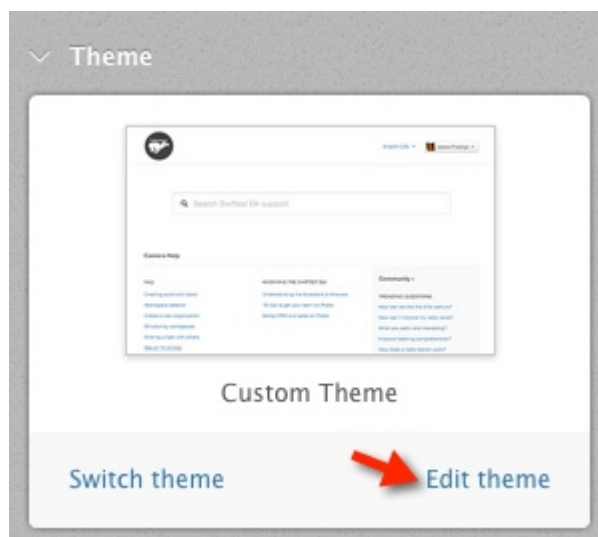
You can add a "Documentation" link in Zendesk's navigation that point to your ProProfs documentation. This makes it easy for your end users to access your documentation when they are in Zendesk.



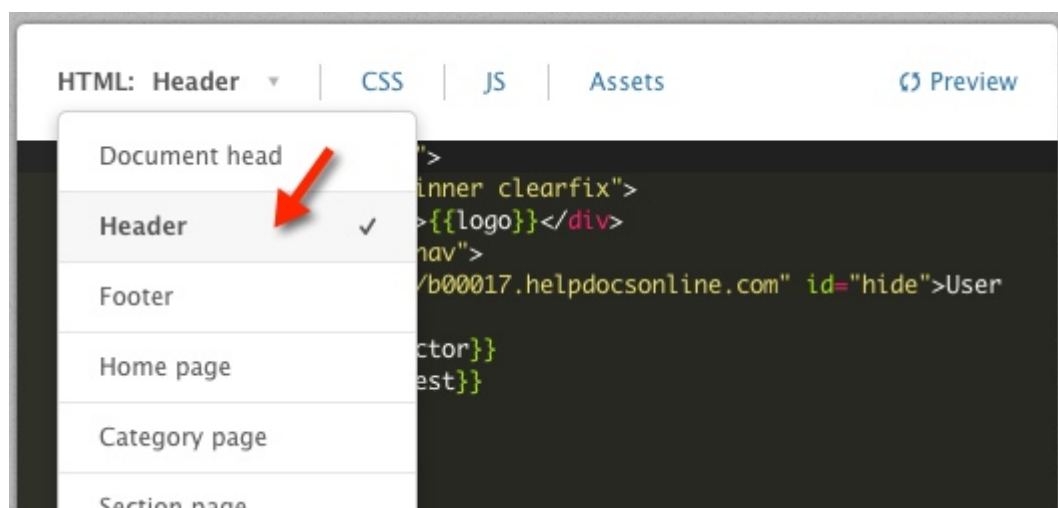
1. Log into your Zendesk Help Center
2. Click **Customize design** in the tools panel on the lower-right side of the page



3. A panel will slide open the on left side. Under Theme click **Edit theme**.

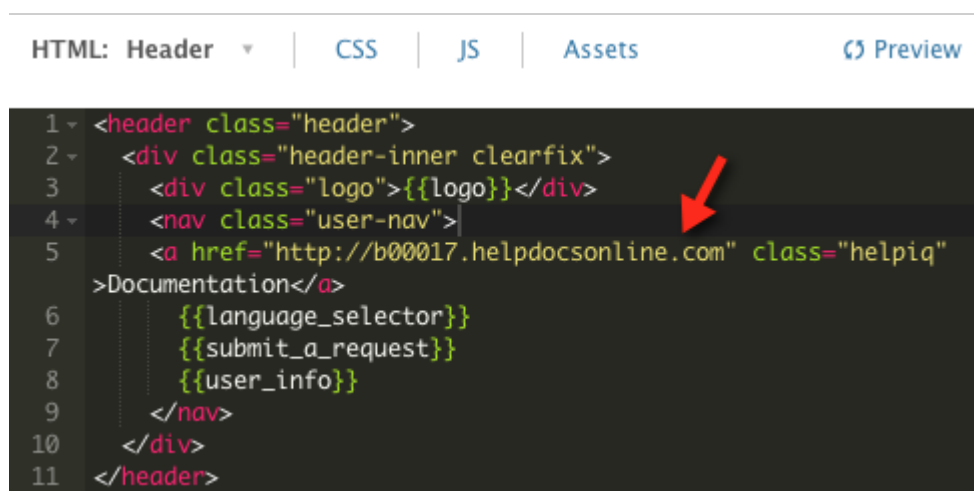


4. Select the **Header** template in the Theme editor



5. Use the code view to edit the template. Enter the following code:

```
<a href="http://mysite.helpdocsonline.com" class="helpiq" style="display:none">Documentation</a>
```



6. Replace "**mysite.helpdocsonline.com**" with the URL to your ProProfs site and

"**Documentation**" with whatever text you want the hyperlink to be named.

7. To save your changes, click **Save** at the top of the sidebar. When you're ready to deploy your changes click Publish changes at the top of the sidebar.
8. The new link will now appear in your Help Center.

## Restricting access to only logged in users

You can set up ProProfs so only **logged-in** Zendesk users (agents and/or end-users) can access and view your ProProfs documentation. If the user went directly to your documentation site without first logging in to Zendesk, they would not be able to access your documentation. Zendesk handles the authentication.

## Step 1 - Make Your ProProfs Site Private

The first step is to set your site to private.

1. Log in to your account (as an Administrator) and click **Settings**.
2. Click **Private Sites**.

The private sites page will appear.

☒ **Enable Private Sites**  
Make sites inaccessible to the general public.

\* **Make these Sites Private:**

- ☒ Email Marketing Co. - English - (United States) (default)
- ☒ test - Chinese (Simplified) - 中文 (简体中文)

**API Key**  [Regenerate](#)  
In order for your end-users to view a site the API key must be passed to HelpIQ. The API key is a shared secret between you and HelpIQ. It must never be publicized.

**Redirect URL**   
This is the URL end users will be redirected to if they try to access your site directly. It could be something like http://myapp.com/login.

**Single Sign-On** ☐ **Enable Single Sign-On**  
Single Sign-On allows you to use an existing authentication mechanism or login page (e.g., your web app or active directory) for end users to view your HelpIQ site. [Learn more.](#)

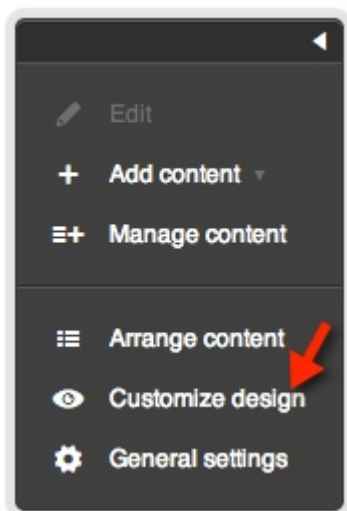
- Under Make these Sites Private select which sites you want to make private.
- You have the option of entering a redirect URL. This is the URL the end user will be redirected to when trying to access your ProProfs site directly. Since you are using Zendesk for

authentication enter the URL to your zendesk login page such as: <http://mycompany.zendesk.com/access/>

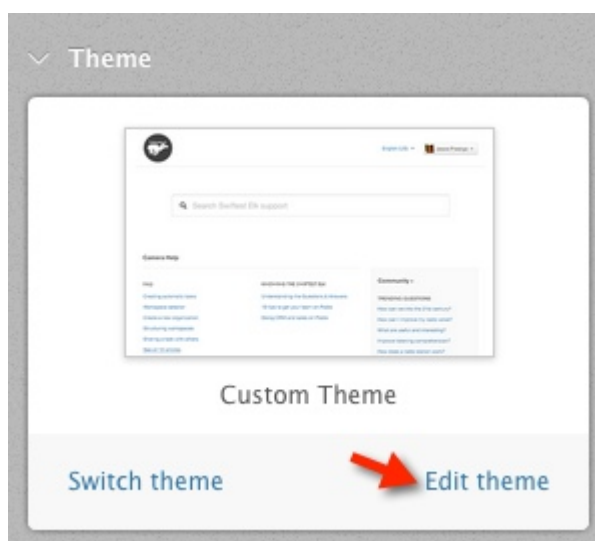
- Click **Save** to save the settings.
- The site will now be private. Learn more about [private sites](#).

## Step 2 - Configure Zendesk

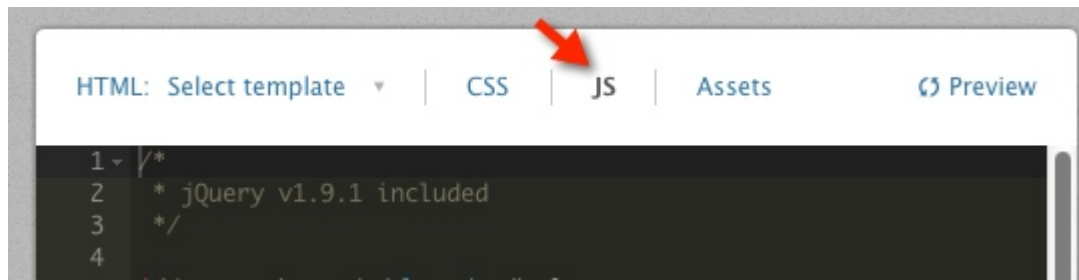
1. Add a link to your help center as [described above Documentation](#)  
Make sure you keep the class="ProProfs" in the hyperlink as this will be used to hide the link.
2. Click **Customize design** in the tools panel on the lower-right side of the page.



3. A panel will slide open the on left side. Under Theme click **Edit theme**.



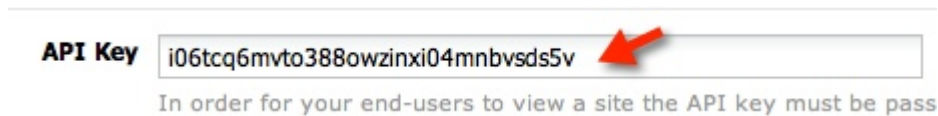
4. Select the **JS** in the Theme editor.



5. Scroll to the bottom of the Zendesk JS code and copy the below code and paste it in:

```
function authProProfs() {  
  if (HelpCenter.user.role == "anonymous") {  
    // Hide everything with class 'ProProfs'  
    jQuery('.ProProfs').hide();  
  } else {  
    // Allow logged in users to view ProProfs site  
    var ProProfs_hash = 'Private site API key';  
    var ProProfs_url = 'mysite.helpdocsonline.com';  
    jQuery.getScript('///' + ProProfs_url + '/access/remote/'+ProProfs_hash+'.js');  
    jQuery('.ProProfs').show();  
  }  
}  
$(document).ready(function(){  
  authProProfs();  
});
```

6. Log in to your ProProfs account (as an Administrator) and click **Settings** then Click **Private Sites**. The private sites page will appear. Locate your API key and copy it.



7. Now go back to Zendesk and in the code you just pasted in located the code:  
`var ProProfs_hash = 'Private site API key'` Select the text `Private site API key` the and paste in your API key, overwriting the text. Make sure you do not delete the `'` as this sytanx is needed by the javascript.
8. Now go back to Zendesk and in the code you just pasted in located the code:  
`var ProProfs_url = 'mysite.helpdocsonline.com'` and replace with your ProProfs sites URL.
9. To save your changes, click **Save** at the top of the sidebar. When you're ready to deploy your changes click Publish changes at the top of the sidebar.
10. Now the link will only be visible to logged in Zendesk users and your ProProfs site will be restricted to only logged in Zendesk users.

**Suggested Reading:** [Zendesk Agent App](#)



# Zendesk Classic

# Agent Interface

# Zendesk Search Widget

This feature is currently only available for the Classic Zendesk agent interface. [Click here for the New Zendesk](#) or to [understand the differences](#).

The Zendesk Search Widget allows you to search your ProProfs documentation from within Zendesk. This feature is a great tool for finding helpful documentation when responding to support tickets.

For example, if a customer submits a support ticket with questions about installing a printer driver, you can quickly search your ProProfs documentation, locate the help topic, then reply with the URL of the help topic in the support ticket response.

- [Step 1 - Enable Zendesk in ProProfs](#)
- [Step 2 - Add the Widget in Zendesk](#)
- [Add the Widget to a Page in Zendesk](#)
- [How the Widget Works](#)

---

## Step 1 - Enable Zendesk in ProProfs

The first step is to copy a small piece of code from ProProfs.

1. Log in to your ProProfs account (as an administrator).
2. Click **Settings** in the toolbar.
3. Click **Zendesk Integration**.
4. Check **Turn on Zendesk Integration** to enable Zendesk Integration.
5. The click on the link to go into the old Zendesk.

## Zendesk Integration << back to admin

Set up your Zendesk Integration

☒ **Turn On Zendesk Integration**

### Zendesk App

The Zendesk App allows your agent's to search your HelpIQ documentation within Zendesk. Agents can also convert Zendesk support tickets into a new help topics in HelpIQ with one simple click.

Follow this [guide for installing the Zendesk App](#). Still using the old version of Zendesk? [Click here](#)

Regenerate



6. Select all text in the **Zendesk Search Widget** box, then right-click and select **Copy**.

## Zendesk Integration << back to admin

Set up your Zendesk Integration

☒ **Turn-on Zendesk Integration**

### Zendesk Search Widget

Create a Zendesk widget to search your HelpIQ content while responding to support tickets in Zendesk.

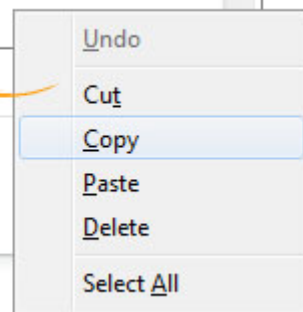
```
$j.getScript(helpiq_URL + '/js/plugins/zendesk/helpiq_search-' + helpiq_API + '.js');  
</script>  
<div id="helpiq-widget-search">The Helpiq widnaet is loading</div>
```

Copy the above code, and add a Custom Widget in Zendesk. [Learn how](#)

### Post to HelpIQ Widget

Create a Zendesk widget to post any Zendesk ticket into HelpIQ.

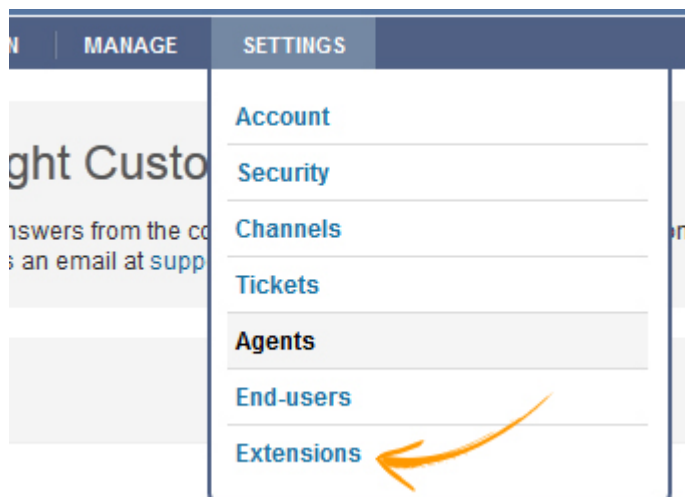
```
<script type="text/javascript">  
var helpiq_URL = "http://t01.helpdocstest.com/";
```



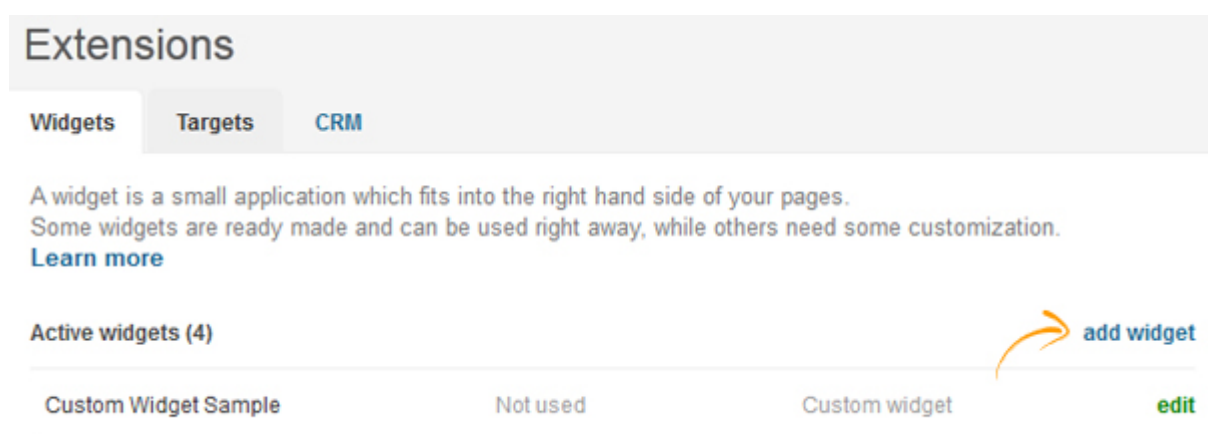
After you copy the widget code from ProProfs, log in to your Zendesk account.

## Step 2 - Add the Widget in Zendesk

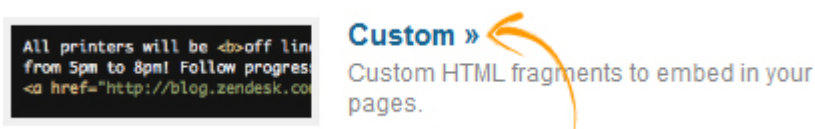
1. Log in to your Zendesk account, and select **Settings > Extensions**.



2. Select **add widget** in the right-hand corner.




3. From the list of available widgets, select **Custom**.



4. Enter the widget information.

## Custom widget

**Title**  

---

☒ **Display**

---

**Available for**

---

**Content**

```
<script type="text/javascript">
var helpiq_URL = "http://t01.helpdocsonline.com/";
var helpiq_API = "0uv02tebm2pb";
$.getScript(helpiq_URL + '/js/plugins/zendesk/helpiq_search-
'+helpiq_API+'.js');
</script>
<div id="helpiq-widget-search">The Helpiq widget is loading</div>
```

The content you want this widget to display (or contain)  
You can include dynamic content. [Click here to see how.](#)

---

- For the **Title**, enter "Search ProProfs".
- For **Available for**, leave this as is.
- In the **Content** text field, paste the code you copied from ProProfs.
- Select **Create widget** and then **Submit**.


**Note:** Make sure you change the drop-down menu selection from "Preview widget" to "Create widget."


## Add the Widget to a Page in Zendesk

Now that you have installed the Zendesk Search Widget, you will need to add it to a page in Zendesk.

1. In Zendesk under Views> My unsolved tickets, select a ticket (it doesn't matter which one).

## Ticket #2

 Kelly H – edit

 Oct-04 14:40

Subject

Welcome to Zendesk, You've Got a Ticket!

Status

Open

Type

-


Priority

-

Assignee\*

Carl Brown

Tags

 Hi there,


Thanks for your note. We're glad to see that you're testing out your trial. Now that you have access to your free 30 day trial, please feel free to sign up for one of our Zendesk 101 webinars at [www.zendesk.com/webinars](http://www.zendesk.com/webinars)


As you continue with your trial, please feel free to contact us by phone or email at any time. We look forward to hearing from you soon!


2. Select **Edit widgets on this page.**

▼ [apply macro](#) | next »


Kelly H





 [User profile – merge](#)

 [kelly.h@zendesk.com](mailto:kelly.h@zendesk.com)


Tickets

 [New, Open or Pending \(1\)](#)

 [Solved or Closed \(0\)](#)

 [Assigned to you \(1\)](#)

User notes – edit

 [Edit widgets on this page](#)

3. A list of available widgets will appear. Select **Search ProProfs.**

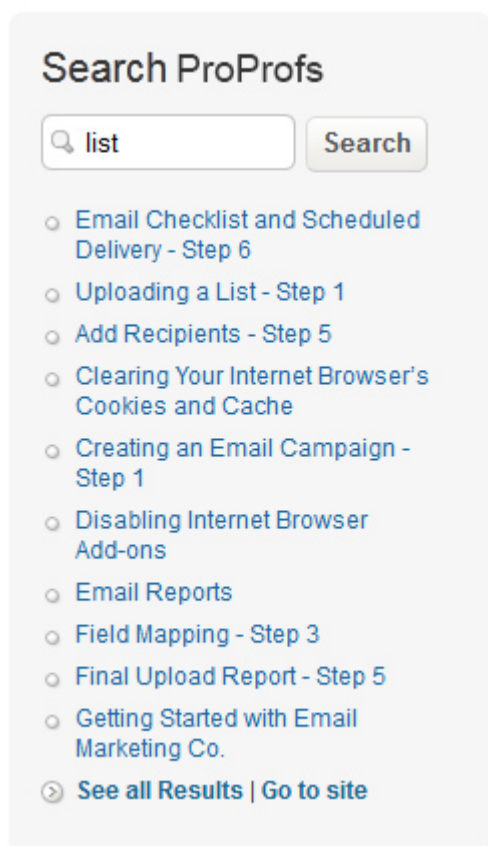


The search widget will now appear on the page.

**Note:** Each Zendesk user will need to add the widget to a page.

## How the Widget Works

When you view a ticket in Zendesk, the ticket's title will automatically be passed to the search widget and will return the top ten search results. You can also perform a new search by typing in whatever you want in the search box.





## Search Results

- When you click on a search result, two options will appear.
- **Copy link to ticket** - This will insert the URL of the help topic into the ticket.
- **Open in new window** - This will open the URL in a new browser window for you to review.

The screenshot displays a Zendesk ticket interface. On the left, a ticket conversation is visible with a message from Kelly Hastings, a Customer Advocate. The message includes a link to a Zendesk 101 webinar. Below the message, the URL <http://emailmarketingco.helpdocstest.com/#add-recipients-step-5> is shown. On the right, a 'Search ProProfs' sidebar is visible, featuring a search bar and a list of search results. The results include 'Email Checklist and Scheduled Delivery - Step 6', 'Uploading a List - Step 1', 'Add Recipients - Step 5', 'Disabling Internet Browser Add-ons', 'Email Reports', 'Field Mapping - Step 3', 'Final Upload Report - Step 5', and 'Getting Started with Email Marketing Co.'. A blue box highlights the 'Copy link to ticket' and 'Open in new window' options for the 'Add Recipients - Step 5' result. An orange arrow points from this box to the URL in the ticket conversation.

Hi there,

Thanks for your note. We're glad to see that you're testing out your trial. Now that you have access to your free 30 day trial, please feel free to sign up for one of our Zendesk 101 webinars at [www.zendesk.com/webinars](http://www.zendesk.com/webinars)

As you continue with your trial, please feel free to contact us by phone or email at any time. We look forward to hearing from you soon!

Love Your Zendesk

Kelly Hastings | Customer Advocate | +1-415-418-7506 | [support@zendesk.com](mailto:support@zendesk.com)

Latest comment by Kelly H, 27 days ago

<http://emailmarketingco.helpdocstest.com/#add-recipients-step-5>

### Search ProProfs

list Search

- o Email Checklist and Scheduled Delivery - Step 6
- o Uploading a List - Step 1
- o Add Recipients - Step 5
- o Copy link to ticket
- o Open in new window
- o Step 1
- o Disabling Internet Browser Add-ons
- o Email Reports
- o Field Mapping - Step 3
- o Final Upload Report - Step 5
- o Getting Started with Email Marketing Co.

### Related Articles:

[Post Ticket Widget](#)

[Zendesk Support Widget](#)

[Zendesk Single Sign-On](#)

# Post Ticket to ProProfs Widget

This feature is currently only available for the Classic Zendesk agent interface. Click [here](#) for the New [Zendesk](#) or to [understand the differences](#).

The Post to ProProfs Widget allows you to convert a Zendesk support ticket into a new help topic in ProProfs with one simple click. This makes it easy for support representatives to turn support tickets into help topics and knowledgebase articles.

- [Step 1 - Enable Zendesk in ProProfs](#)
- [Step 2 - Add the Widget in Zendesk](#)
- [Add the Widget to a Page in Zendesk](#)
- [How the Widget Works](#)

---

## Step 1 - Enable Zendesk in ProProfs

The first step is to copy a small piece of code from ProProfs.

1. Log in to your ProProfs account (as an administrator).
2. Click **Settings** in the toolbar.
3. Click **Zendesk Integration**.
4. Check **Turn on Zendesk Integration** to enable Zendesk Integration.
5. The click on the link to go into the old Zendesk.

**Zendesk Integration** << back to admin

Set up your Zendesk Integration

☒ **Turn On Zendesk Integration**

**Zendesk App**

The Zendesk App allows your agent's to search your HelpIQ documentation within Zendesk. Agents can also convert Zendesk support tickets into a new help topics in HelpIQ with one simple click.

Follow this [guide for installing the Zendesk App](#). Still using the old version of Zendesk? [Click here](#)

[Regenerate](#)

6. Select all text in the **Post to ProProfs Widget** box, then right-click and select **Copy**.

Create a Zendesk widget to post any Zendesk ticket

```
$j.getScript(helpiq_URL + '/js/plugins/zendesk/helpiq_post-'+helpiq_API+'.js?user='+helpiq_user);  
</script>  
<div id="helpiq-widget-post">The Helpiq widget is loading</div>
```

Copy the above code, and add a Custom Widget in Zendesk. [Learn how.](#)

### Zendesk Header

Make HelpIQ's header match Zendesk for a seamless blend. [Click here](#), and select "Z

Undo

Cut

Copy

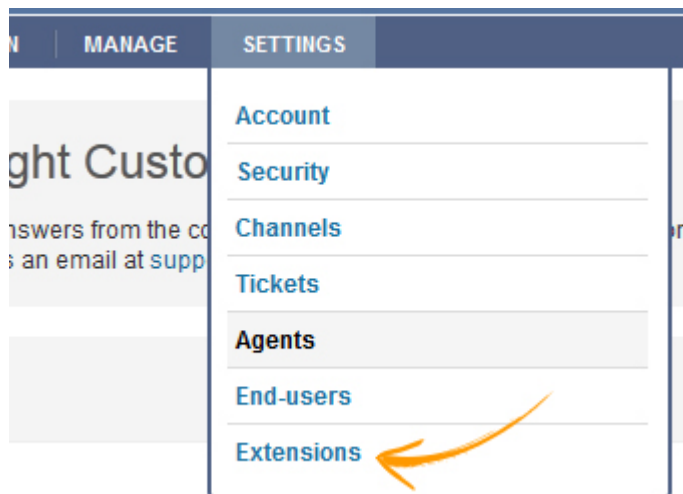
Paste

Delete

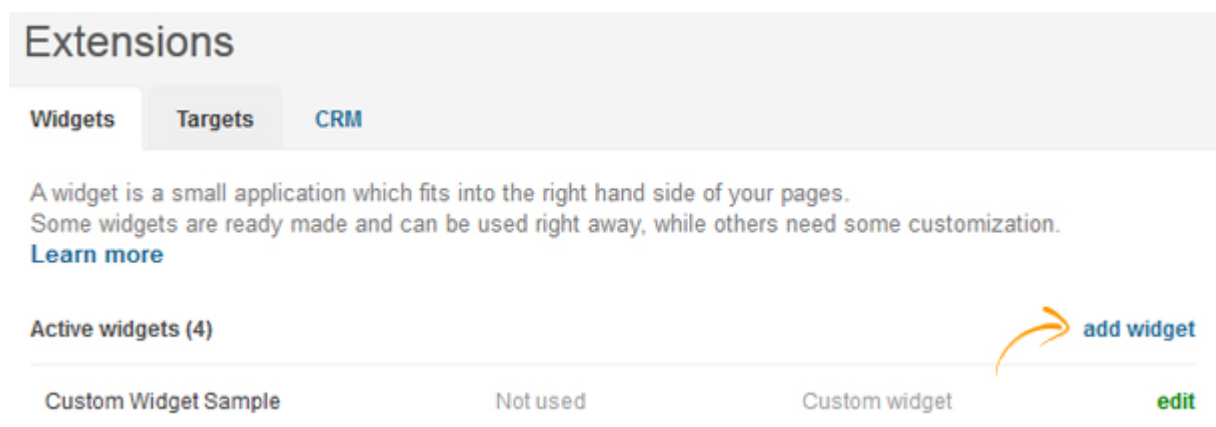
## Step 2 - Add the Widget in Zendesk

After you copy the widget code from ProProfs, log in to your Zendesk account.

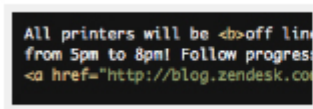
1. Log in to your Zendesk account, and select **Settings > Extensions**.



2. Select **add widget** in the right-hand corner.



3. From the list of available widgets, select **Custom**.



**Custom »**  
Custom HTML fragments to embed in your pages.

#### 4. Enter the widget information.

A screenshot of the 'Custom widget' configuration form in Zendesk. The form has a title 'Custom widget' and several fields: 'Title' with the value 'Post to ProProfs', 'Display' checked, 'Available for' set to 'People who have logged in and are agents', and 'Content' containing a JavaScript snippet. An orange arrow points to the 'Title' field. Below the form, there is a note: 'The content you want this widget to display (or contain)' and a link 'You can include dynamic content. Click here to see how.'

**Custom widget**

**Title**

☒ **Display**

**Available for**

**Content**

```
<script type="text/javascript">
var helpiq_URL = "http://emailmarketingco.helpdocstest.com/";
var helpiq_API = "yw1zdslltysc";
var helpiq_user = currentUser.email;
$.getScript(helpiq_URL + '/js/plugins/zendesk/helpiq_post-
'+helpiq_API+'.js?user='+helpiq_user);
</script>
<div id="helpiq-widget-post">The Helpiq widget is loading</div>
```

The content you want this widget to display (or contain)

You can include dynamic content. [Click here to see how.](#)

- For the **Title** enter "Post to ProProfs".
- For **Available for**, leave this as is.
- In the **Content** text field, paste the code you copied from ProProfs.
- Select **Create Widget** and then **Submit**

Make sure you change the drop-down menu selection from "Preview widget" to "Create widget."

#### Add the Widget to a Page in Zendesk

Now that you have installed the Post to ProProfs Widget, you will need to add it to a page in Zendesk.

1. In Zendesk under Views> My unsolved tickets, select a ticket (it doesn't matter which one).

## Ticket #2

Kelly H – edit | Oct-04 14:40

**Subject**

Welcome to Zendesk, You've Got a Ticket!

**Status** Open **Type** - **Priority** - **Assignee\*** Carl Brown

**Tags**

Hi there,

Thanks for your note. We're glad to see that you're testing out your trial. Now that you have access to your free 30 day trial, please feel free to sign up for one of our Zendesk 101 webinars at [www.zendesk.com/webinars](http://www.zendesk.com/webinars)

As you continue with your trial, please feel free to contact us by phone or email at any time. We look forward to hearing from you soon!

2. Select **Edit widgets on this page**.

▼ [apply macro](#) | next »


**Kelly H**

User profile – merge  
kelly.h@zendesk.com

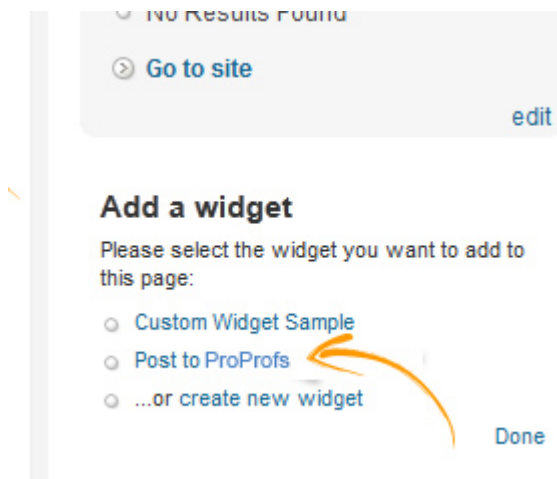
**Tickets**

- New, Open or Pending (1)
- Solved or Closed (0)
- Assigned to you (1)

User notes – edit

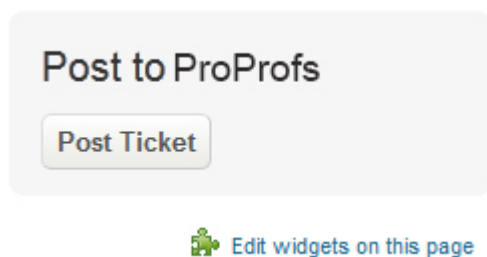
 [Edit widgets on this page](#)

3. A list of available widgets will appear. Select **Search ProProfs**.



The widget will now appear on the page.

**Note:** Each Zendesk user will need to add the widget to a page.

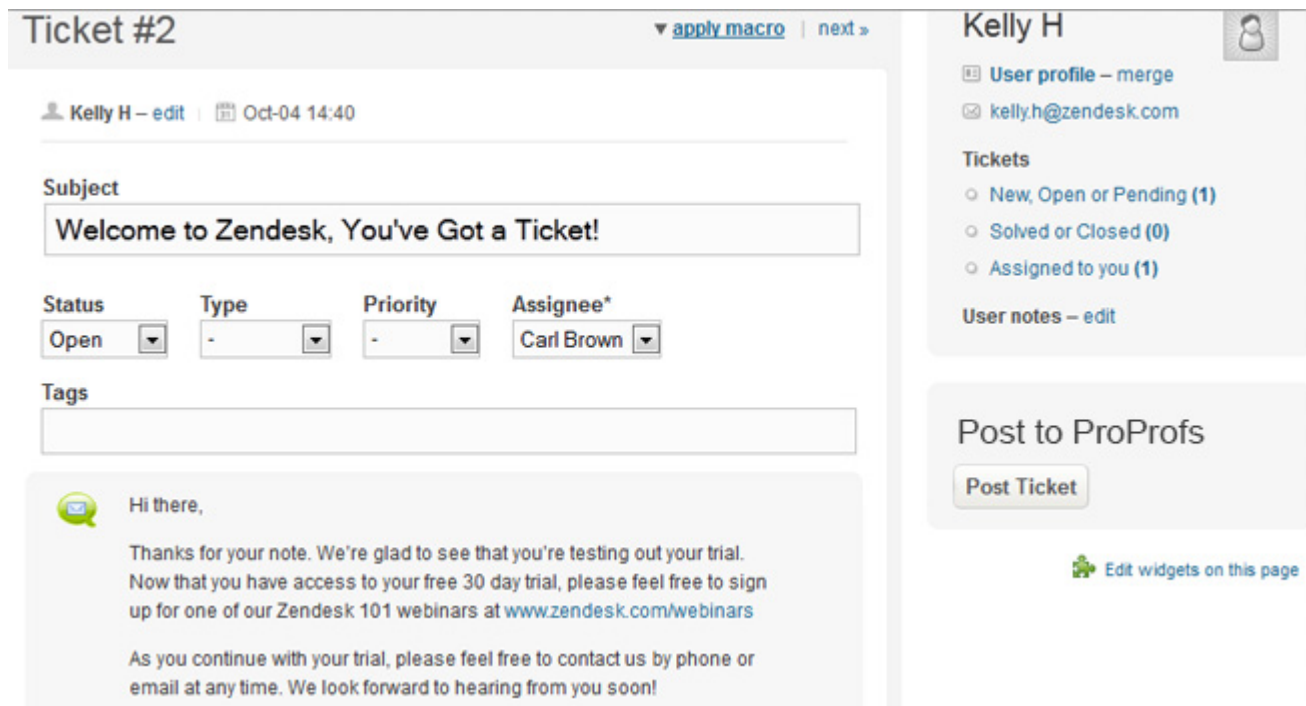


## How the Widget Works

The post widget will allow you to turn a Zendesk support ticket into a help topic in ProProfs.

When viewing a ticket in Zendesk, all you have to do is click **Post Ticket**. (Clicking Post Ticket will open up a new browser window. Make sure your pop-up blocker is not blocking the window.)





**Ticket #2** [▼ apply macro](#) | [next »](#)

Kelly H – [edit](#) | Oct-04 14:40

**Subject**

Welcome to Zendesk, You've Got a Ticket!

**Status** Open **Type** - **Priority** - **Assignee\*** Carl Brown

**Tags**

Hi there,

Thanks for your note. We're glad to see that you're testing out your trial. Now that you have access to your free 30 day trial, please feel free to sign up for one of our Zendesk 101 webinars at [www.zendesk.com/webinars](http://www.zendesk.com/webinars)

As you continue with your trial, please feel free to contact us by phone or email at any time. We look forward to hearing from you soon!

**Kelly H**

[User profile – merge](#)  
[kelly.h@zendesk.com](mailto:kelly.h@zendesk.com)

**Tickets**

- New, Open or Pending (1)
- Solved or Closed (0)
- Assigned to you (1)

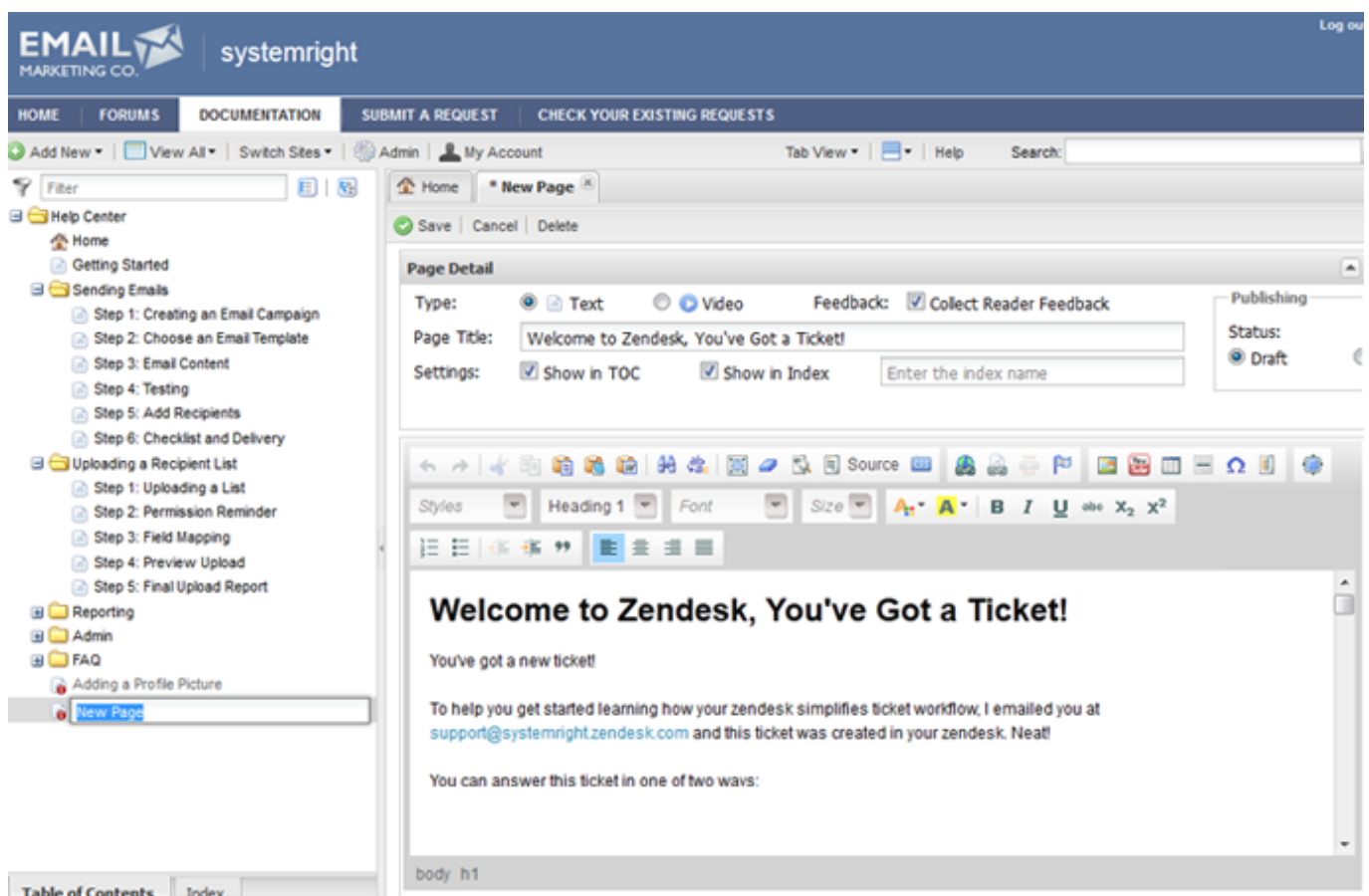
[User notes – edit](#)

**Post to ProProfs**

[Post Ticket](#)

[Edit widgets on this page](#)

The ticket information will populate in a new ProProfs page where you can edit it. It will copy all the information from the ticket, including signatures, names, comments, phone numbers, etc., so you will want to remove whatever information you don't want to display in ProProfs. You may also want to change the formatting and styles.



**EMAIL MARKETING CO.** | **systemright** [Log out](#)

**HOME** | **FORUMS** | **DOCUMENTATION** | **SUBMIT A REQUEST** | **CHECK YOUR EXISTING REQUESTS**

[Add New](#) | [View All](#) | [Switch Sites](#) | [Admin](#) | [My Account](#) | [Tab View](#) | [Help](#) | [Search](#)

**Filter**

**Help Center**

- Home
- Getting Started
- Sending Emails
  - Step 1: Creating an Email Campaign
  - Step 2: Choose an Email Template
  - Step 3: Email Content
  - Step 4: Testing
  - Step 5: Add Recipients
  - Step 6: Checklist and Delivery
- Uploading a Recipient List
  - Step 1: Uploading a List
  - Step 2: Permission Reminder
  - Step 3: Field Mapping
  - Step 4: Preview Upload
  - Step 5: Final Upload Report
- Reporting
- Admin
- FAQ
- Adding a Profile Picture
- New Page**

**Page Detail**

Type: ☒ Text ☐ Video Feedback: ☒ Collect Reader Feedback

Page Title: Welcome to Zendesk, You've Got a Ticket!

Settings: ☒ Show in TOC ☒ Show in Index Enter the index name

Publishing Status: ☒ Draft

**Welcome to Zendesk, You've Got a Ticket!**

You've got a new ticket!

To help you get started learning how your zendesk simplifies ticket workflow, I emailed you at [support@systemright.zendesk.com](mailto:support@systemright.zendesk.com) and this ticket was created in your zendesk. Neat!

You can answer this ticket in one of two ways:

body h1

[Table of Contents](#) | [Index](#)

Once you are done editing the page, click **Save**.

### Related Articles:

[Search Widget](#)

[Zendesk Support Widget](#)

[Zendesk Single Sign-On](#)

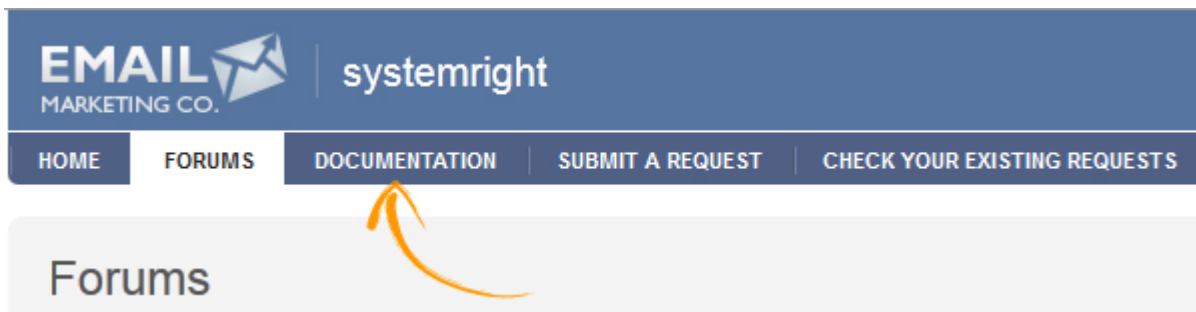


# Web Portal

# Add a Documentation Tab in Zendesk

This feature is only available in the Zendesk Classic Web Portal. [Click here to understand the differences.](#)

You can add a "Documentation" tab in Zendesk's navigation that points to your ProProfs documentation. This makes it easy for your end users to access your documentation when they are in Zendesk. You can also [customize ProProfs's header](#) to match Zendesk for a seamless experience.



- [Step 1 - Enable Zendesk in ProProfs](#)
- [Step 2 - Add in Zendesk](#)
- [How the Code Works](#)
- [Show/Hide Based on End-user Tags](#)

## Step 1 - Enable Zendesk in ProProfs

The first step is to copy a small piece of code from ProProfs.

1. Log in to your ProProfs account (as an administrator).
2. Click **Settings** in the toolbar.
3. Click **Zendesk Integration**.
4. Check **Turn on Zendesk Integration** to enable Zendesk Integration.
5. The click on the link to go into the old Zendesk.

## Zendesk Integration << back to admin

Set up your Zendesk Integration

☒ **Turn On Zendesk Integration**

### Zendesk App

The Zendesk App allows your agent's to search your HelpIQ documentation within Zendesk. Agents can also convert Zendesk support tickets into a new help topics in HelpIQ with one simple click.

Follow this [guide for installing the Zendesk App](#). Still using the old version of Zendesk? [Click here](#)

Regenerate



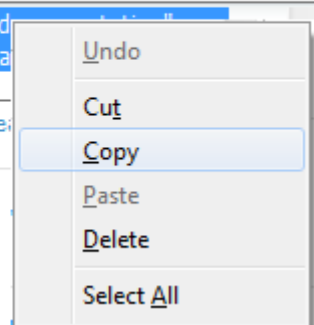
6. Select all text in the **Documentation Tab** box, then right-click and select **Copy**.

### Documentation Tab

Add a "Documentation" tab to your Zendesk's navigation to link to your HelpIQ site.

```
jQuery("div#top-menu ul#green li.tab_forums").after('<li class="main tab_d  
class="tab" href="http://emailmarketingco.helpdocstest.com/">Documenta  
if (jQuery("#div#top-menu ul#green li.tab_forums.active").length) {
```

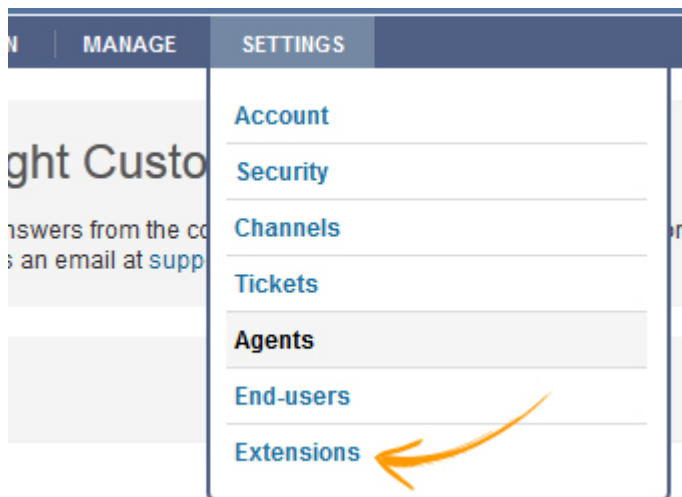
Copy the above code, and add a Global Javascript Widget in Zendesk. Le



## Step 2 - Add the Widget in Zendesk

After you copy the code from ProProfs, log in to your Zendesk account.

1. Log in to your Zendesk account, and select **Settings > Extensions**.



2. Select **add widget** in the right-hand corner.

## Extensions

Widgets


Targets

CRM

A widget is a small application which fits into the right hand side of your pages. Some widgets are ready made and can be used right away, while others need some customization.

[Learn more](#)

Active widgets (4)

 **add widget**

Custom Widget Sample

Not used

Custom widget

**edit**

- From the list of available widgets, select **Global JavaScript**.

```
var TextWidget = Class.create(Wi,
  initialize: function($super, a
    $super(args);
    this.output = args.output;
```

**Global JavaScript »**

Execute your own JavaScript in your help desk pages.

- Enter the widget information.

## JavaScript widget

Title

ProProfs Tab

Available for

Anyone, including people who have not logged in

Content

```
jQuery("div#top-menu ul#green li.tab_forums").after("<li
class='main tab_documentation'><a class='tab'
href='http://emailmarketingco.helpdocstest.com
/'>Documentation</a></li>");
```

The JavaScript content you want to insert into all pages

Please note that Zendesk cannot guarantee that existing page markup and the Zendesk **DOM** will stay unaltered. We do strive to keep changes minimal on end-user-facing pages, and will not make any major changes without due notice.

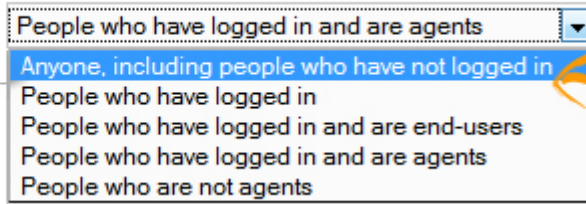
Create widget

**Submit**

- For the **Title** enter "ProProfs Tab".
- For **Available for** select who you want to be able to see the documentation tab.

Available for

Content



- In the **Content** text field, paste the code you copied from ProProfs.
- Select **Create Widget** and then **Submit**.

Make sure you change the drop-down menu selection from "Preview widget" to "Create widget."

## How the Code Works

The system will provide you with the exact code script you need so you don't have to worry about changing anything. However, we have provided an explanation of the script below, just in case you want to tweak something.

```
// URL to your helpIQ site
var helpiq_URL = document.location.protocol + "///docs.helpdocsonline.com";
//This sets the tab to appear after the forum tab.
//You can change this to whatever order you want tab_home, tab_forums, tab_new, tab_requests
jQuery("div#top-menu ul#green li.tab_forums").after('<li class="main tab_documentation">
//You can change "Documentation" to whatever you want
<a class="tab" href="'+helpiq_URL+'">Documentation</a></li>');
//Makes everything look right when the forum tab is selected. Do not alter.
if (jQuery("div#top-menu ul#green li.tab_forums.active").length) {
    jQuery("div#top-menu ul#green li.first").removeClass("first");
    jQuery("div#top-menu ul#green li.tab_documentation").addClass("first");
}
```

## Show/Hide Based on User Tags

- In Zendesk you can [tag users](#) and organizations.
- Lets say you have developer guides in ProProfs and you want to add a tab in Zendesk linking to it.
- However, you only want the tab to appear for Zendesk users that are tagged "developer" or "premium"
- You can accomplish by wrapping the below code around the documentation code. Change the tags 'premium' and 'developer' to whatever tags you want the tab to appear for.

```
(function() {
if (currentUser.tags.indexOf('premium','developer') >= 0 ) {
//paste documentation tab code here
```

```
}}  
());
```

Looks like this:

```
(function() {  
  if (currentUser.tags.indexOf('premium','developer') >= 0 ) {  
    //documentation tab code here  
    var helpiq_URL = document.location.protocol + "///docs.helpdocsonline.com";  
    jQuery("div#top-menu ul#green li.tab_forums").after('<li class="main tab_documentation">  
<a class="tab" href="'+helpiq_URL+'">Documentation</a></li>');  
    if (jQuery("div#top-menu ul#green li.tab_forums.active").length) {  
      jQuery("div#top-menu ul#green li.first").removeClass("first");  
      jQuery("div#top-menu ul#green li.tab_documentation").addClass("first");  
    }  
  }  
}}  
());
```

#### Related Articles:

[Zendesk Header](#)

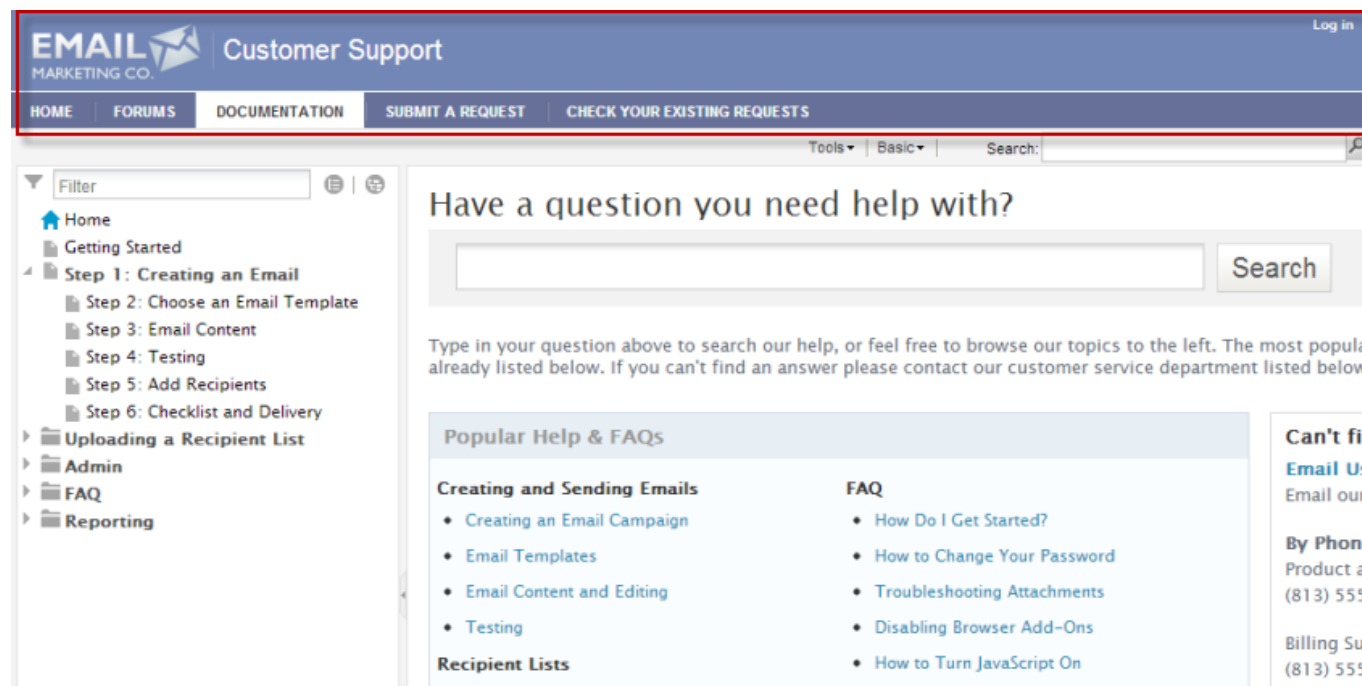
[Zendesk Support Widget](#)

[Zendesk Single Sign-On](#)

# Zendesk Header

This feature only available to Classic Zendesk Web Portal. [Click here to understand the differences.](#)

You can customize ProProfs's top header to match Zendesk's for a seamless user experience. Your end users will never have a clue they are going between Zendesk and ProProfs. If you haven't already done so, you can add a [documentation tab](#) in Zendesk linking to ProProfs.



(The header matches the exact Zendesk header.)

- [Adding the Zendesk Header](#)

## Adding the Zendesk Header

1. Log in to your ProProfs account (as an administrator), and click **Settings** in the toolbar.
2. Click **Add, Edit, Customize Sites**.
3. Select the default site.
4. Under the Site Header section, select **Zendesk Header**.

**Site Header** ☐ Use Default ☐ Use Your Own Header (Custom HTML/CSS) ☒ **Zendesk Header**

**Zendesk URL** http://  .zendesk.com

5. In the Zendesk URL box, enter the URL of your Zendesk site. For example "systemright" (do not add the full URL, "http://" or "www").
6. Then click the **Load Header** button.

**Site Header** ☐ Use Default ☐ Use Your Own Header (Custom HTML/CSS) ☒ **Zendesk Header**

**Zendesk URL** http://  .zendesk.com

Your Zendesk header should immediately load in ProProfs. (If you have problems or something does not look right, try clicking the **Load Header** button again.) Several fields will now appear.

**Zendesk URL** http://  .zendesk.com

**CSS Code** [Learn about custom headers](#)

```
@import "http://systemright.zendesk.com/generated/stylesheets/branding/1078/107839/1320184689.css";
```

#### HTML Code

```
<div id="zendesk-header">
  <div id="header">
    <div id="top-right">{login}</div>
    <div id="header_container">
      <table id="table_header"><tr><td> </td>
```

You can use {login} in your HTML code where you want the log-in/log-out link to appear

**Header Height**  pixels. This will be the height in pixels

- **CSS Code** - This is a link to the CSS file from Zendesk.
- **HTML Code** - This is the HTML code for the header. If you are familiar with XHTML, you can change some of the links and link names. This is important if you changed the link names in



Zendesk.

- **Header Height** - The system will try to guess the header height automatically. However, if the header looks cut off, try increasing the header height manually using this field.

Click **Save** to finish and apply the new header.

#### Related Articles:

[Forum Search](#)

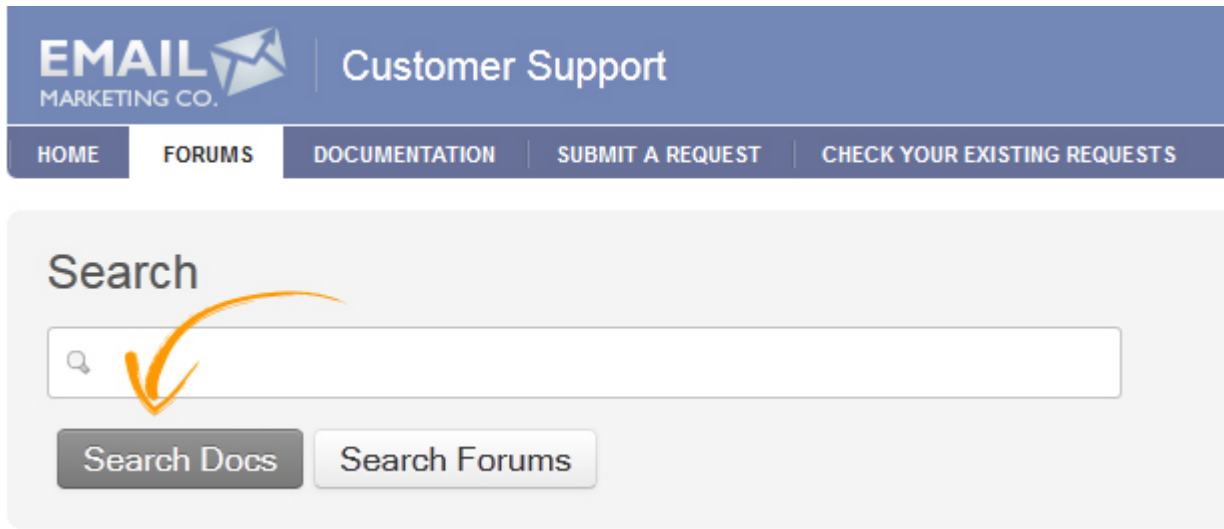
[Zendesk Support Widget](#)

[Zendesk Single Sign-On](#)

# Add a Search Box to Zendesk Forum

This feature only available to Zendesk Classic Web Portal. [Click here to understand the differences.](#)

You can add a search button to your Zendesk forum site for your end users to search your ProProfs documentation. When a user submits the form they will be taken to your ProProfs site and the search results will be displayed.

The screenshot shows the top navigation bar of the 'EMAIL MARKETING CO.' website, with 'Customer Support' as the main heading. Below this is a menu with links: HOME, FORUMS, DOCUMENTATION, SUBMIT A REQUEST, and CHECK YOUR EXISTING REQUESTS. The 'FORUMS' link is highlighted. Below the menu is a search section titled 'Search'. It contains a search input field with a magnifying glass icon, an orange arrow pointing to it, and two buttons: 'Search Docs' and 'Search Forums'.

- [Step 1 - Enable Zendesk in ProProfs](#)
- [Step 2 - Add the Widget in Zendesk](#)

---

## Step 1 - Enable Zendesk in ProProfs

The first step is to copy a small piece of code from ProProfs.

1. Log in to your ProProfs account (as an administrator).
2. Click **Settings** in the toolbar.
3. Click **Zendesk Integration**.
4. Check **Turn on Zendesk Integration** to enable Zendesk Integration.
5. The click on the link to go into the old Zendesk.

## Zendesk Integration << back to admin

Set up your Zendesk Integration

☒ **Turn On Zendesk Integration**

### Zendesk App

The Zendesk App allows your agent's to search your HelpIQ documentation within Zendesk. Agents can also convert Zendesk support tickets into a new help topics in HelpIQ with one simple click.

Follow this [guide for installing the Zendesk App](#). Still using the old version of Zendesk? [Click here](#)

Regenerate



6. Select all text in the **Forum Search** box, then right-click and select **Copy**.

### Zendesk Forum Search

Add a search documentation button to your Zendesk forum site.

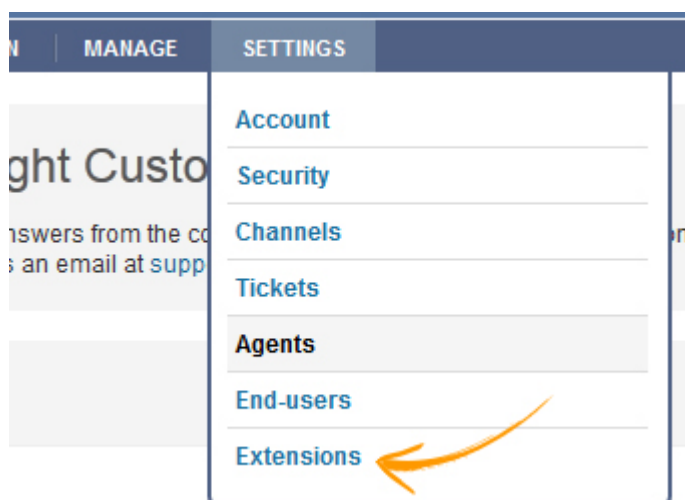
```
var helpiq_URL = document.location.protocol + "//help.youremailco.com";  
var helpiq_API = "b4gho65v6agq";  
$.getScript(helpiq_URL + '/js/plugins/zendesk/helpiq_home_search-'+helpiq_API+'.js');
```

Copy the above code, and add a Global Javascript Widget in Zendesk. [Learn how.](#)

## Step 2 - Add the Widget in Zendesk

After you copy the code from ProProfs, log in to your Zendesk account.

1. Log in to your Zendesk account, and select **Settings > Extensions**.



2. Select **add widget** in the right-hand corner.

## Extensions

Widgets

Targets

CRM

A widget is a small application which fits into the right hand side of your pages.  
Some widgets are ready made and can be used right away, while others need some customization.

[Learn more](#)

Active widgets (4)

[add widget](#)

Custom Widget Sample

Not used

Custom widget

[edit](#)

3. From the list of available widgets, select **Global JavaScript**.

```
var TextWidget = Class.create(Wi,
  initialize: function($super, a
    $super(args);
    this.output = args.output;
```

**Global JavaScript »**

Execute your own JavaScript in your help desk pages.

4. Enter the widget information.

## JavaScript widget

Title

Search Forum

Available for

People who have logged in and are agents

Content

```
var helpiq_URL = document.location.protocol + "///help.youremailco.com";
var helpiq_API = "b4gho65v6agq";
$.getScript(helpiq_URL + '/js/plugins/Zendesk/helpiq_home_search-
'+helpiq_API+'.js');
```

The JavaScript content you want to insert into all pages

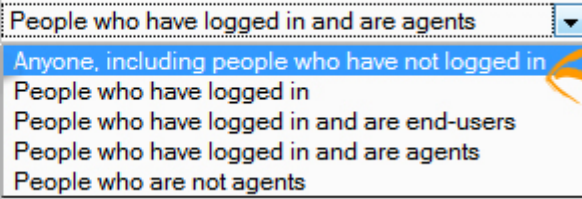
Note that Zendesk cannot guarantee that existing page markup and the Zendesk **DOM** will stay unaltered. We strive to keep changes minimal on end-user-facing pages and we do not make any major changes without due notice.

Create widget

[Submit](#)

- For the **Title** enter "ProProfs Forum Search".
- For **Available for**, change to **Anyone, including people who have not logged in**.

Available for



A screenshot of a web form showing a dropdown menu. The dropdown is open, displaying a list of options. The first option, 'Anyone, including people who have not logged in', is highlighted in blue. An orange arrow points from the right side of the image to this highlighted option. The other options in the list are 'People who have logged in and are agents', 'People who have logged in', 'People who have logged in and are end-users', 'People who have logged in and are agents', and 'People who are not agents'.

- People who have logged in and are agents
- Anyone, including people who have not logged in
- People who have logged in
- People who have logged in and are end-users
- People who have logged in and are agents
- People who are not agents

Content

- In the **Content** text field, paste the code you copied from ProProfs.
- Select **Create Widget** and then **Submit**.

**Note:** Make sure you change the drop-down menu selection from "Preview widget" to "Create widget."

#### Related Articles:

[Documentation Tab](#)

[Zendesk Support Widget](#)

[Zendesk Single Sign-On](#)

# Restricting Access to Logged-in Zendesk Users

This feature only available to Zendesk Classic Web Portal. Click here to [understand the differences](#).

You can set up ProProfs so only **logged-in** Zendesk users can access and view your documentation. If an end user went directly to your documentation site without first logging in to Zendesk, the end user would not be able to access your documentation. Zendesk handles the authentication of your end users.

- [Step 1 - Make Your Site Private](#)
- [Step 2 - Add a Documentation Tab to Zendesk](#)

## Step 1 - Make Your Site Private

The first step is to set your site to private.

1. Log in to your account (as an Administrator) and click **Settings**.
2. Click **Private Sites**.

The private sites page will appear.

☒ **Enable Private Sites**  
Make sites inaccessible to the general public.

**\* Make these Sites Private:**

- ☒ Email Marketing Co. - English - (United States) (default)
- ☒ test - Chinese (Simplified) - 中文 (简体中文)

**API Key**  [Regenerate](#)

In order for your end-users to view a site the API key must be passed to HelpIQ. The API key is a shared secret between you and HelpIQ. It must never be publicized.

**Redirect URL**

This is the URL end users will be redirected to if they try to access your site directly. It could be something like http://myapp.com/login.

**Single Sign-On** ☐ **Enable Single Sign-On**

Single Sign-On allows you to use an existing authentication mechanism or login page (e.g., your web app or active directory) for end users to view your HelpIQ site. [Learn more.](#)

- Under **Make these Sites Private** select which sites you want to make private.
- You have the option of entering a **redirect URL**. This is the URL the end user will be redirected

to when trying to access your ProProfs site directly. It could be your web application's login page, for example, <http://myapp.com/login>.

- **Save** - Click Save to save the settings.
- **Cancel** - Click Cancel to return to the Settings page without saving these settings.

The site will now be private. Learn more about [private sites](#).

## Step 2 - Add a Documentation Tab to Zendesk

You can add a **Documentation tab** in Zendesk's navigation that points to your ProProfs documentation. You can make it so this tab is **ONLY** visible to logged-in Zendesk users. In this case, Zendesk would handle the authentication of your end users. Logged-out users will not see the documentation tab and thus will not be able to access your ProProfs documentation.

Here are the steps showing how to add a documentation tab:


1. Log in to your ProProfs account (as an administrator).
2. Click **Settings** in the toolbar.
3. Click **Zendesk Integration**.
4. Check **Turn on Zendesk Integration** to enable integration with Zendesk.
5. The click on the link to go into the old Zendesk.

**Zendesk Integration** << [back to admin](#)  
Set up your Zendesk Integration

☒ **Turn On Zendesk Integration**

**Zendesk App**  
The Zendesk App allows your agent's to search your HelpIQ documentation within Zendesk. Agents can also convert Zendesk support tickets into a new help topics in HelpIQ with one simple click.  
Follow this [guide for installing the Zendesk App](#). Still using the old version of Zendesk? [Click here](#)

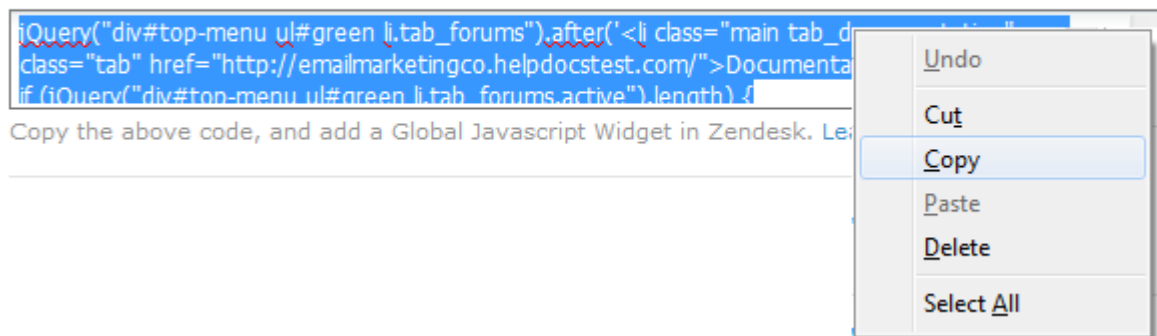
[Regenerate](#)



1. Select all the text in the **Documentation Tab** box, then right click and select **Copy**.

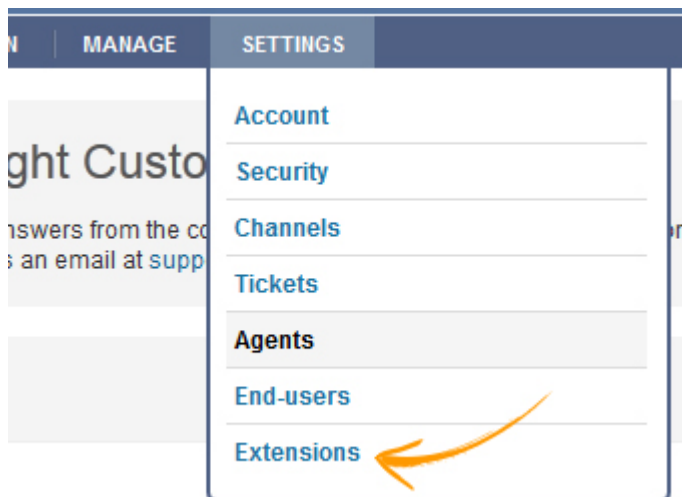
## Documentation Tab

Add a "Documentation" tab to your Zendesk's navigation to link to your HelpIQ site.

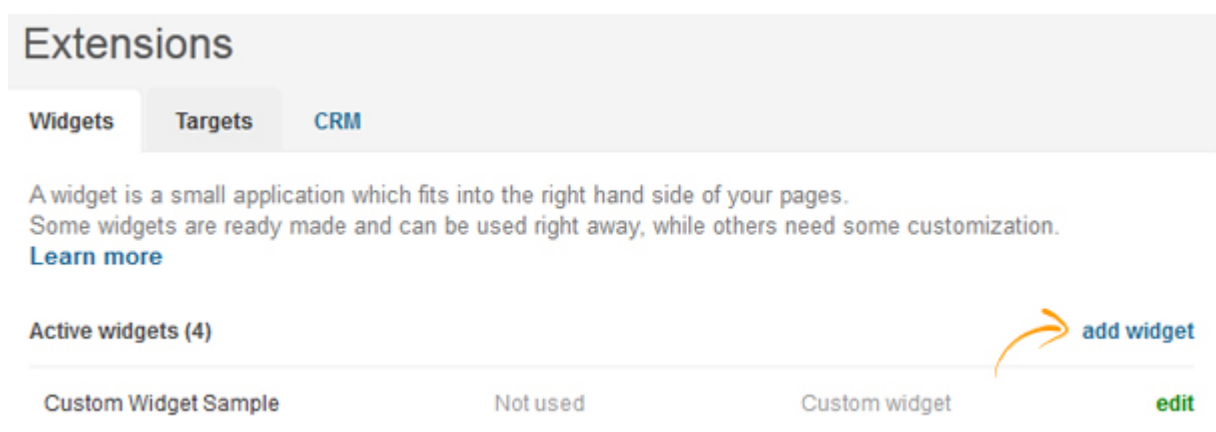


After you copy the code from ProProfs, log in to your Zendesk account.

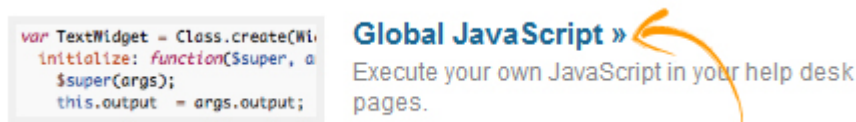
1. Log in to your Zendesk account, and select **Settings > Extensions**.



2. Select **add widget** in the right-hand corner.



3. From the list of available widgets, select **Global JavaScript**.





4. Enter the widget information.

## JavaScript widget

Title

ProProfs Tab

Available for

Anyone, including people who have not logged in

Content

```
jQuery("div#top-menu ul#green li.tab_forums").after('<li  
class="main tab_documentation"><a class="tab"  
href="http://emailmarketingco.helpdocstest.com  

```

The JavaScript content you want to insert into all pages

Please note that Zendesk cannot guarantee that existing page markup and the Zendesk **DOM** will stay unaltered. We do strive to keep changes minimal on end-user-facing pages, and will not make any major changes without due notice.

Create widget

Submit

- For the **Title** enter "ProProfs Tab".
- For **Available for**, change to **People who have logged in** (or one of the other logged-in statuses).

Title

Documentation Tab

Available for

People who have logged in and are agents  
Anyone, including people who have not logged in  
**People who have logged in**  
People who have logged in and are end-users  
People who have logged in and are agents  
People who are not agents

Content

- In the **Content** text field, paste the code you copied from ProProfs.
- Select **Create Widget** and then **Submit**.

**Note:** Make sure you change the drop-down menu selection from "Preview widget" to "Create widget."

#### Related Articles:

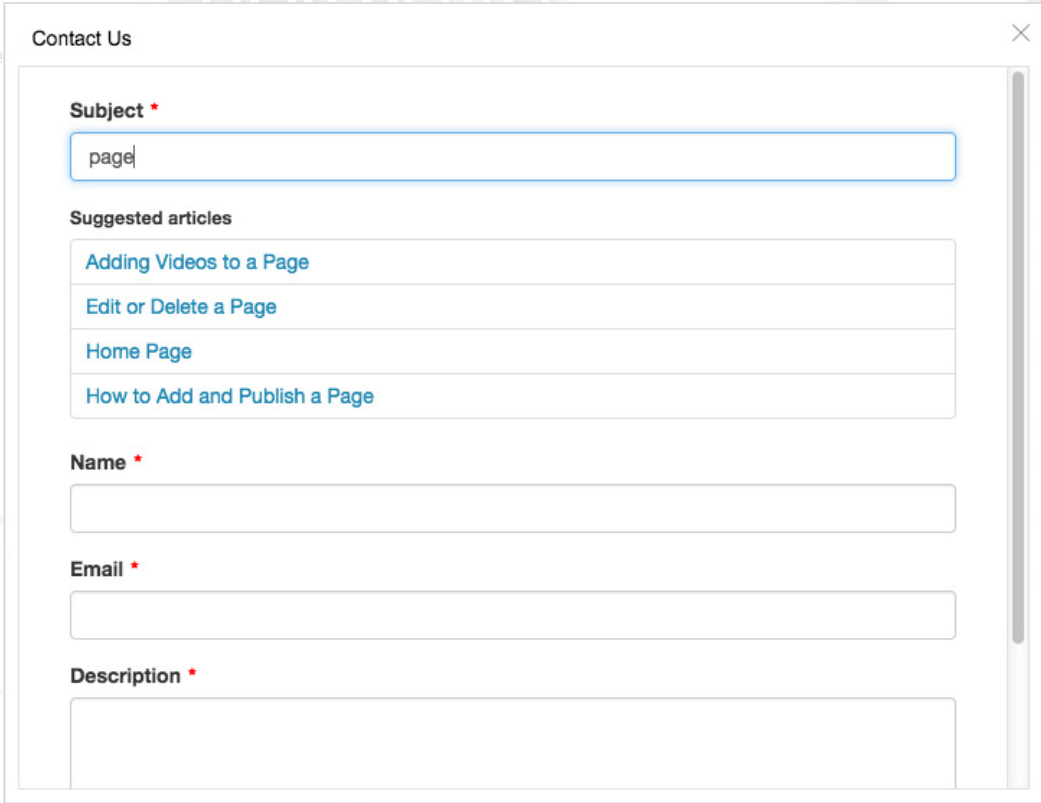
[Documentation Tab](#)

[Zendesk Support Widget](#)

[Zendesk Single Sign-On](#)

# Zendesk Support Widget

The Support Widget allows you to collect feedback or support requests directly from your ProProfs site. This saves your customers from having to locate your support email or contact details. With a single click, your customers can fill out your support form and the data will automatically be sent to your Zendesk. You can even add this form to your external websites or apps.



The screenshot shows a 'Contact Us' form widget overlaid on a blurred background of a ProProfs website. The form has a title bar with a close button (X). It contains the following fields and sections:

- Subject \***: A text input field with the word 'page' entered.
- Suggested articles**: A list of four links: 'Adding Videos to a Page', 'Edit or Delete a Page', 'Home Page', and 'How to Add and Publish a Page'.
- Name \***: A text input field.
- Email \***: A text input field.
- Description \***: A larger text input field.

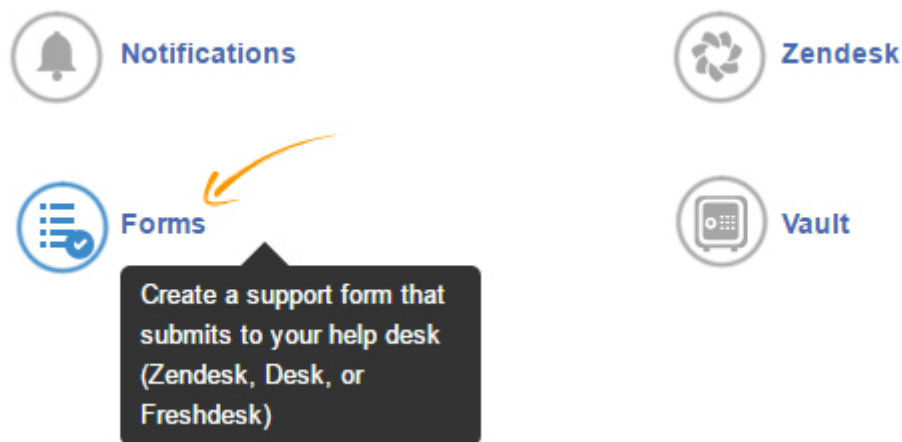
At the bottom of the form, there is a link that says 'Check us out on Twitter'. To the right of the form, a vertical green button labeled 'Support' is visible. The Zendesk logo is in the bottom right corner of the widget area.

The following topics are covered on this page:

- [Activate the integration](#)
- [Create the Support Form](#)
- [Customize the Support Form](#)
  - [Form Settings](#)
  - [Tab Settings](#)
  - [Embed Options](#)

## Activate the integration

**Step 1.** Go to ProProfs Knowledgebase settings and click on Forms.



**Step 2.** Add your credentials and click on next.

1. **Username** - Enter your Zendesk username such as james@abc.com. This can be any valid Zendesk username.
2. **Subdomain** - Enter your Zendesk account URL such as company.zendesk.com.

### Select Help Desk Vendor Step 1 of 2



#### Enter in credentials

ProProfs will use an API to submit the form to the selected vendor. [Follow this guide](#) for finding the required credentials

\*Username

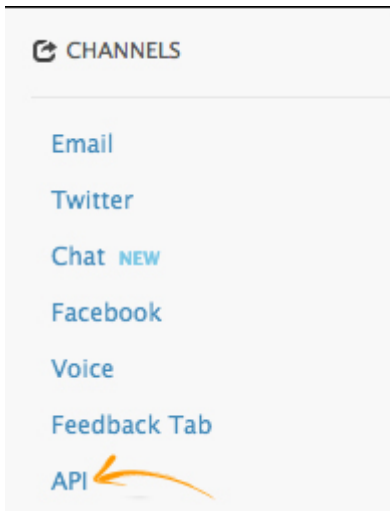
\*Helpdesk URL   
URL for your help desk account.

\*API Key

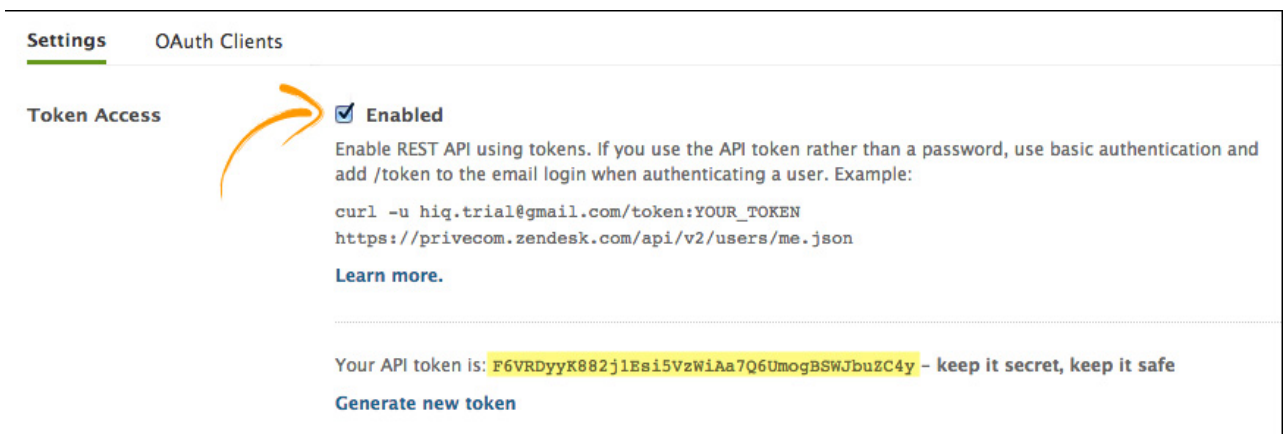
- **API Key** - Enter your API key. This can be found by:
  - After you log in to Zendesk click on the **Settings** icon on the bottom left side.



- In the left navigation bar, under **Channels** group, click on **API**.



- Enable **Token Access** checkbox. In token access section you will find your API token key. Copy the API token.



## Create the Support Form

After you enter in your credentials and click next, ProProfs will connect to Zendesk and read all the ticket fields you are using. Custom ticket fields are typically used to gather more information about the support issue, product, or service. For example, you may want your customers to also select the model name and number of your product. Learn how to add ticket fields in [Zendesk](#).

**Select Form Field** Step 2 of 2 << back

Show	Required	Label	Original Label	Type	Layout
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Subject"/>	Subject	Text	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Name"/>	Name	Text	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Email"/>	Email	Email	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Description"/>	Description	Multi-Line	1 column ▾
<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Type"/>	Type	Drop Down	1 column ▾
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Priority"/>	Priority	Drop Down	1 column ▾
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="Browser"/>	Browser	Drop Down	1 column ▾
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Company"/>	Company	Text	1 column ▾

Cancel

Next

After ProProfs reads the ticket fields, you will set which fields you want to display, if the field is required, and the order of the fields. Note: ProProfs will read all fields including hidden fields. It is up to you to select which fields you want to collect.

- **Show Field** - Place a checkmark for each field you want to display on the form. Uncheck, and the field will be hidden.
- **Make Field Required** - Place a checkmark for each field you want to be required to fill out.
- **Label** - The original label is shown as provided by Zendesk. You can leave as is or rename (this will not affect Zendesk).
- **Type** - The field type as provided by Zendesk (text, email, multi-line, drop down, etc.,)
- **Layout** - This refers to the form layout. 1 column layout means that the form field will span the entire form width. 2 column layout means the form will allow 2 fields side-by-side to each other.

Description \*

Type

Priority

2 Columns

Browser \*

Company

Attach file

Submit

1 Column

- **Field Order** - You can change the order of the fields by dragging and dropping to the desired order. For example, lets say you want 'Type' to appear before 'Name'. You can simply drag it above.

Show	Required	Label	Original Label
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subject	Subject
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Name	Name
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email	Email
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Type	Type
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Description	Description

Once you have finished with the fields, click **Next**.

## Customize the Support Form

## Form Settings

After you have successfully setup the fields you can now customize the Support Form.

### Form Settings

**\* Form Title**

**\* Thank you message**

**Settings**

- ☒ Allow Attachment
- ☒ Enable search suggestions (ticket deflection)  
As you type in a subject, page suggestions will be shown
- ☐ Show placeholder text in form fields

**Lightbox** Height  ☒ Background overlay

- **Form Title** - Enter a form title.
- **Thank you message** - The thank you message will be shown after the form has successfully been submitted.
- **Allow attachment** - Select this option if you want to allow users to attach files to the ticket.
- **Enable search suggestions (ticket deflection)** - As the user types in a subject for the ticket, pages from your ProProfs site are instantly suggested. The goal is to help the user find what they are looking for so they don't have to submit a ticket. This is often referred to as *ticket deflection*, as it helps customers find answers without ever having to submit a ticket.

### Subject \*

### Suggested articles

[Choose an Email Template](#)

[Creating an Email Campaign - Step 1](#)

[Email Checklist and Scheduled Delivery](#)

[Email Content](#)



At this time only topics from your ProProfs site are suggested. If you are interested in having topics from Zendesk also appear in the suggestions, please [contact us](#).

- **Show placeholder text in form fields** - Select this option if you want placeholder text to be in the form fields.



Subject \*

Subject

- **Lightbox Height** - Enter in the height of the lightbox window. The default is 500 pixels.
- **Background Overlay** - Select if you want the lightbox to have a transparent (80%) background overlay color.

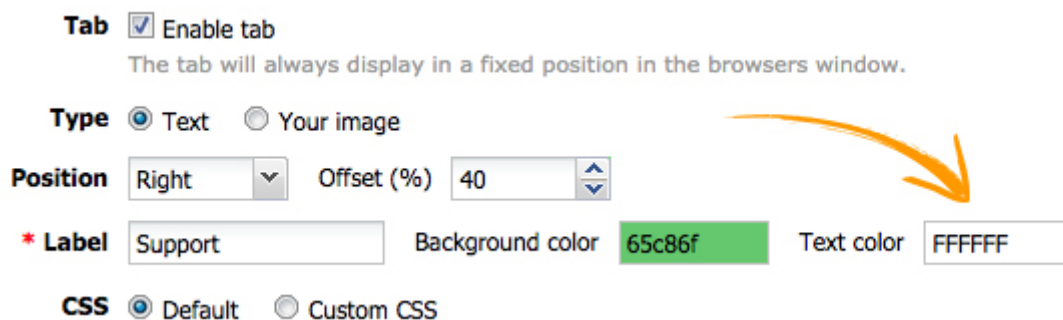
You can also test the form at any time by clicking the **Test** button.

## Tab Settings

The tab is what your users can click on to display the support form (the tab can also be hidden). It is a small tab that can appear on the top, bottom, left, or right of the web browser's window.



The tab's text and color can be customized and branded.



**Tab** ☒ Enable tab  
The tab will always display in a fixed position in the browser's window.

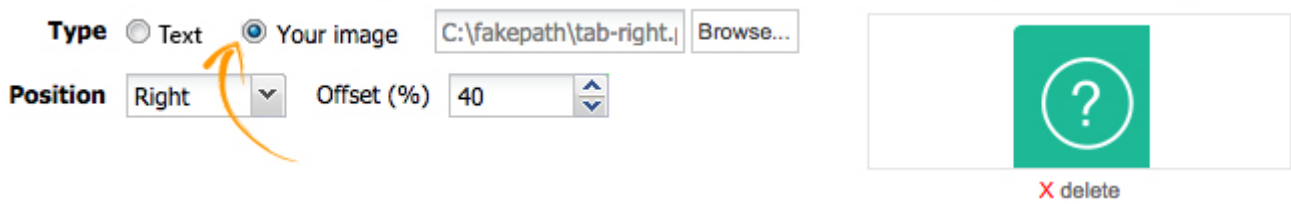
**Type** ☒ Text ☐ Your image

**Position** Right  Offset (%) 40

\* **Label** Support Background color 65c86f Text color FFFFFFFF

**CSS** ☒ Default ☐ Custom CSS

- **Enable Tab** - Unselect if you do not want to use the tab. You can still open the support form via hyperlink as described [below](#).
- **Type** - You can use the default 'text' tab or upload your own image.



- **Position** - Choose the position of the tab (top, bottom, left, or right). Changing will instantly update so you can preview it. You can also change the offset to move the tab to the desired location.
- **Label** - Enter in the text of the label. The default is 'Support' but some other good options are: Feedback, Help, Questions, Comments, Email, Ask Us.
- **Background and Text color.** Use the color picker to select the color of the tab. You can also change the color of the text.
- **CSS** - For more advanced customizations, you can enter in your own custom CSS for the tab.

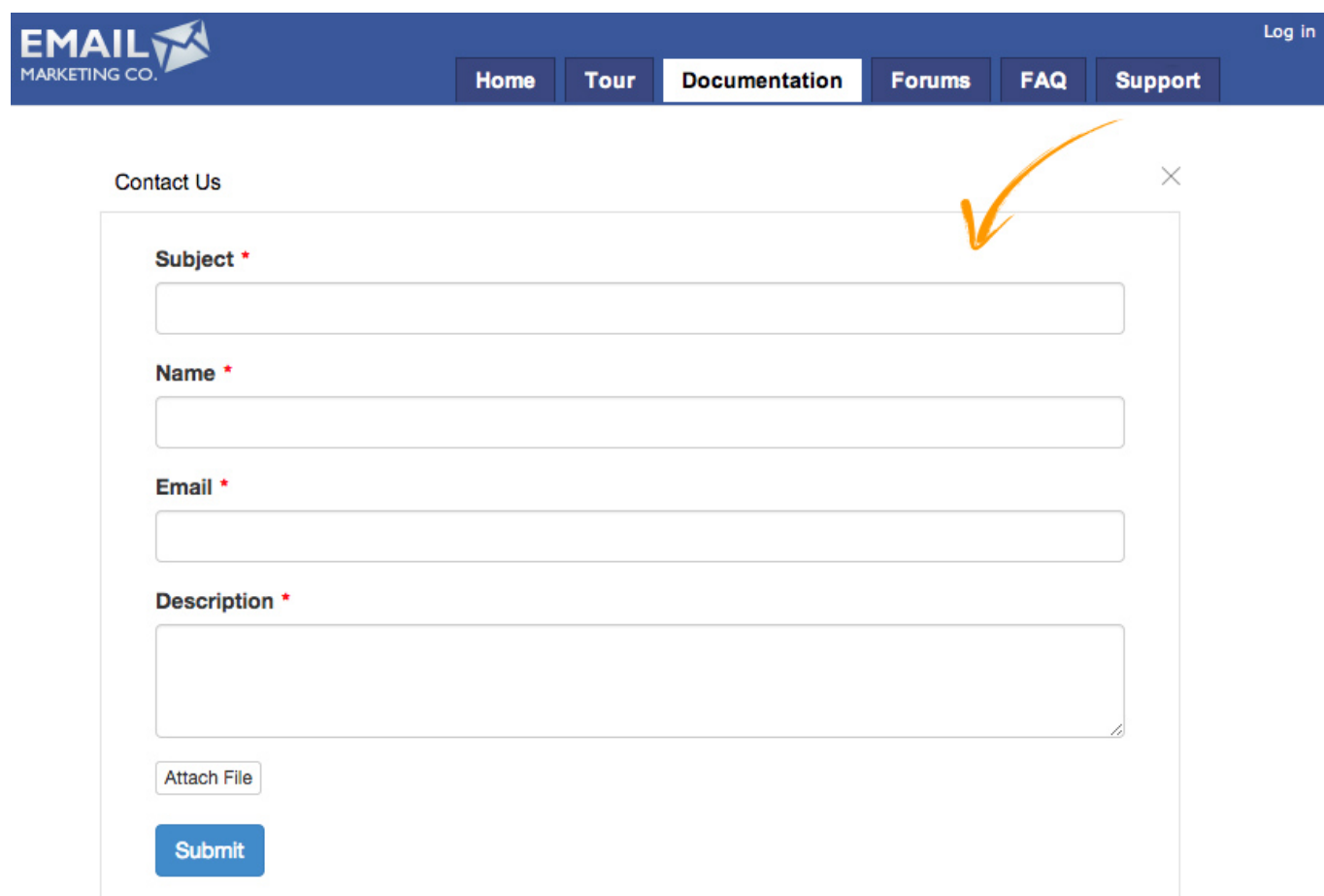
Every customization you make will reflect in real-time so you can have a live preview of all your changes as you customize.

## Embed Options

In addition to the tab, we provide a few other options in displaying the Support Form.

<b>Lighbox Hyperlink</b>	<pre>&lt;a href="#" rel="supportlightbox"&gt;Support&lt;/a&gt;</pre> <p>Add hyperlink to any HelpIQ page to open a lightbox</p>
<b>Pop-up Hyperlink</b>	<pre>&lt;a href="javascript:void(window.open('http://stage.youremailco.com/ticket/load_form','blank','scrollbars=yes,toolbar=no,width=700,height=800'));" &gt;Support&lt;/a&gt;</pre> <p>Add hyperlink to any HelpIQ page or external site to open a pop-up</p>
<b>Embed Code</b>	<pre>&lt;iframe allowtransparency="true" frameborder="0" scrolling="no" src="http://stage.youremailco.com/ticket/load_form" style="width:100%;height:935px;border:none;"&gt;&lt;/iframe &gt;</pre> <p>Add the form on any HelpIQ page or external site (does not use Lightbox)</p>

- **Lightbox** - This option allows you to add hyperlink anywhere inside of ProProfs to open the support form in a lightbox. You could add the link in your navigation or anywhere on a page, that when clicked, will open the lightbox. To use, simply copy the provided hyperlink code `<a href="#" rel="supportlightbox">Support</a>` and paste it onto any page or in your header. You can see a link we added to the [custom header](#) called 'Support' below.



EMAIL  
MARKETING CO.

Home Tour Documentation Forums FAQ Support

Log in

Contact Us

Subject \*

Name \*

Email \*

Description \*

Attach File

Submit

- **Popup** - This option works best for external websites and web applications. Just copy the provide code and paste it in your website. Clicking the link will open the support form in a pop-up window.
- **Embed Code** - If you want to embed just the form (no lightbox or pop-up window) then you can use this code. Just copy the provided code and paste it in the source code of any page of your external website.

#### Related Articles:

[Search Widget](#)

[Post Ticket Widget](#)

[Documentation Tab](#)

## Zendesk Single Sign-On

You can manage Zendesk and ProProfs with a single login. To enable this you need to complete the following steps:

1. Login to ZenDesk and click on Settings and then on Extensions
2. Click on Add Widget and select "Global JavaScript"
3. Select "People who have signed in and are agents" and add the code mentioned below:

```
jQuery( document ).ready(function() {  
  
var hiqimg=document.createElement("img");  
hiqimg.setAttribute('src',  
'https://yoursitenam.helpdocsonline.com/remote_auth/your_sso_api_key');  
hiqimg.setAttribute('height', '1px');  
hiqimg.setAttribute('width', '1px');  
document.body.appendChild(hiqimg);  
  
});
```

### Related Articles:

[Private Sites](#)

[Single Sign-On](#)

[JWT Single Sign-On](#)

# API

# How to Create Delete & Update a User via API

You can implement an API to create, delete, and update a user to the Knowledge Base.

**In this article, you'll learn:**

1. [Create user API](#)
2. [Delete user API](#)
3. [Update user API](#)

## 1. How to Create a User via API

### Endpoint URL:

The endpoint URL given below is used to call the rest API. **POST** will be used as the request method. **JSON** will be your request format.

**POST** <https://www.helpdocsonline.com/proprofsapi/user/v1>

### Request Parameters

Name	Required	Type	Description
api_key	Yes	String	Your private API key for the FAQ. The API key is available at: Settings > In-App Help > API key
action	Yes	String	The action of the API "create."
users	Yes	String/Array	<p>You can create one user at a time. Sample like email, name, role, access_sites, group</p> <p><b>1. role:</b> It can be any value from 'Admin', 'Editor', 'Contributor', 'Viewer'.</p> <p><b>2. access_sites:</b> Allowed values are: 0 or 1. Pass 1 if you want to give access to all the sites and pass 0 if you don't want to provide access to any of the sites (it can be used when you don't want to give access to all the sites but want to give access according to any group)</p> <p><b>3. group:</b> Pass the group names here separated by a comma (if more than one)</p>

### Sample Code | JSON

```
Accept: application/json
Content-Type: application/json
{
```

```
"api_key": "<your API key>",
"action": "create",
"user":
{
    "email": "sample@mycompany.com",
    "name": "Sample",
    "role": "Contributor",
    "access_sites": 0,
    "group": "groupName1,groupName2"
}
}
```

### Sample Code | PHP Script

```
$data = array();
$data['api_key'] = '<your API key>';
$data['action'] = 'create';
$users=
array('email'=>'sample@mycompany.com','name'=>'Sample','role'=>'Contributor','a
ccess_sites'=>0,'group'=>'groupName');
$data['users'] = array($user1);
echo json_encode($data);
```

### Response Format

JSON

### Example Response [Success]

```
Content-Type: application/json
[
{
    "status": "SUCCESS",
    "msg": "User added successfully"
}
]
```

Name	Required
status	Success
msg	User added successfully

## 2. How to Delete a User via API

### Endpoint URL:

The endpoint URL given below is used to call the rest API. **POST** will be used as the request method. **JSON** will be your request format.

**POST** <https://www.helpdocsonline.com/proprofsapi/user/v1>

### Request Parameters

Name	Required	Type	Description
------	----------	------	-------------

api_key	Yes	String	Your private API key for the FAQ. The API key is available in the manage account section of the super admin.
action	Yes	String	The action of the API "delete."
users	Yes	String	Enter the email id of the user which you want to delete.

**Note:** We can't delete the master user from this API.

### Sample Code | JSON

```
Accept: application/json
Content-Type: application/json
{
  "api_key": "<your API key>",
  "action": "delete",
  "user":
  {
    "email": "sample@mycompany.com"
  }
}
```

### Sample Code | PHP Script

```
$data = array();
$data['api_key'] = '<your API key>';
$data['action'] = 'delete';
$user= array('email'=>'sample@mycompany.com');
$data['users'] = array($user);
echo json_encode($data);
```

### Response Format

JSON

#### Example Response [Success]

```
Content-Type: application/json
[
  {
    "status": "SUCCESS",
    "msg": "User deleted successfully"
  }
]
```

Name	Required
status	Success
msg	User deleted successfully

## 3. How to Update a User via API

### Endpoint URL:

The endpoint URL given below is used to call the rest API. **POST** will be used as the request



method. **JSON** will be your request format.

**POST** <https://www.helpdocsonline.com/proprofsapi/user/v1>

Name	Required	Type	Description	Default
api_key	Yes	String	Your private API key for the FAQ.  The API key is available at: <b>Login as Master user &gt; Edit account</b> (Right top hamburger menu)	
action	Yes	String	The action of the API. "update."	
first_name	Yes	String	User's first name	
last_name	Yes	String	User's Last name	
password	No	String	User's Password	Minimum length = 8 characters with alphanumeric
email	Yes	String	Email ID of the User	
status	Yes	Numeric	0 = Inactive 1= Active	
access_sites	Yes	String	Comma separate site ids	
access_groups	No	String	Comma separate group names	

### Example Request

**POST** <https://www.helpdocsonline.com/proprofsapi/article/v1>

```
Accept: application/json
{
  "Action": "update",
  "Api_key": "ddsdsdsf",
  "first_name": "Proprofs",
  "last_name": "Help",
  "Password": "12345678",
  "email": "webmaster@dev.com",
  "Status": 1,
  "Access_sites": "14033,40625",
  "access_groups": "Test,Yog"
}
```

### Response Format

JSON

### Example Response

```
Content-Type: application/json
[
  {
    "status": "SUCCESS",
    "msg": "User updated successfully"
  }
]
```

]

*That is all about creating, deleting, and updating users via API.*

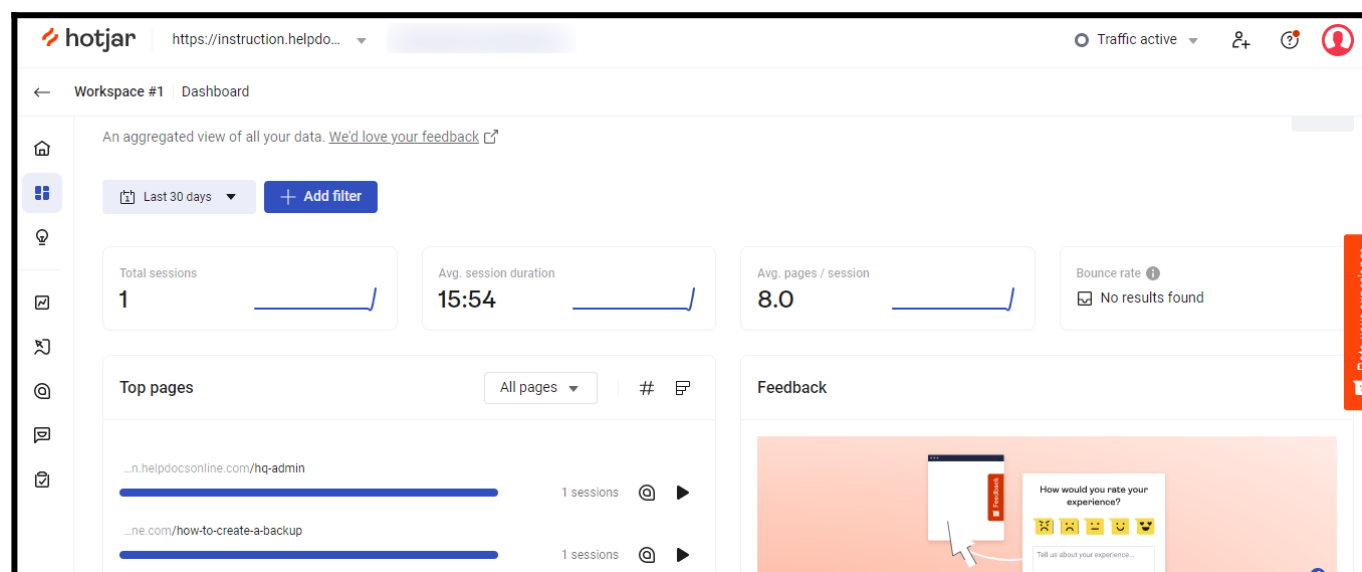
### Related Articles:

- [Integrate Salesforce Desk with Knowledge Base](#)
- [Integrate LiveChat with Knowledge Base](#)
- [Integrate Olark with Knowledge Base](#)

# How to Integrate Hotjar with Proprofs Knowledge Base

**ProProfs** and **Hotjar** integration helps to capture detailed user insights from your Knowledge Base through heat maps, surveys, and session recordings into user activities through user activities. This help article shows the detailed steps for installing and integrating Hotjar on your ProProfs Knowledge base.

Here is how the Hotjar integration with ProProfs Knowledge Base tracks the user activity of your help site:



## Benefits of Integrating ProProfs Knowledge Base With HotJar:

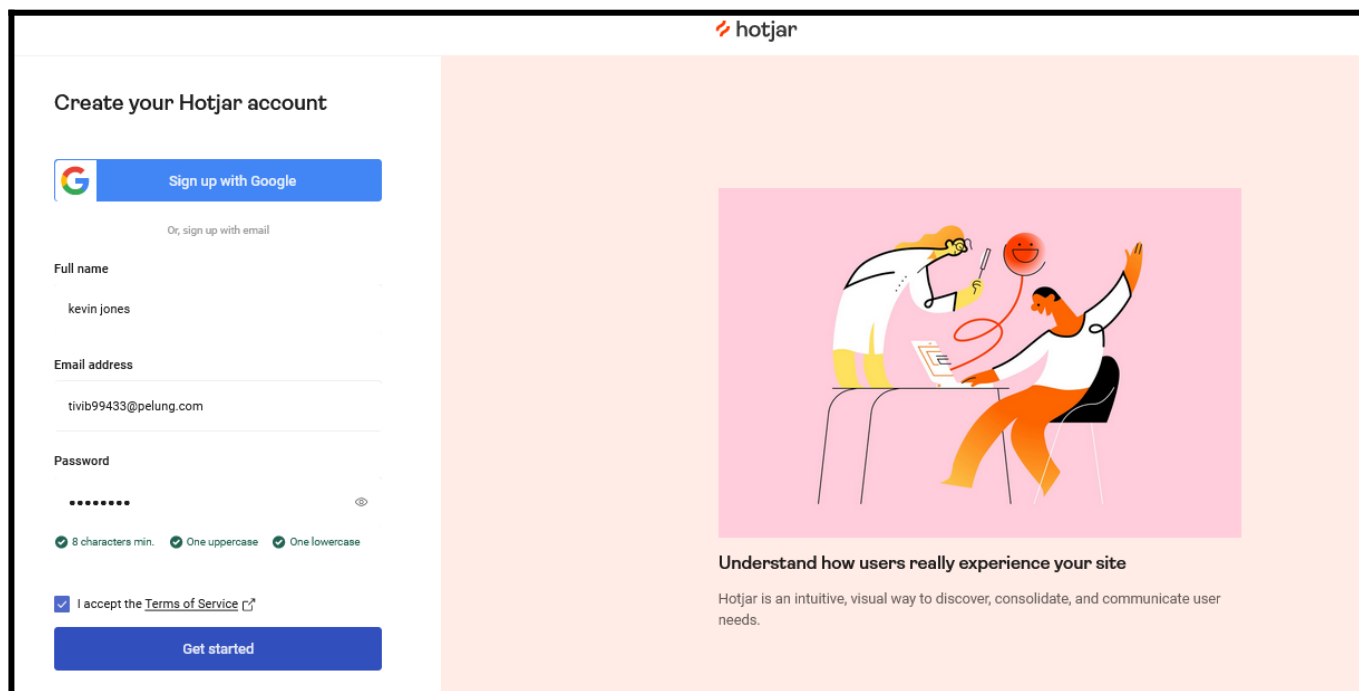
- Visualize user behavior through heatmaps
- Capture feedback to improve user experience
- Record user activities & track their journey from entry to exit

## How to Integrate Hotjar with Proprofs Knowledge Base

For a better understanding of the integration of Hotjar with ProProfs Knowledge Base, we have divided the article into 3 sections.

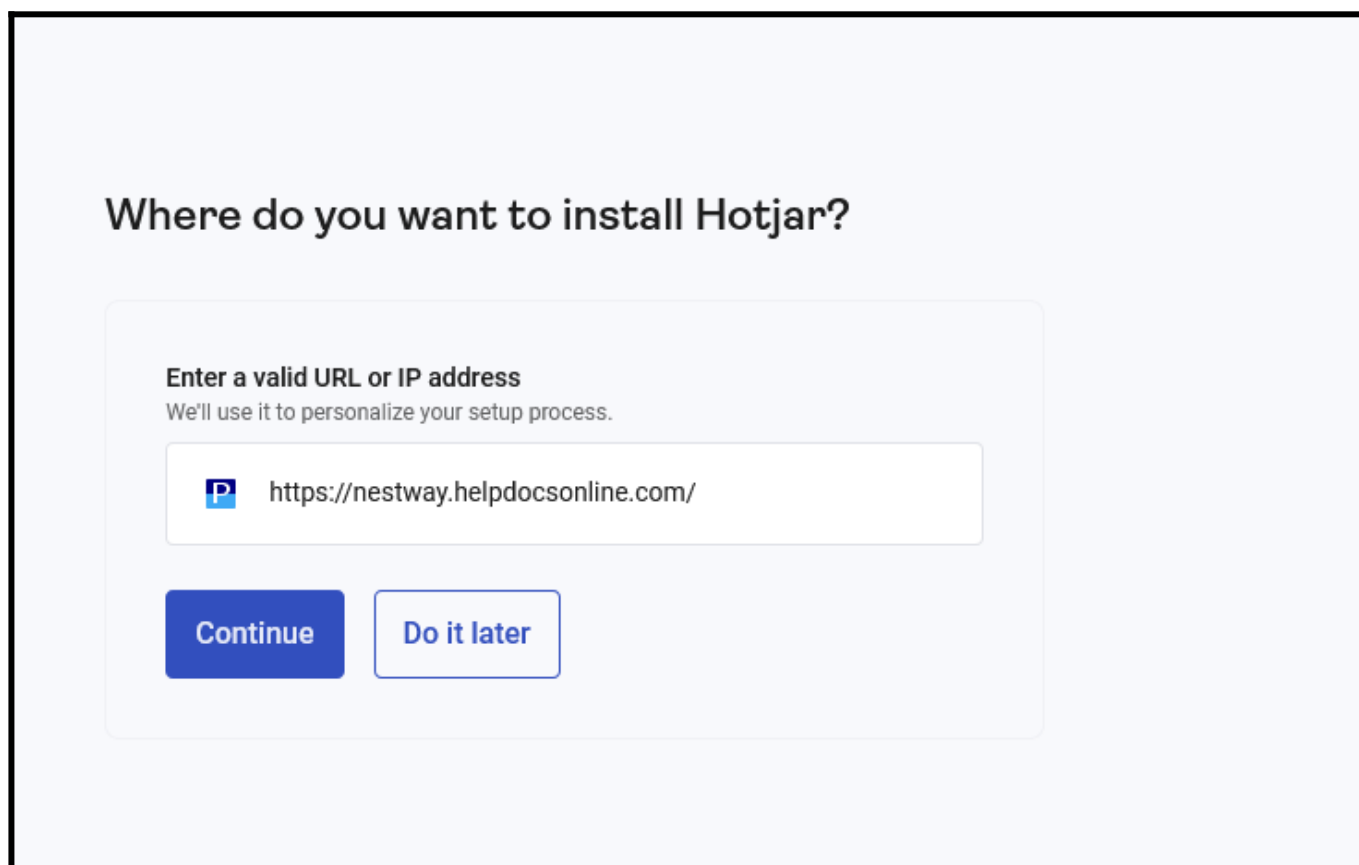
### Part A: Setting up Your Account in Hotjar

**Step 1:** [Sign up](#) for your account in Hotjar and add your organization details.



The image shows the Hotjar account creation interface. On the left, there is a form titled "Create your Hotjar account". It includes a "Sign up with Google" button with the Google logo, a link to "Or, sign up with email", and fields for "Full name" (filled with "kevin jones"), "Email address" (filled with "tivib99433@pelung.com"), and "Password" (masked with dots). Below the password field are three checkboxes: "8 characters min.", "One uppercase", and "One lowercase", all of which are checked. There is also a checkbox for "I accept the Terms of Service" which is checked. A "Get started" button is at the bottom of the form. On the right, there is a large pink illustration of two people, one standing and one sitting, interacting with a laptop. Below the illustration, the text reads: "Understand how users really experience your site" and "Hotjar is an intuitive, visual way to discover, consolidate, and communicate user needs."


**Step 2:** Add your Knowledge Base URL.




The image shows the Hotjar installation URL screen. It has a light blue background. At the top, the text "Where do you want to install Hotjar?" is displayed. Below this, there is a white box containing the text "Enter a valid URL or IP address" and "We'll use it to personalize your setup process." Below this text is a text input field with a blue "P" icon on the left and the URL "https://nestway.helpdocsonline.com/" entered. At the bottom of the white box, there are two buttons: a blue "Continue" button and a white "Do it later" button with a blue border.

Hotjar will verify your URL, and after successful verification, you will get the option(s) to install Hotjar on your help site.


**Step 3:** Click "Get tracking Code."




## How do you want to install Hotjar?

 **Add the tracking code manually**  
Paste your tracking code in the <head> tag of every page where you want to track user behavior.  

Get tracking code



 **Install with developer help**  
Share your tracking code and installation instructions with a developer on your team.  

Share by email

**Step 4:** You will see the **Site ID**. Copy it for further reference.

[< Installation methods](#)

## Install code manually

Paste the Hotjar code into the `<head>` of every page you wish to track users and collect feedback. And then verify your installation.

```
1 <!-- Hotjar Tracking Code for https://mist.helpdocsonline.com/ -->
2 <script>
3   (function(h,o,t,j,a,r){
4     h.hj=h.hj||function(){(h.hj.q=h.hj.q||[]).push(arguments)};
5     h._hjSettings={hjid:3160022,hjsv:6};
6     a=o.getElementsByTagName('head')[0];
7     r=o.createElement('script');r.async=1;
8     r.src=t+h._hjSettings.hjid+j+h._hjSettings.hjsv;
9     a.appendChild(r);
10    })(window,document,'https://static.hotjar.com/c/hotjar-','.js?sv=');
11 </script>
```

Copy

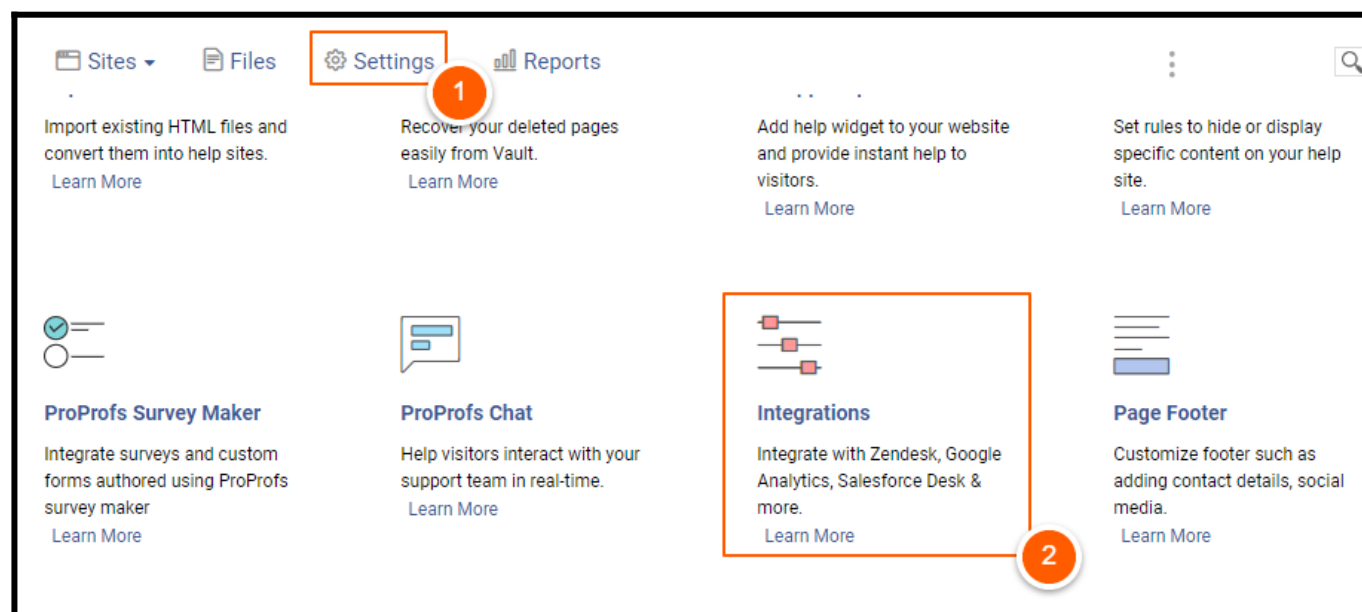
Verify installation

Site ID: 3160022

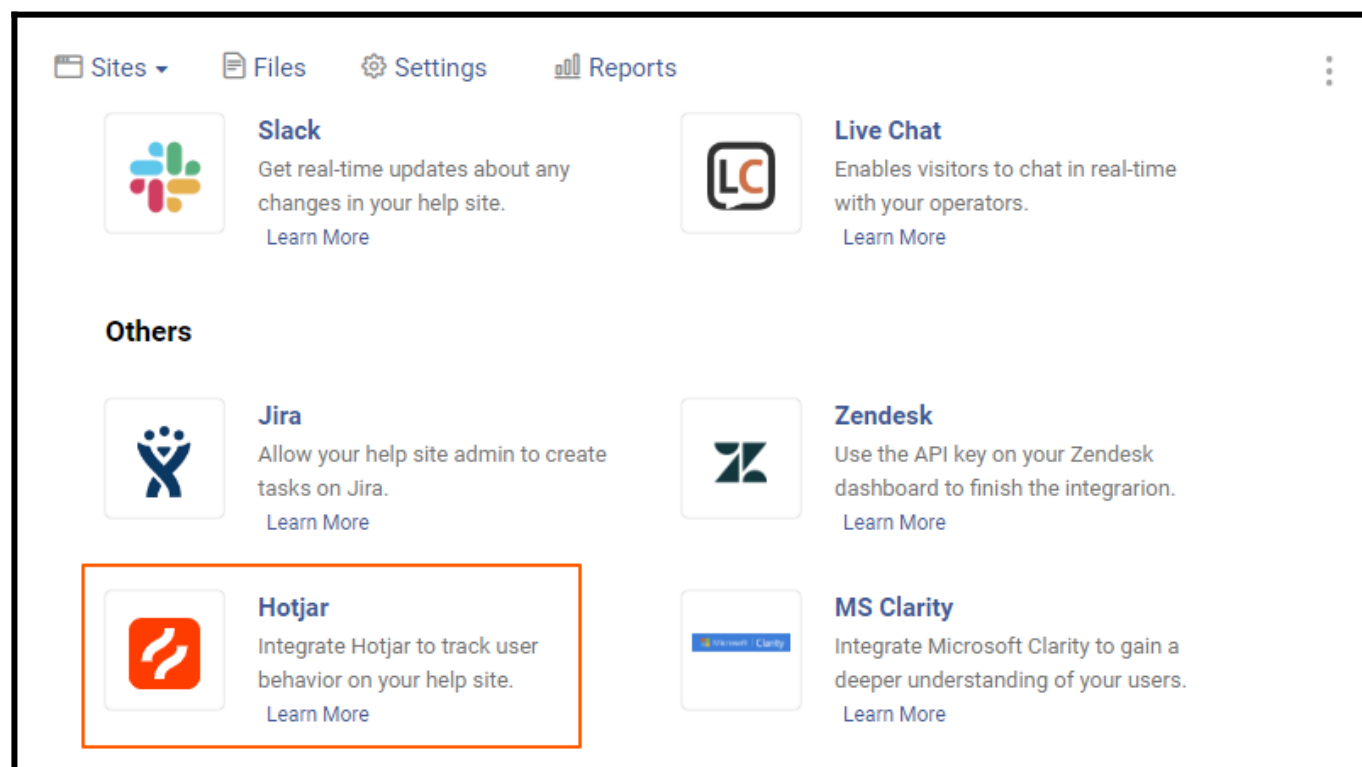
## Part B: Integrating Hotjar With ProProfs Knowledge Base

**Step 1:** Open your ProProfs Knowledge base account in a separate tab.

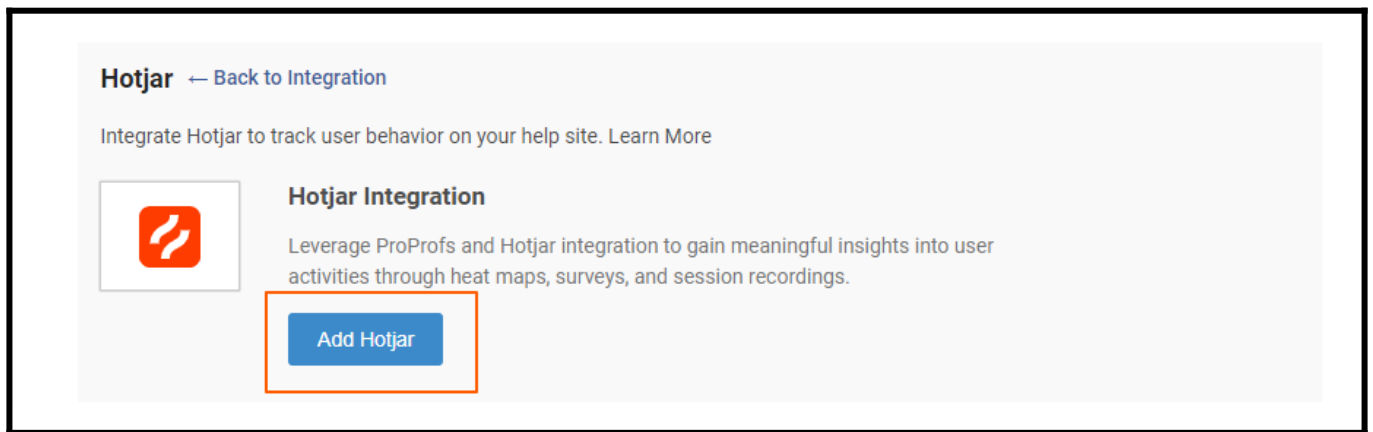
**Step 2:** Navigate to **Settings > Integrations**.



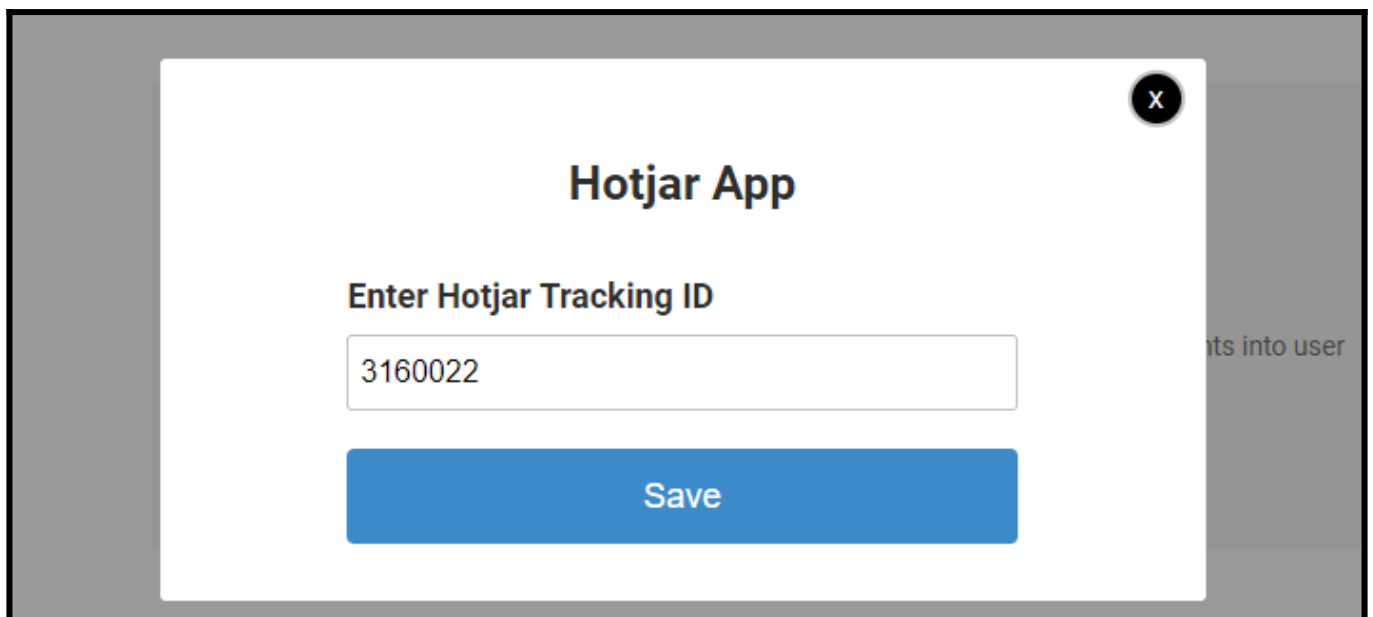
**Step 3:** In the Integrations, navigate to **Others > Hotjar**.



**Step 4:** Click **Add Hotjar**.



**Step 5:** Paste the **Site ID( Tracking ID)** and click **Save**.



## Part C: Verify the Installation

**Step 1:** Switch to the Hotjar tab on your browser and click "**Verify Installation.**"

[< Installation methods](#)

## Install code manually

Paste the Hotjar code into the `<head>` of every page you wish to track users and collect feedback. And then [verify](#) your installation.

```
1 <!-- Hotjar Tracking Code for https://mist.helpdocsonline.com/ -->
2 <script>
3   (function(h,o,t,j,a,r){
4     h.hj=h.hj||function(){(h.hj.q=h.hj.q||[]).push(arguments)};
5     h._hjSettings={hjid:3160022,hjsv:6};
6     a=o.getElementsByTagName('head')[0];
7     r=o.createElement('script');r.async=1;
8     r.src=t+h._hjSettings.hjid+j+h._hjSettings.hjsv;
9     a.appendChild(r);
10    })(window,document,'https://static.hotjar.com/c/hotjar-','.js?sv=');
11 </script>
```

[Copy](#)

[Verify installation](#)

Site ID: **3160022**

**Step 2:** Click the “Verify Installation” button.

hotjar Do it later

[< Installati](#)

Install

Paste

1

2

3

4

5

6

7

8

9

10

11

Tracking code Verify installation Site ID: 3160022

Verify your installation

Enter the URL of the site you installed Hotjar into in the field below.  
e.g. https://www.yoursite.com or https://localhost:8000

https://mist.helpdocsonline.com/

[Verify installation](#)

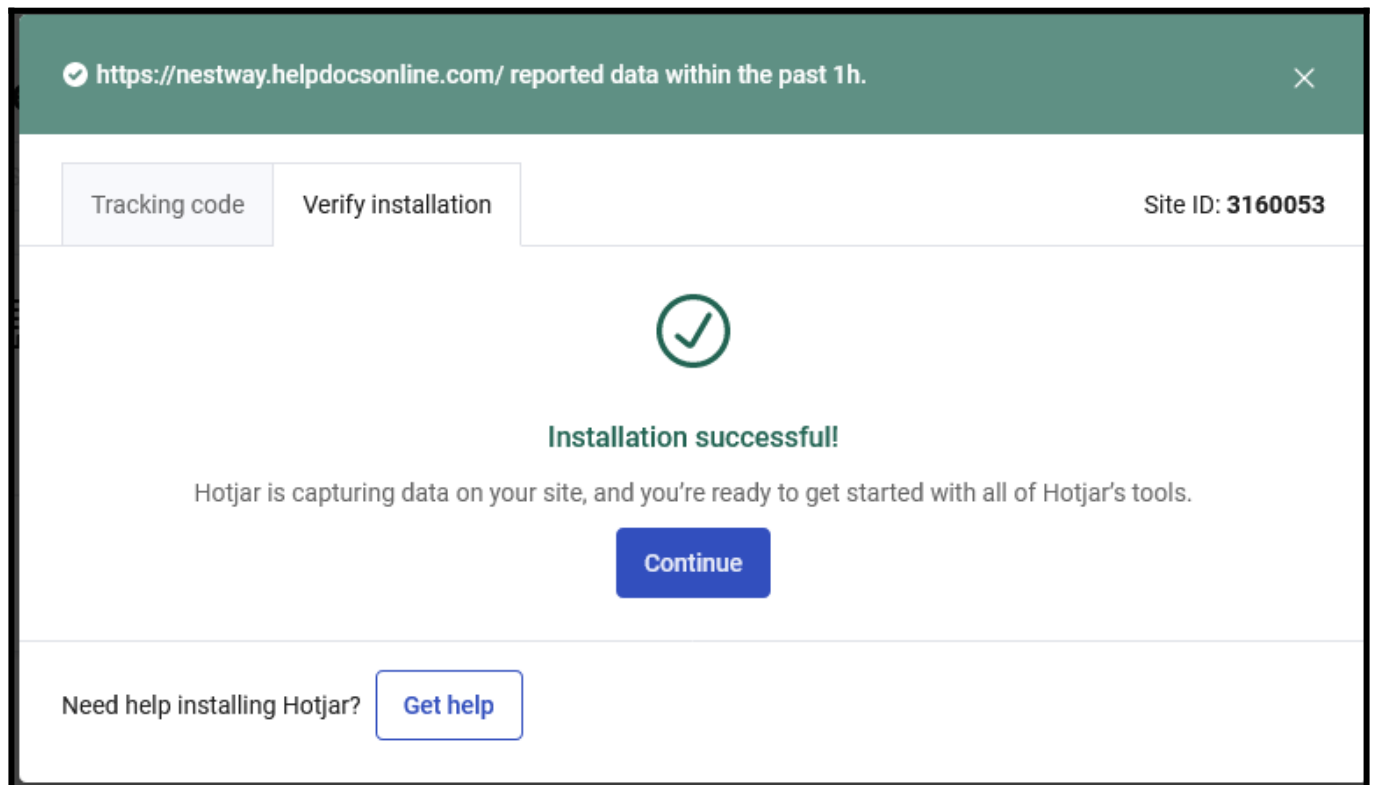
Need help installing Hotjar? [Get help](#)

Verify installation Site ID: 3160022

[Do it later](#)

Upon successful verification of installation, you will see a confirmation like this:





*That is all about integrating Hotjar with ProProfs Knowledge Base.*

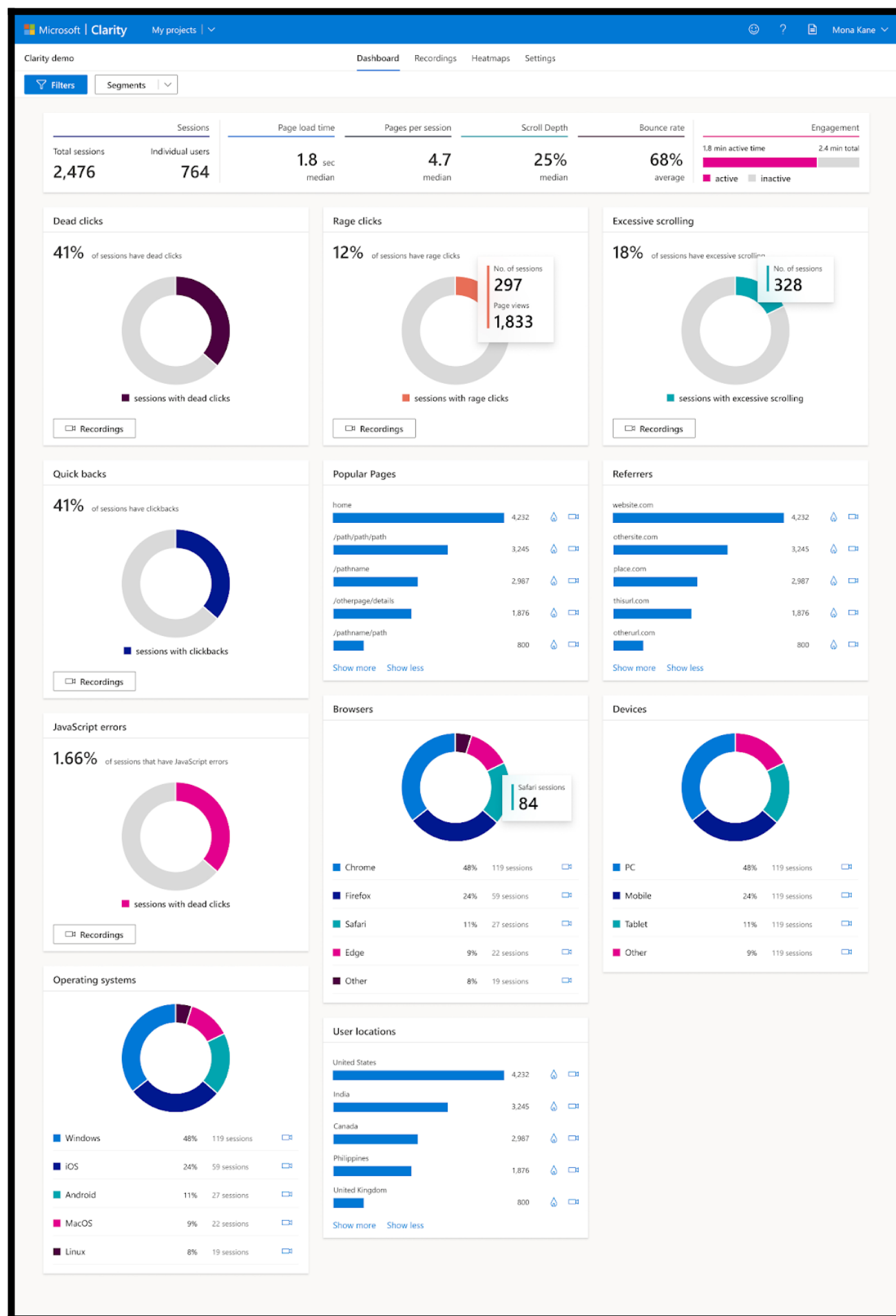
### Related Articles:

- [Zendesk Integration with ProProfs Knowledge Base](#)
- [JIRA integration With ProProfs Knowledge Base](#)
- [How to Integrate Slack With ProProfs Knowledge Base](#)

# How to Integrate Microsoft Clarity With ProProfs Knowledge Base

Clarity by Microsoft is an advanced user behavior analytics tool that provides insights into how users interact with your website. After integrating your KB help site with Clarity, you can leverage session replays and heatmaps to analyze users' interaction with your website.

[Overview of the MS Clarity Dashboard](#)



### Benefits of integrating MS Clarity with ProProfs Knowledge Base:

- Track user behavior & engagement on your help site
- Watch user activities through session recordings
- Use insights powered by machine learning to make data-driven decisions

## How to Integrate MS Clarity With ProProfs Knowledge Base

The MS Clarity integration with your Knowledge Base site is divided into **two** parts:

**Part 1:** Setting up a new project in MS Clarity and copying the tracking ID

**Part 2:** Pasting the tracking ID in the KB account

*Let's get started!*

### Part 1

**Step 1:** Sign up for [Clarity](#).

**Step 2:** You will see the projects page after completing the sign-up. Click **+New Project**.

**Step 3:** Enter the name and website details. Click **Add New Project** once done. You'll be redirected to **Getting Started**.


## Let's create your first Clarity project

What site do you want to analyze? Drop in a name and URL and you're on your way. You can have as many projects as you like—we don't like limits around here.

Name

Website URL


Add new project



**Step 4:** You will see different installation methods on your screen to install Clarity on your site. Here, we will proceed with manual installation. Click **Get Tracking Code**.

Microsoft | Clarity My Projects


KB Homepage Getting Started Dashboard Recordings Heatmaps Settings



### Install manually

Copy and paste tracking code into the <head> element of your site.


Get tracking code



### Install on a third-party platform

Works with Shopify, Squarespace, Wix, WordPress, and more

View all platforms



### Need help with installation?

Email the tracking code to a team member

Share code

I installed the code, why am I not seeing my data?

**Note:** If you have already added a project, you can select it and go to **Settings > Setup** to reach the installation page.

**Step 5:** You do not have to copy-paste the complete code to integrate MS Clarity with your Knowledge Base site. Copy the **tracking code**, as shown in the below screenshot.

Copy and paste the Clarity code into the <head> element of your site or app.

```
<script type="text/javascript">
  (function(c,l,a,r,i,t,y){
    (
    );
    t=l
    ;/tag/"+i;
    y=l.getElementsByTagName(r)[0];y.parentNode.insertBefore(t,y);
  })(window, document, "clarity", "script", "jpkz");
</script>
```

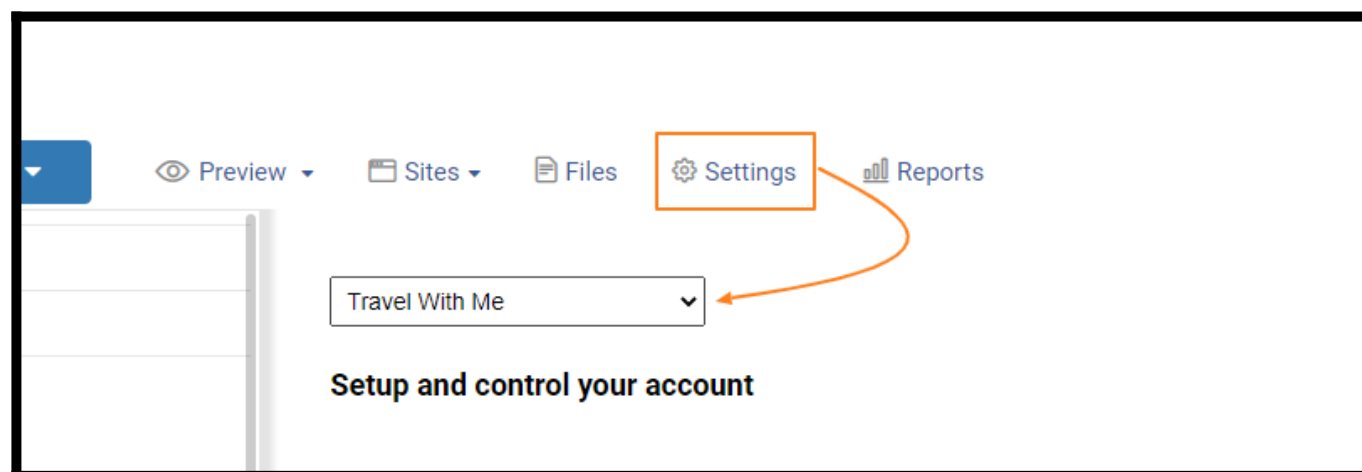
[Copy to clipboard](#)

Copy this tracking code instead of copying the entire script

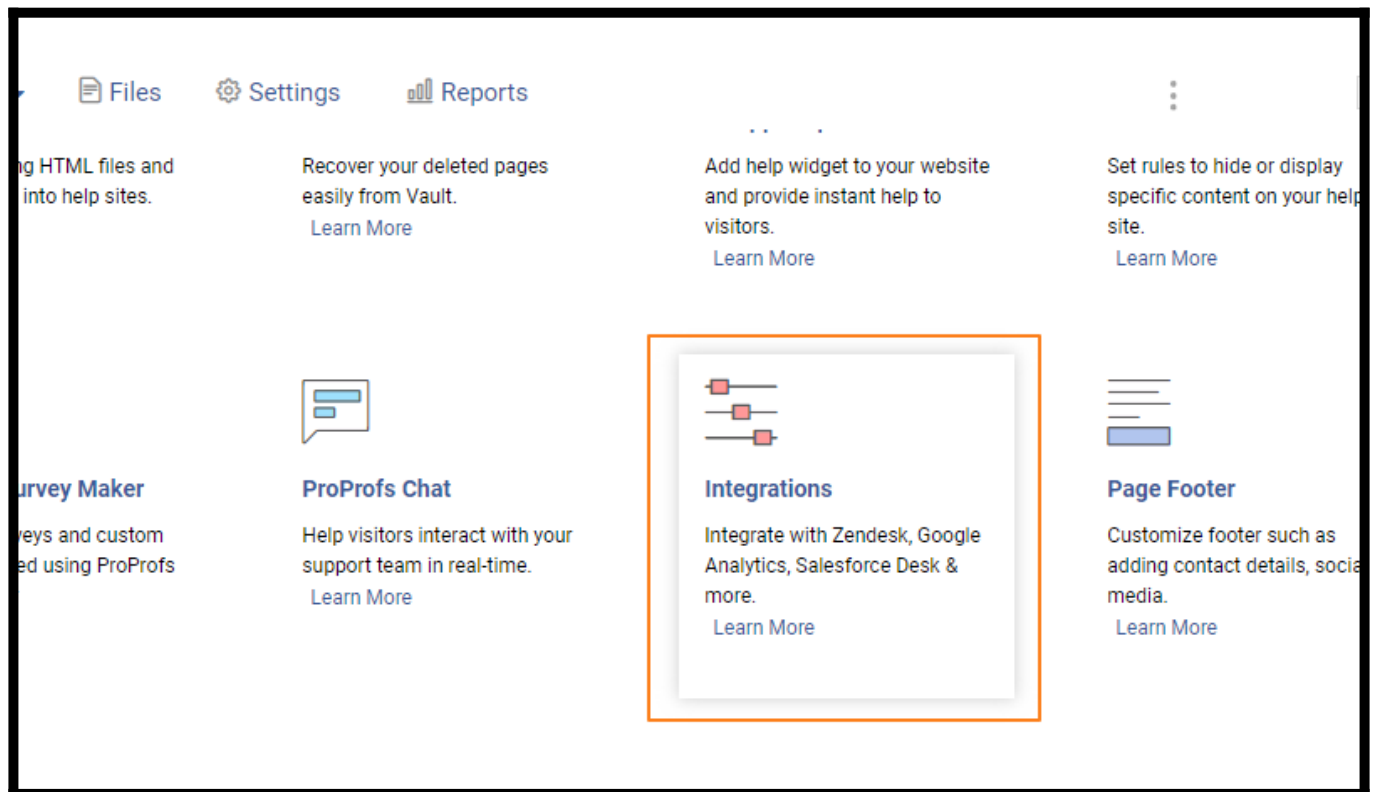
## Part 2

**Step 1:** Log in to your Knowledge Base account as an **administrator**.

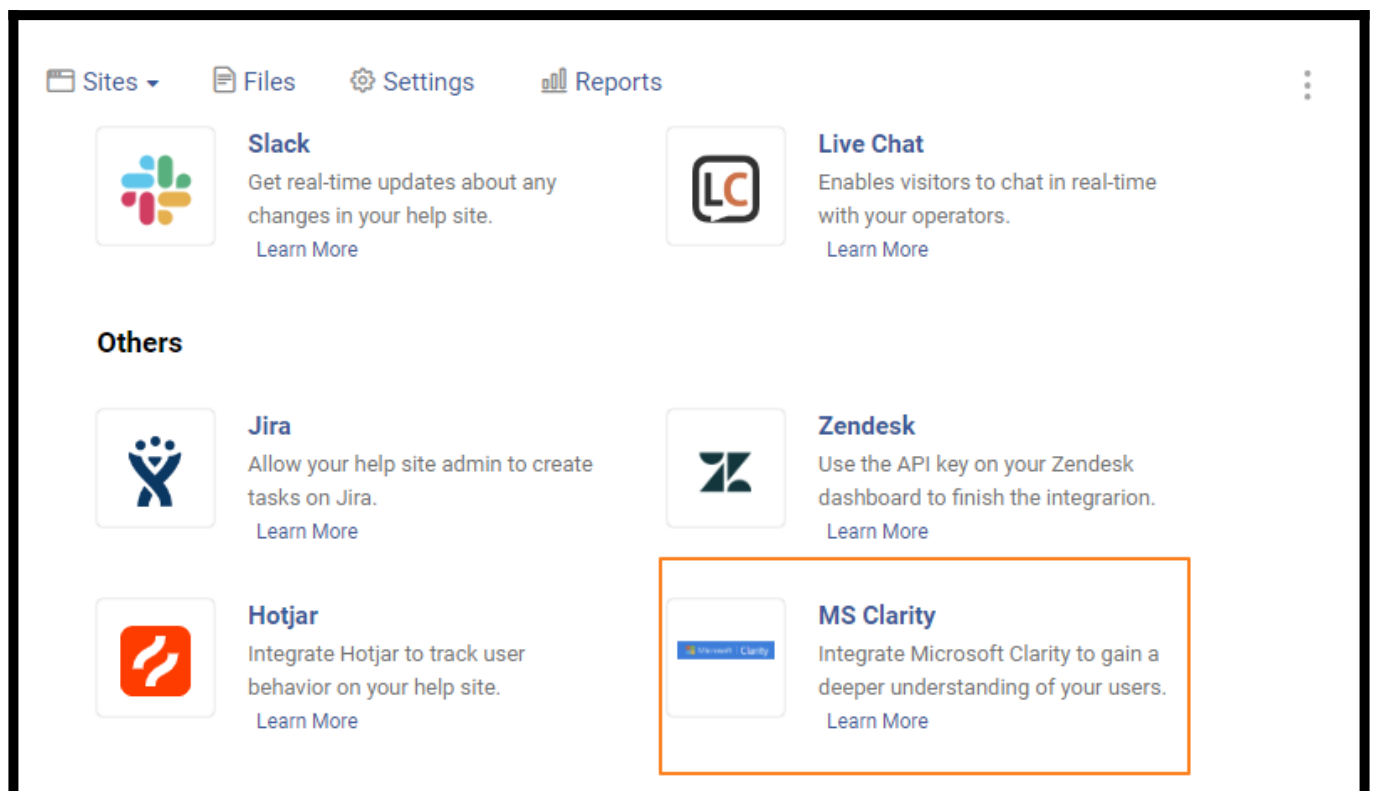
**Step 2:** Go to **Settings** > **Select the site** from the drop-down on which you want to install the tracking code.



**Step 3:** Scroll down to **Integrations** and click to open.

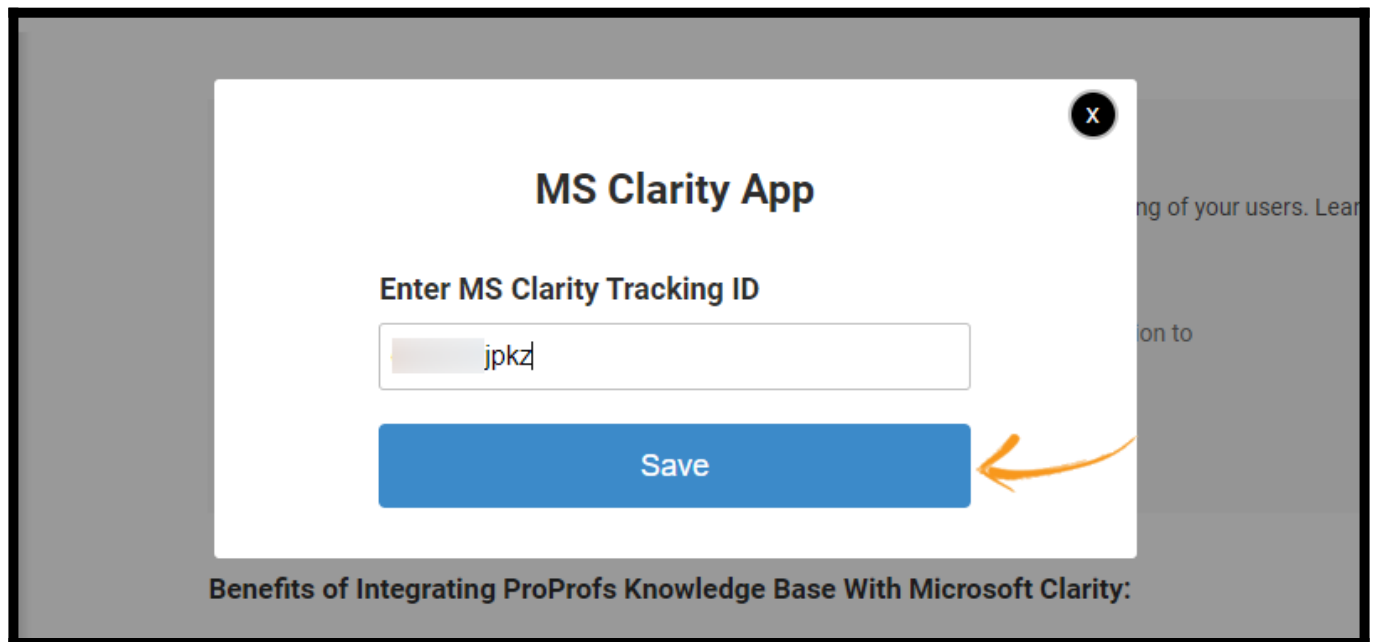


**Step 4:** Scroll down to the **Others** section and select **MS Clarity**.



**Step 5:** Click **Add MS Clarity**. A pop-up box opens.

**Step 6:** Paste the **tracking code** you copied in **Step 5** of Part 1. Click **Save** to finish the integration.



**Note:** It can take up to 2 hours before you start seeing your website data in Clarity.

That is all about integrating MS Clarity with your ProProfs Knowledge Base site.

### Related Articles:

- [How to Create Delete & Update a User via API](#)
- [How to Embed Lucidcharts in a Help Article](#)
- [How to Integrate Salesforce With ProProfs Knowledge Base](#)



# How to Embed Lucidcharts in a Help Article

Create flowcharts and diagrams with Lucidchart and embed them seamlessly in your ProProfs Knowledge Base to enhance the engagement quotient of your help articles.

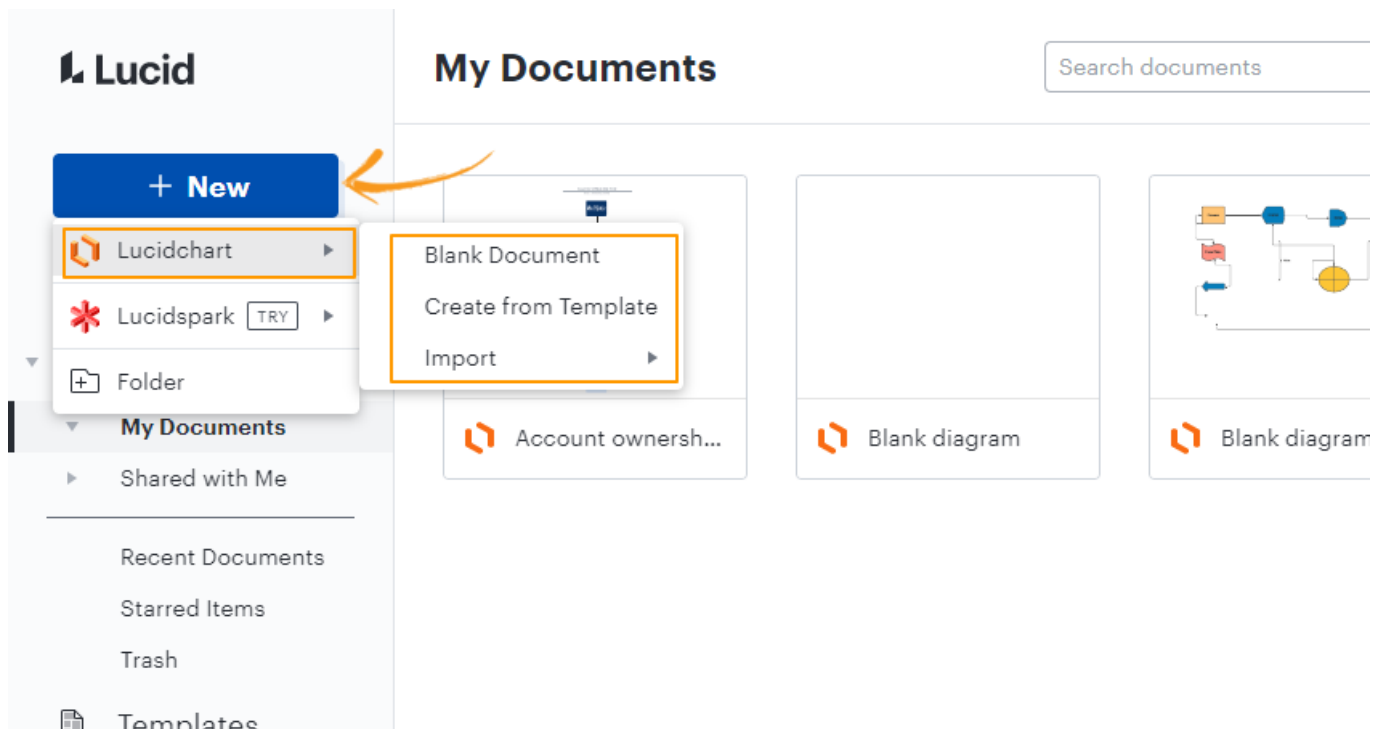
**Benefits of embedding Lucidcharts in a help article:**

1. **Showcase complex processes** with neat flow charts you create with Lucidcharts
2. Provide a **visual representation** of steps for better comprehension

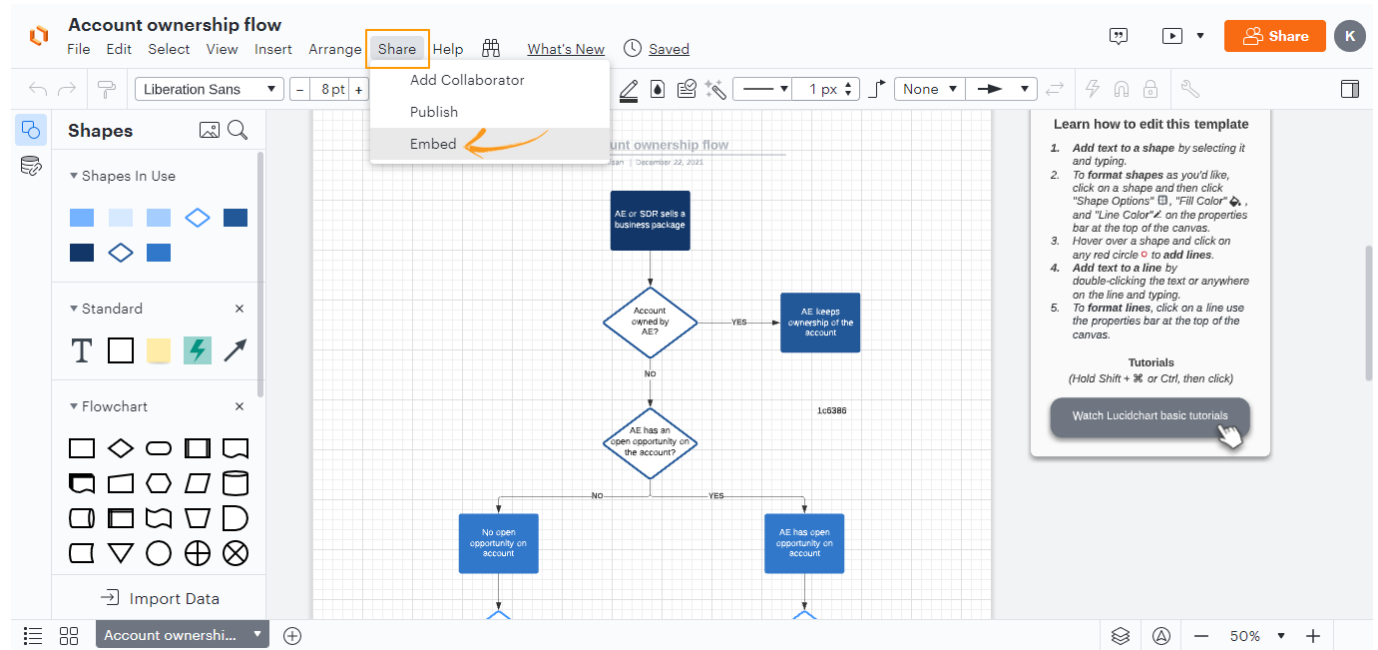
**To embed any diagram or flowchart created in Lucidchart into a help article into the ProProfs Knowledge Base :**

**Step 1:** Log in to your Lucidchart account

**Step 2:** Create a new Lucidchart from scratch or use a template.



**Step 3:** Once done, navigate to **Share >> Embed** in the menu bar.



**Step 4:** Click 'Activate' to activate the embed code. Copy it and click 'Done.'

## Share

### Embed

</> Embed your continuously updated document on your intranet or web page.

#### Size

Medium (640 x 480) ▼

Width 

640

 Height 

480

### HTML

```
<div style="width: 640px; height: 480px; margin: 10px; position: relative;"><iframe allowfullscreen frameborder="0" style="width:640px; height:480px" src="https://lucid.app/documents/embeddedchart/d41101bc-17b6-4c72-8907-321aa308198e" id="XQKA0s2ExvJX"></iframe></div>
```

Activate Embed Code

Done

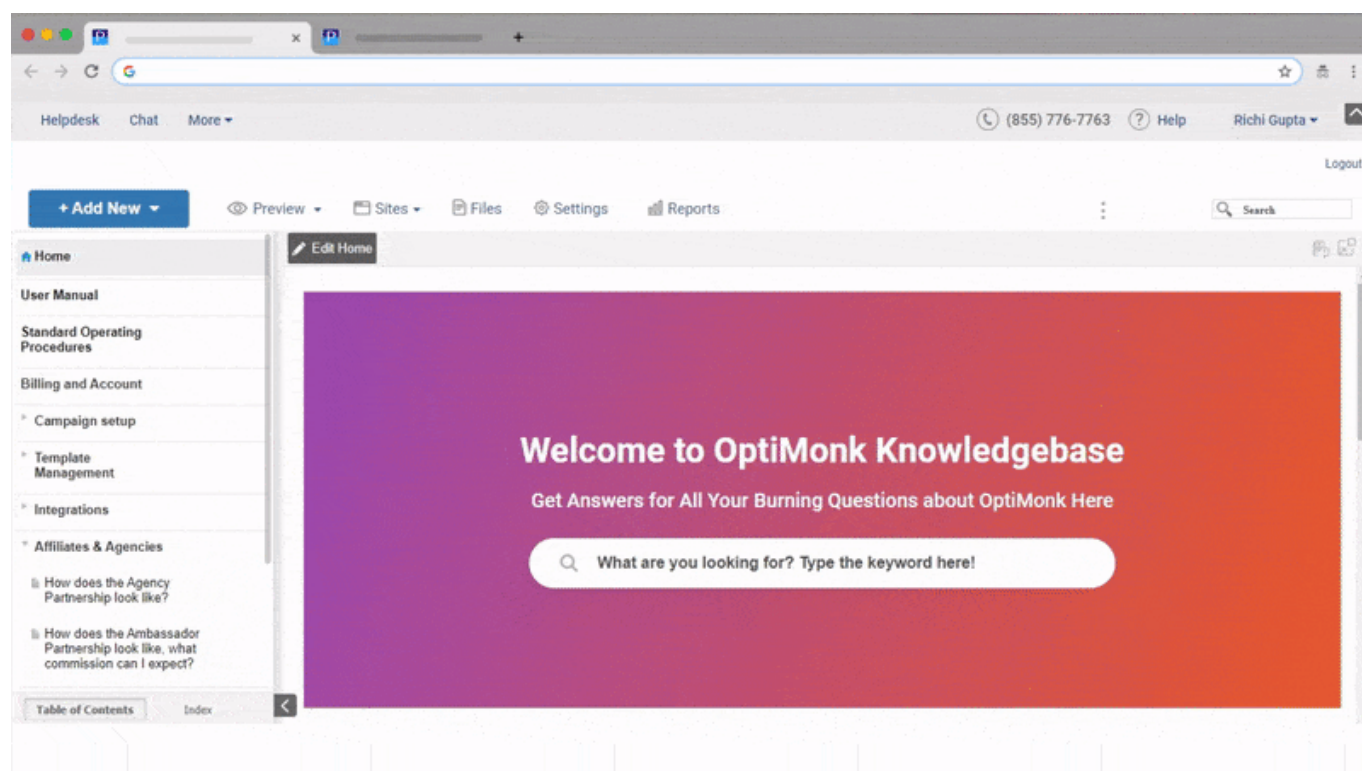
**Step 5:** Log in to your **ProProfs Knowledge Base account** and select the **article** in which you want to display the **Lucidchart**.

**Step 6:**

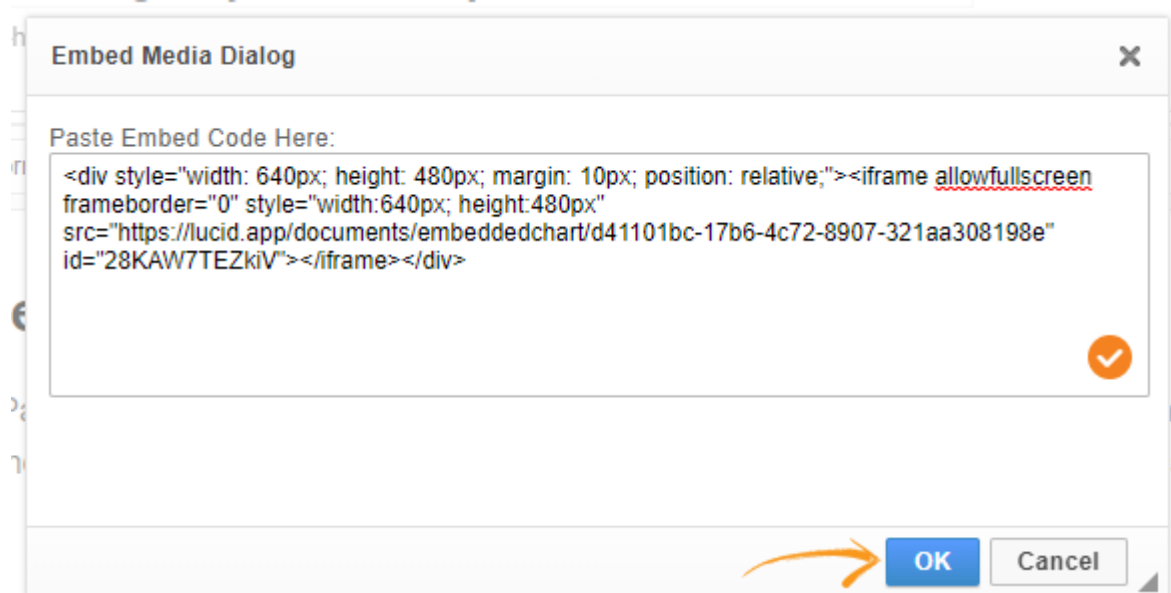
- Click '**Edit Page**'
- Select the **Embed icon** to embed media

Copyright © 2014 ProProfs

Page 543



- **Paste** the **embed code** you copied into the space provided.
- Click '**OK**'



**Step 7:** Click '**Save**' to finalize changes and then '**Preview**' to see the changes made.

**Note:** If your article is already published, and you want to make these changes live, click '**Update**' after previewing the changes.

## How does the Agency Partnership look like?

URL: <http://online-help-manual-new-test.helpdocsonline.com/what-new>

Status: Published

Save
Preview
Update

Styles
Normal
Font
Size

A
A
B
I
U
S

Source
Insert

## How does the Agency Partnership look like?

Our Agency Partnership program is available for all Marketing agencies and consultants who manage digital campaigns for their clients. You can open an Agency Account and extend your services by offering "onsite retargeting" and price it as you wish.

Here's what the embedded Lucidchart will look like in an article.

[Knowledge Base Home](#)
[Pricing](#)
[Schedule a Demo](#)
[Sign Up Free](#)

[Home](#)

- [Billing and Account](#)
- [Campaign setup](#)
- [Template Management](#)
- [Integrations](#)
- [Affiliates & Agencies](#)
- [For Developers](#)

## How does the Agency Partnership look like?

Our Agency Partnership program is available for all Marketing agencies and consultants who manage digital campaigns for their clients. You can open an Agency Account and extend your services by offering "onsite retargeting" and price it as you wish.

**Account ownership flow**

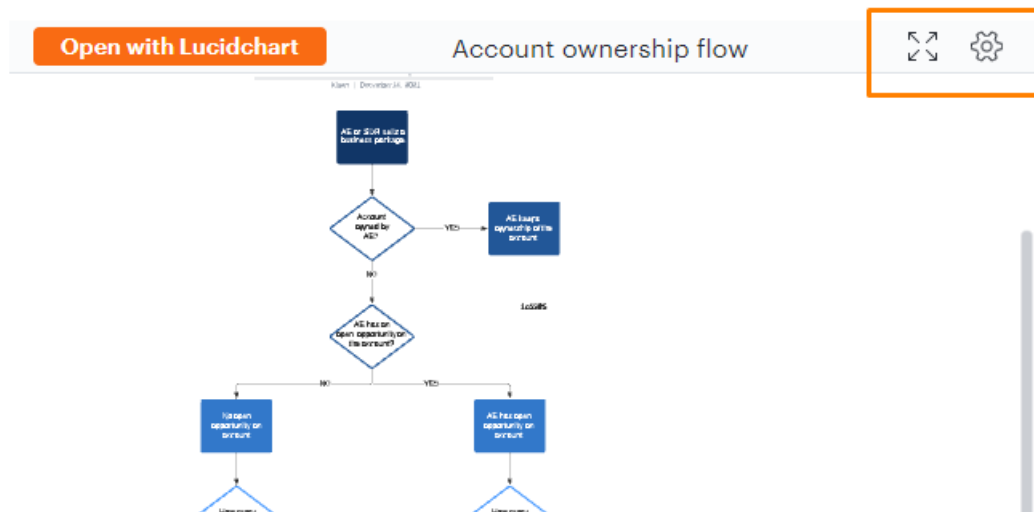
View | December 22, 2021

[Table of Contents](#)
[Index](#)

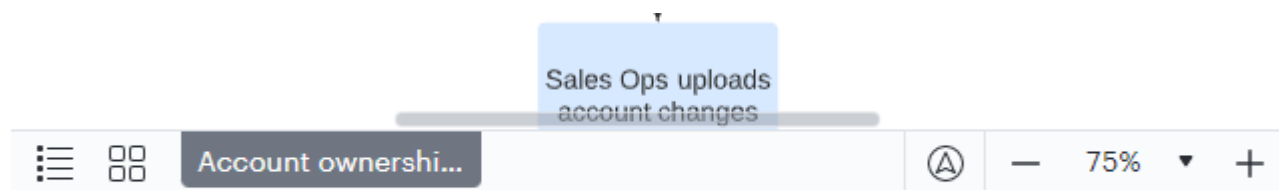
[Support](#)

You **get controls** to view it in **full screen** and **edit settings** by clicking on the **gear** ' ' icon.

Our Agency Partnership program is available for all Marketing agencies and consultants who manage digital camp can open an Agency Account and extend your services by offering "onsite retargeting" and price it as you wish.



At the bottom of the chart, you get a bunch of controls to customize it further.



*That is all about embedding Lucidcharts in a help article created with ProProfs Knowledge Base.*

### Related Articles:

- [Multiple Language Support](#)
- [Working With Images](#)
- [How to Create a Multi Branding Help Site](#)

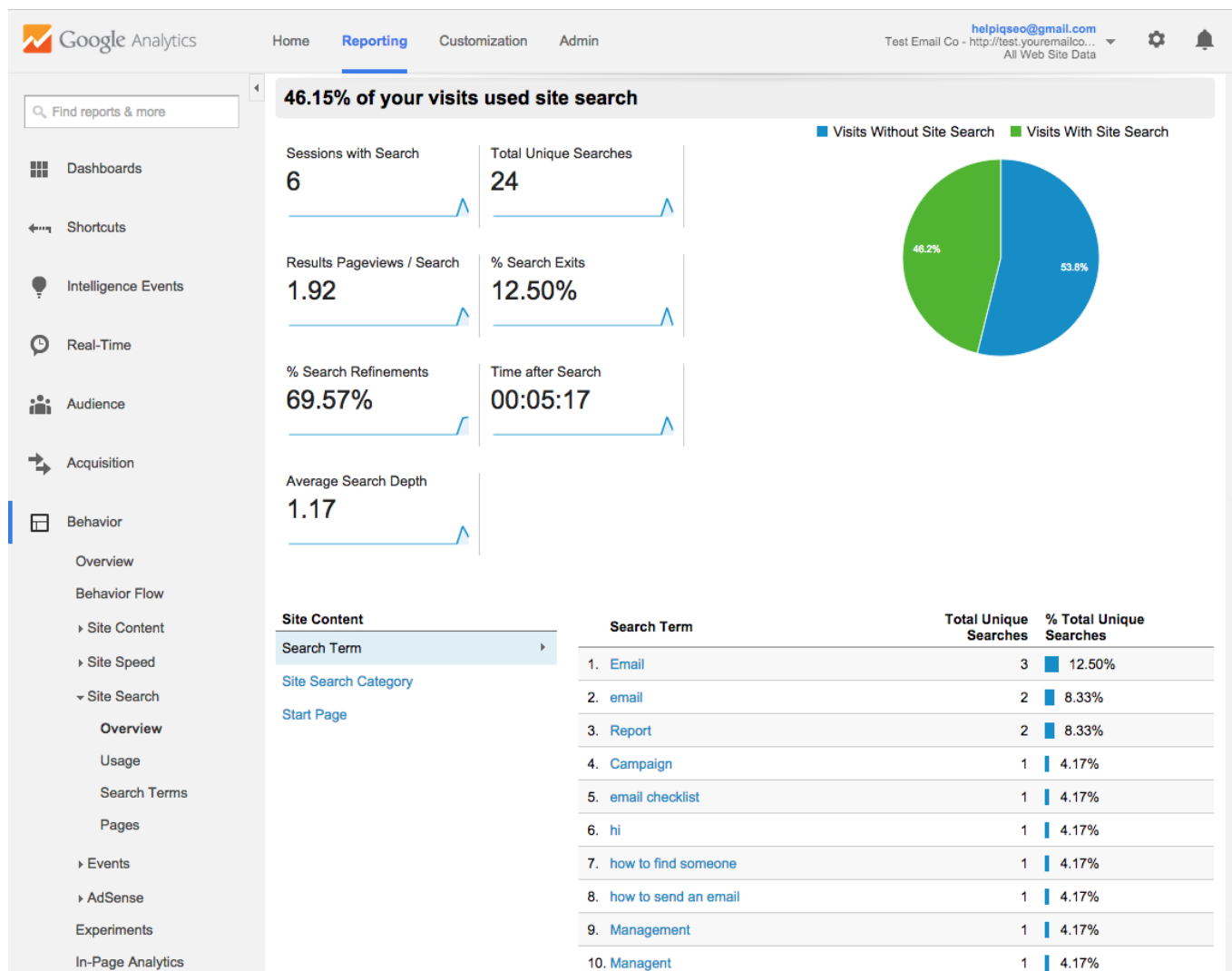
# Google Analytics Integration With ProProfs Knowledge Base



## How does this integration help me?

Google Analytics is a free web analytics tool that gives you rich insights into your website traffic. It's powerful and easy-to-use features, let you see and analyze your traffic data in an insightful way. You can [integrate your ProProfs site](#) with Google Analytics to gain insight into what your visitors are doing.

**ProProfs also includes ready to use powerful reports.**



## View what customers search

You can look-up the exact keywords that customers are using to find information in your knowledge base. This helps you write help articles that customers are desperately looking for and avoid obscure topics that they don't really care about.

## Track popular landing pages

Along with site search terms, you can track the knowledge base pages that are most viewed by customers. You can use this data to display a list of popular articles on your FAQ's homepage to and offer other users quick access to important information.

## Trace the customer's path

You can also find out where users go after landing on a page. This is called a behavior flow



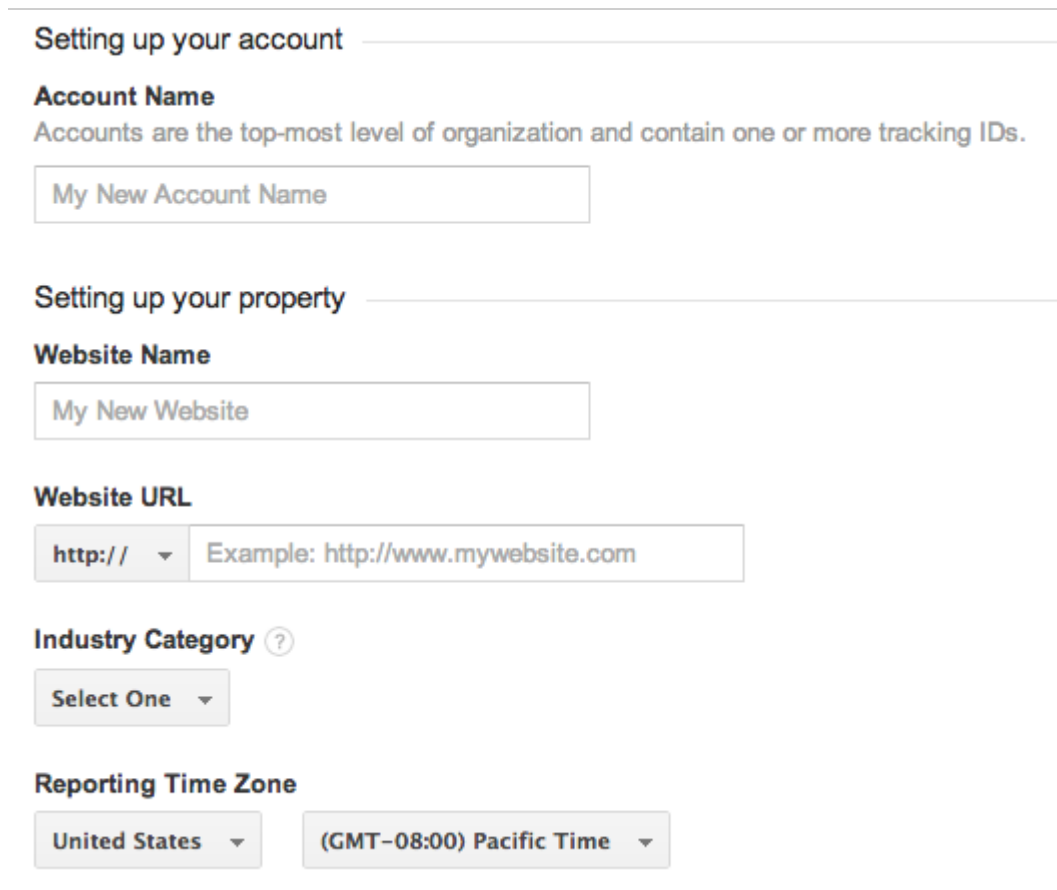
report, that shows the path users take through your knowledge base. It's a key metric that helps you identify those black sheep solutions that lead users astray, and what must be done to improve the UX of your knowledge base.

## How do I set it up?

- [Setting Up Google Analytics](#)
  - [Installing Google Analytics in ProProfs](#)
  - [Check to See if It Is Working](#)
  - [Finding Your Tracking Code](#)
  - [Tracking Internal Site Searches](#)
  - [Turning Off Google Analytics](#)
- 

## Setting up Google Analytics

1. The first step is to log into Google Analytics at <http://www.google.com/analytics/>. The main settings page will appear which may list accounts that you have already added in the past.
2. Click **Settings** at the top. In the first column is the **Accounts** section. Click on the dropdown and then select **Create new account**.



**Setting up your account**

**Account Name**  
Accounts are the top-most level of organization and contain one or more tracking IDs.

My New Account Name

**Setting up your property**

**Website Name**

My New Website

**Website URL**

http:// Example: http://www.mywebsite.com

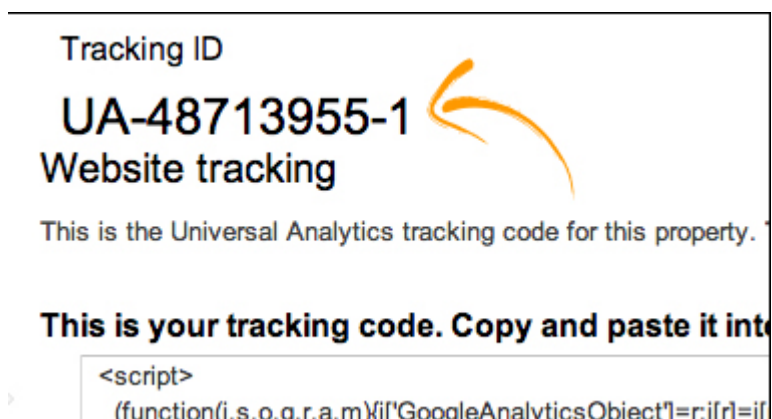
**Industry Category** ?

Select One

**Reporting Time Zone**

United States (GMT-08:00) Pacific Time

3. Enter in an Account Name and Website Name to identify your site.
4. Enter the **Website URL** of your site (such as mycompany.helpdocsonline.com) or your custom domain (such as help.mycompany.com). Make sure to select **http://** from the drop-down menu in front of the text box.
5. Optionally select your industry and reporting time zone.
6. Select your country and time zone.
7. Click **Get Tracking ID** to generate the tracking code. A new screen will appear.



**Tracking ID**

**UA-48713955-1**

**Website tracking**

This is the Universal Analytics tracking code for this property.

**This is your tracking code. Copy and paste it into**

```
<script>
(function(f,i,s,o,a,r,a,m){if('GoogleAnalyticsObject')=r;if(!=if
```

8. Locate the **Tracking ID** and copy the code that looks like UA-xxxxxxx-x or write it down.

Please ignore all the tracking code Google provides. All we need is your UA-xxxxxxx-x

number. We handle the rest of the code.

## Installing Google Analytics in ProProfs

1. Log in to your account (as an administrator), and click **Settings > Configure & Brand**.
2. Select the site you want to install Google Analytics for.
3. Click the **Integrations** tab.
4. Locate the section titled Google Analytics and paste your UA-xxxxxxx-x code.

### Google Analytics

To run Google Analytics for this site, paste in your tracking code. [Learn more](#)

UA-41820368-1 format of UA-#####-#.

5. Click **Save**.

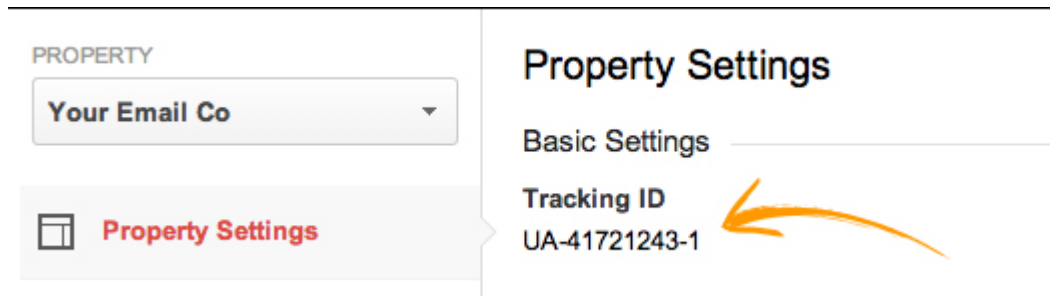
## Check to see if it is working

1. After 24 hours or so, go back to <http://www.google.com/analytics/> to check that you have successfully set up Google Analytics.
2. Next to your site's URL, Google Analytics will show it is either Receiving Data (you were successful) or Tracking Not Installed (something is wrong).
3. If it says Tracking Not Installed, click **Check Status**. Google then checks your site for the Analytics Code and reports back whether it finds it or not.
4. If not, try re-pasting your UA-xxxxxxx-x code into ProProfs and checking the status again.

It can take up to 24 hours for Google Analytics to start receiving data. If after 24 hours it is still not working, contact our support department at [support@ProProfs.com](mailto:support@ProProfs.com). Read this [Google Article](#) to find out why it takes so long.

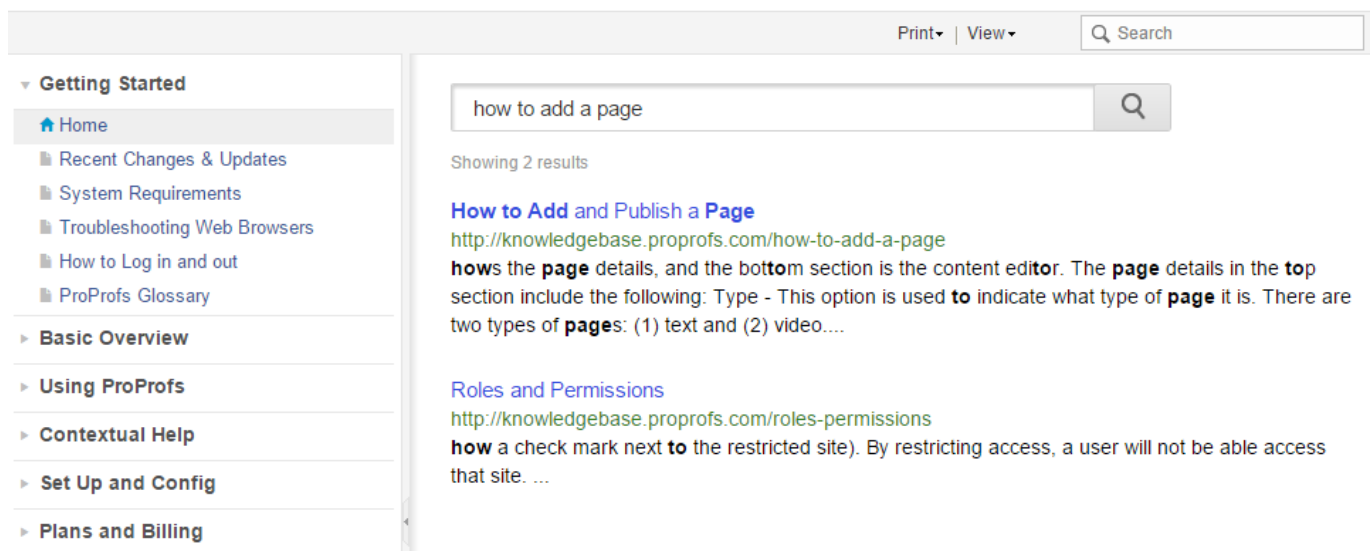
## Finding your tracking code

If at any time you need to find your tracking code, you can access it from the administration settings screen in Google Analytics. Look for a link labeled **Property Settings**. Then look for the Tracking ID that looks like UA-xxxxxxx-x.



## Tracking internal site searches

Your ProProfs site comes with a robust search feature that instantly makes are you content searchable by your visitors. However, do you want to know what your end users are searching for and what pages they are clicking on?

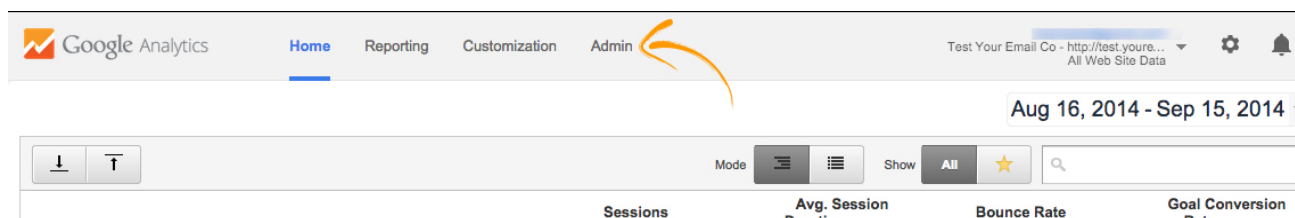


## Activate site search

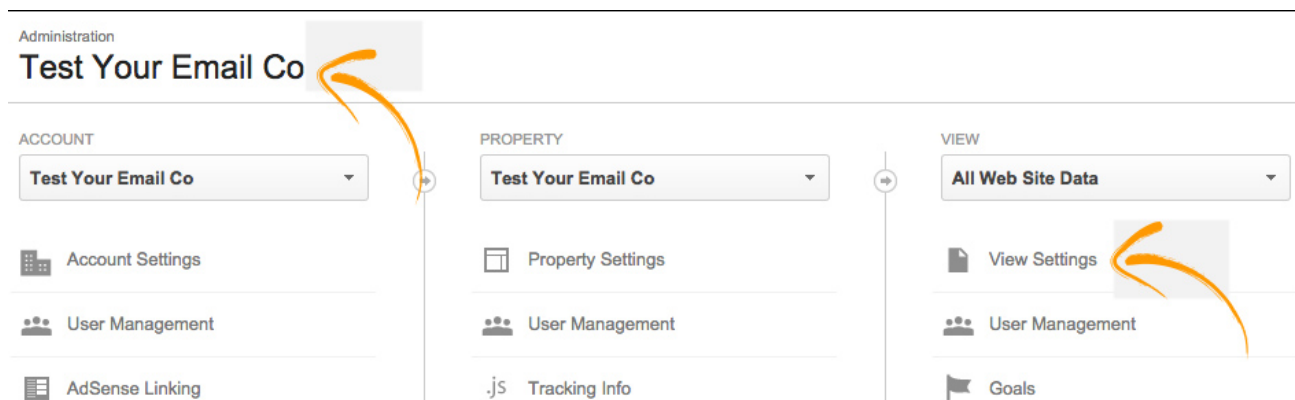
By connecting Google Analytics to your ProProfs account you can take advantage of the Site Search reports. A search box is a goldmine of information because each time users search, they tell you in their own words exactly what they are looking for.

After you setup and install Google Analytics as defined above you will need to activate Site Search as it's not enabled by default.

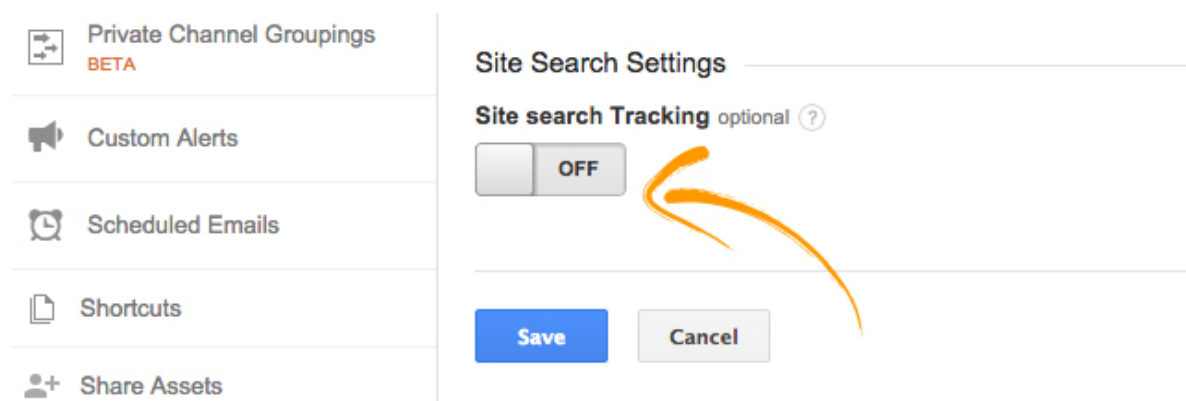
1. On the top menu select **Settings**.



2. Make sure the site you add is selected. Then click **View Settings**.



3. Scroll down the page and look for the **Site Search Settings** and turn it **ON**



4. For the Query Parameter enter: **Search** then click **Save**

**Site Search Settings**

**Site search Tracking** optional ?

**ON**

**Query parameter**  
Use commas to separate up to 5 parameters (case insensitive)

search

☐ Strip query parameters out of URL ?

**Site search categories** optional

**OFF**

**Save** **Cancel**

5. Site Search will not be activated. On the top menu select **Reporting**

It may take up to 48 hours for data to appear in your reports once you have configured Site Search.

## Site search reporting

Looking at where people search can give you insight into how they use your site. Are they searching from the home page, or do they go deeper into the site before searching? Do they search from search results pages, immediately following one search with another? From any given page, what do they search for?

To access the reporting on the top menu select **Reporting** . Then on the left-side menu select **Behavior > Site Search**.

### Explore where users begin searches and what they find

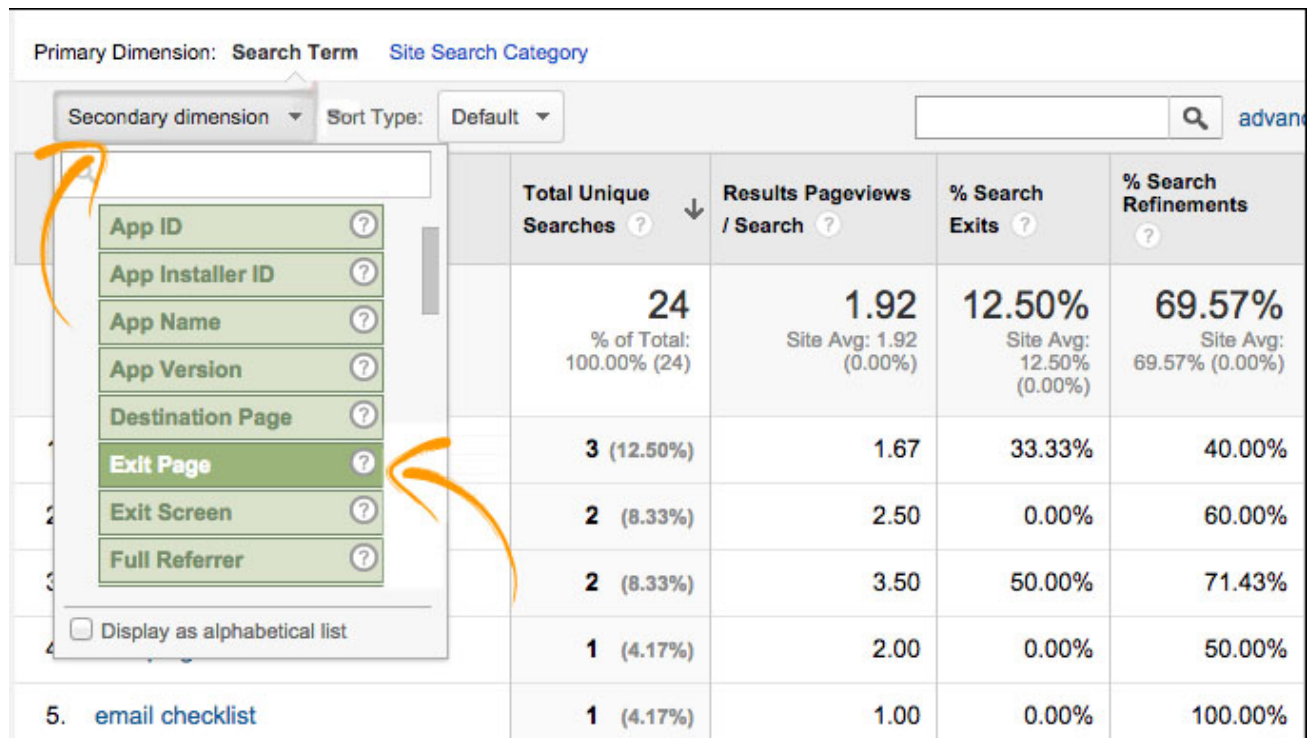
1. Go to **Site Search > Pages** to identify the pages from which users started searching.
2. Click one of the pages in the table to see the search phrases used from that page.

### What pages users have clicked on

You can also determine what pages the user clicks on after performing a search

1. Go to **Site Search > Search Terms** to see a list of search terms

## 2. From the **Secondary Dimension** select **Behavior > Exit Page**



Primary Dimension: Search Term	Site Search Category	Secondary dimension	Sort Type: Default	Total Unique Searches	Results Pageviews / Search	% Search Exits	% Search Refinements
		App ID		24	1.92	12.50%	69.57%
		App Installer ID		% of Total: 100.00% (24)	Site Avg: 1.92 (0.00%)	Site Avg: 12.50% (0.00%)	Site Avg: 69.57% (0.00%)
		App Name					
		App Version					
		Destination Page					
		Exit Page		3 (12.50%)	1.67	33.33%	40.00%
		Exit Screen		2 (8.33%)	2.50	0.00%	60.00%
		Full Referrer		2 (8.33%)	3.50	50.00%	71.43%
				1 (4.17%)	2.00	0.00%	50.00%
5. email checklist				1 (4.17%)	1.00	0.00%	100.00%

3. Now there are two columns: Search Term and Exit page. The Search Term is what your users searched for. The Exit Page is what the user clicked on after performing a search. If you see `/?search=term` this means they performed another search while still on your ProProfs search results page.

Search Term ?	Exit Page ?	Total Unique Searches ?	Results Pageviews / Search ?	% Search Exits ?
		24 % of Total: 100.00% (24)	1.92 Site Avg: 1.92 (0.00%)	12.50% Site Avg: 12.50% (0.00%)
1. Campaign	/how-to-sign-in-and-out-of-your-account	1 (4.17%)	2.00	0.00%
2. email	/?search=hi	1 (4.17%)	1.00	0.00%
3. email	/how-to-sign-in-and-out-of-your-account	1 (4.17%)	4.00	0.00%
4. Email	/?search=Email	1 (4.17%)	1.00	100.00%
5. Email	/?search=Report	1 (4.17%)	2.00	0.00%
6. Email	/how-to-sign-in-and-out-of-your-account	1 (4.17%)	2.00	0.00%
7. email checklist	/how-to-turn-javascript-on	1 (4.17%)	1.00	0.00%
8. hi	/?search=hi	1 (4.17%)	1.00	100.00%
9. how to find someone	/how-to-turn-javascript-on	1 (4.17%)	1.00	0.00%
10. how to send an email	/how-to-turn-javascript-on	1 (4.17%)	1.00	0.00%

## Turning Off Google Analytics

If you have Google Analytics enabled, you can turn it off at any time by doing the following:

1. Log in to your account (as an administrator), and click **Settings > Add, Edit, Customize Sites**.
2. Select the site you want to remove Google Analytics for.
3. Click the **Integrations** tab.
4. Locate the section titled Google Analytics and delete your UA-xxxxxxx-x code.
5. Click **Save**.

### Related Articles:

[SalesForce](#)  
[Desk.com](#)

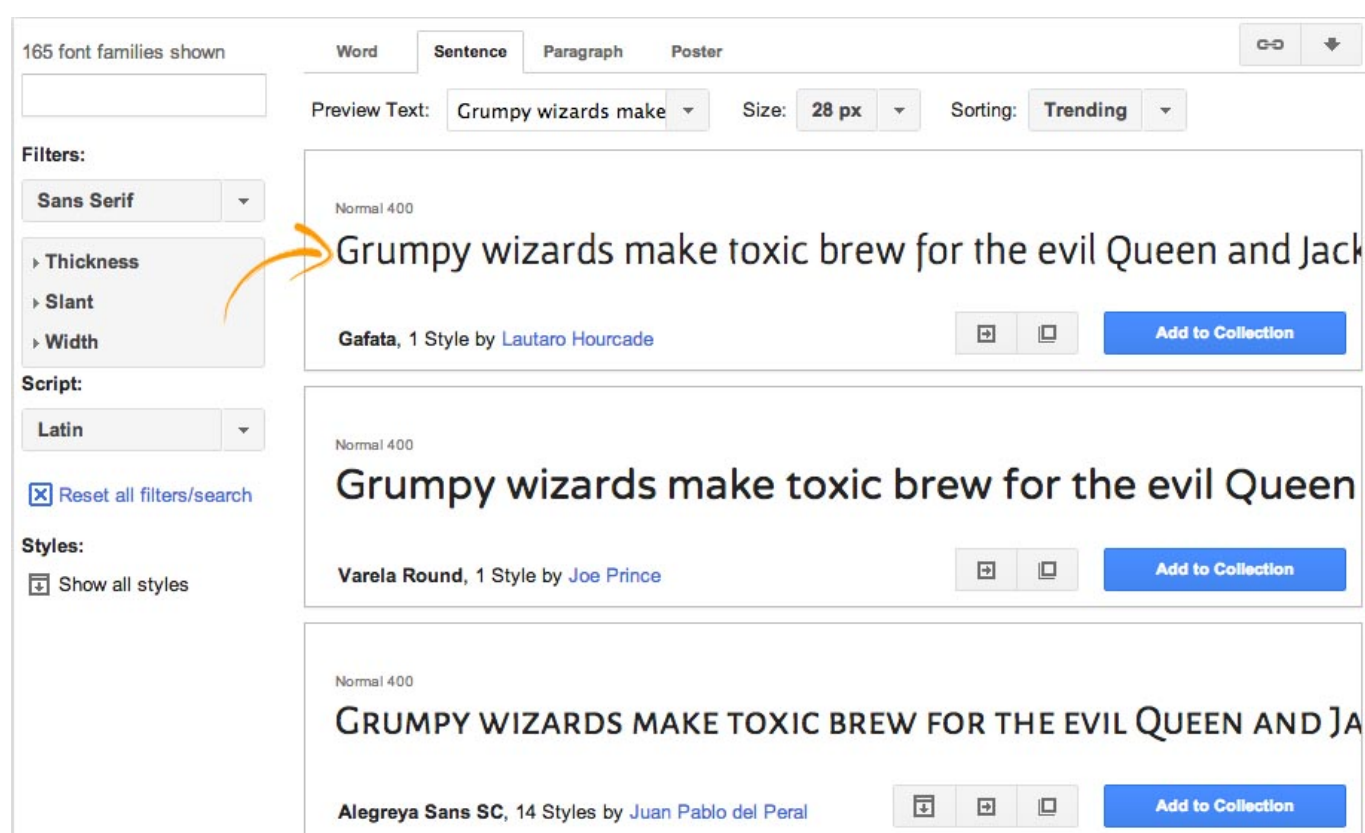


## Google Fonts

# Google Fonts Integration With ProProfs Knowledge Base

## How does this integration help me?

You no longer have to use boring [web-safe](#) fonts like Verdana or Times on your site. Google Fonts allows you to choose from hundreds of free non-web safe fonts. Normally using non-web safe fonts meant that if a visitor didn't have that font on installed their computer they wouldn't see it. With Google Fonts these fonts are stored on Google's servers and simply served to your site.



## How do I set it up?

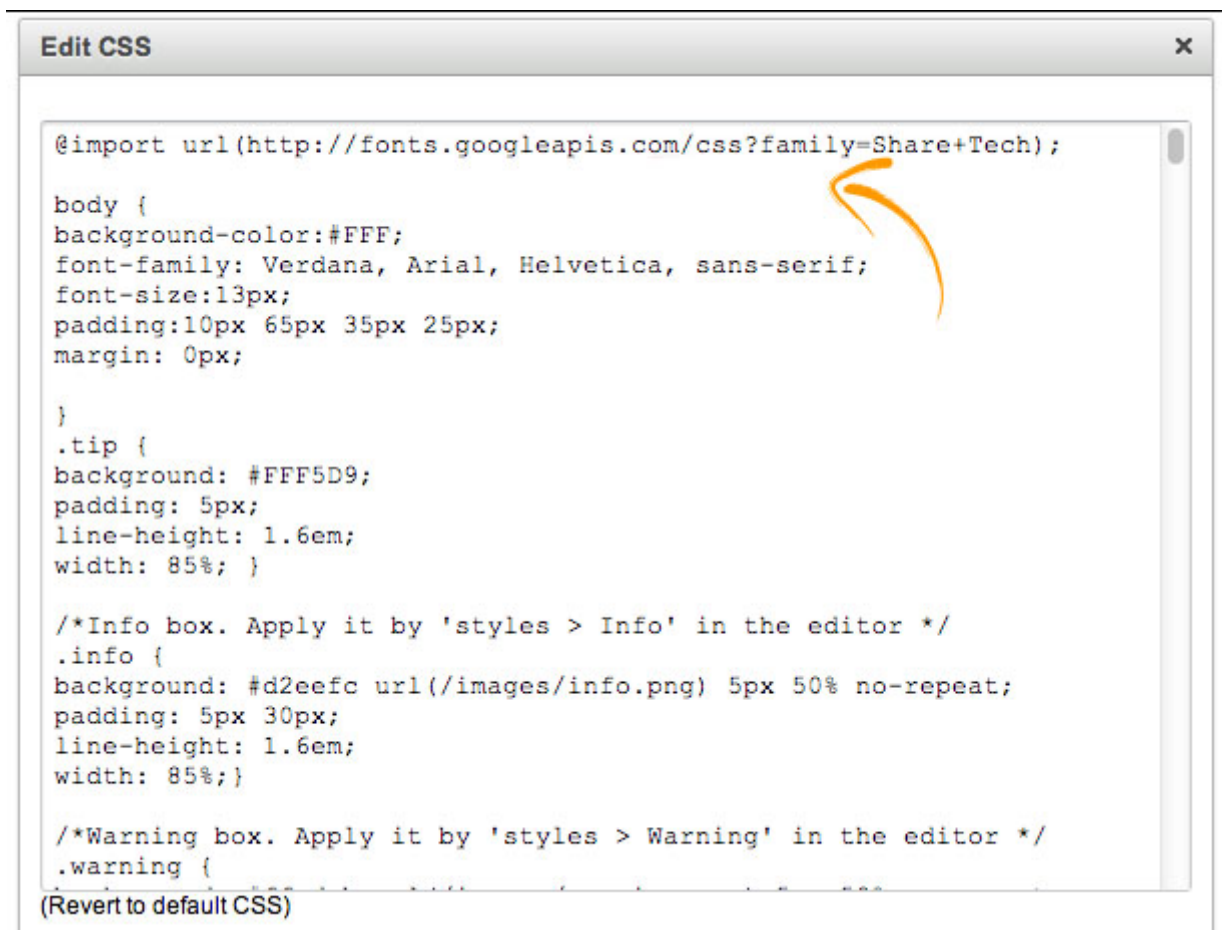
**Step 1.** Go to <http://www.google.com/webfonts>

**Step 2.** Select the font you want to use. Google will then provide several options for how you want to use it. Select **Import** and copy the provided code.



**Step 3.** Edit any page in ProProfs. Press the  toolbar button. An overlay will appear displaying your site's CSS.

**Step 4.** In the overlay paste in the code on the top line.



**Step 5.** Add the font name to your CSS styles just as you'd do normally with any other font. Locate the font family attribute as highlighted below and paste in the new font stack.

```
body {
background-color:#FFF;
font-family: 'Share Tech', sans-serif;
font-size:12px;
padding:15px;
margin: 0px; }
```

**Step 6.** Click **OK** to save.

**Related Articles:**

[SalesForce](#)

[Desk.com](#)

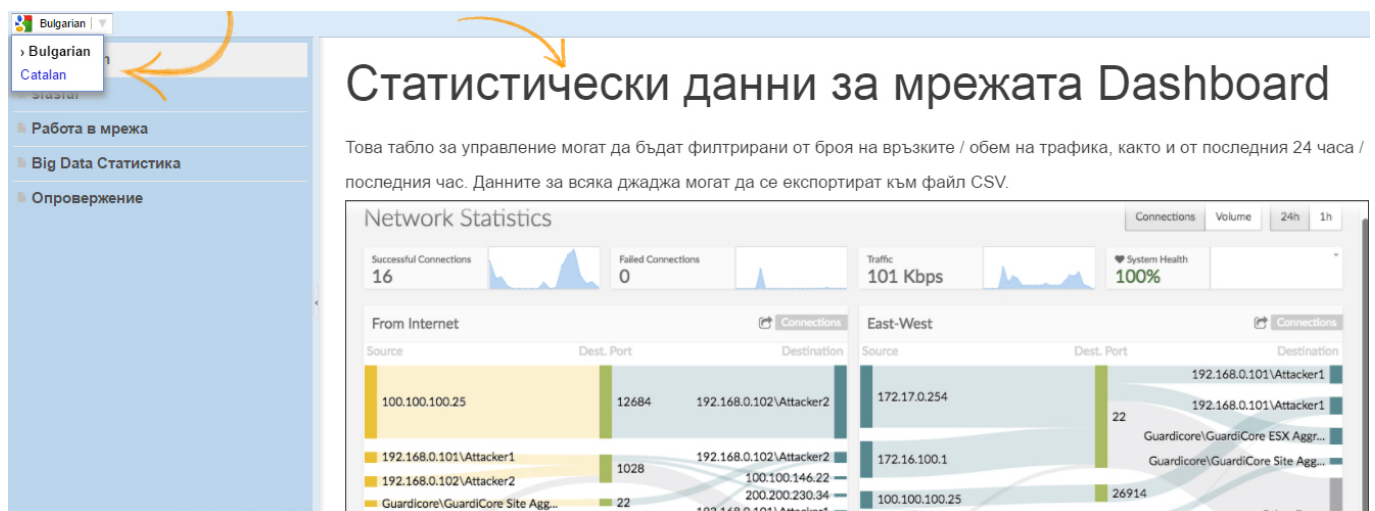
[Google Analytics](#)

# Google Translate Integration With ProProfs Knowledge Base

How does this integration help me?

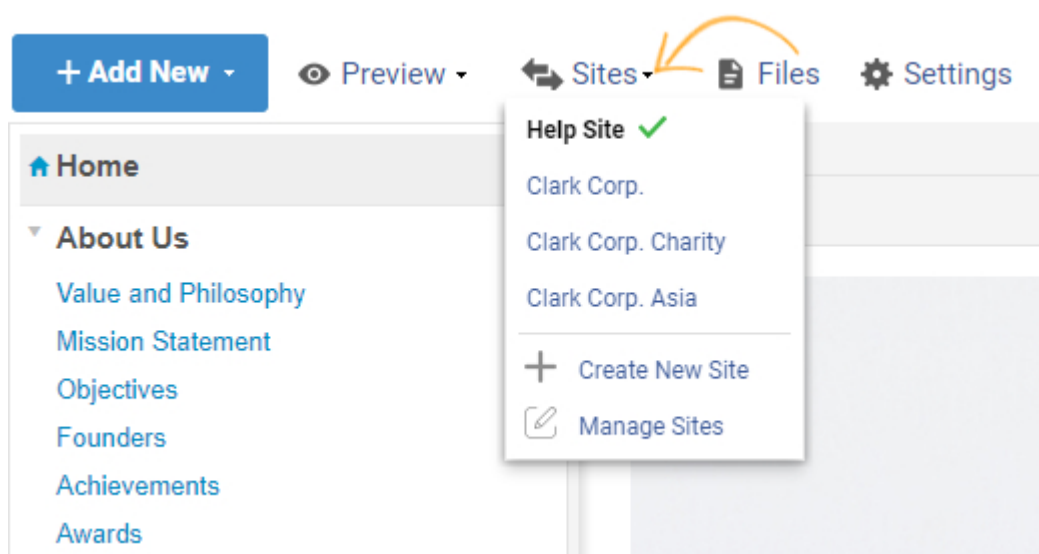
Google Translate is a free service that you can add to your ProProfs site to make it instantly available in 60+ languages. This is a great option if you do not have the resources to translate your site into every language you need. Google also provides the ability to manage your translations. Log in to Google and enter manual corrections to improve the translation of a sentence, phrase, or word. Once you add Google Translate to your site, a drop-down menu will appear where your readers can instantly change the language of the site.

Here's how your website would appear with Google Translate:



Follow these simple steps to add Google Translate:

**Step1.** Login to your ProProfs Knowledgebase, and select the site to integrate Google Translate.



**Step2.** Click "Settings" and navigate to "Integrations."

## Settings

Setup and control your account



Configure & Brand



Private Sites



Users



My account



Back Up Site



Save Site as PDF



Feedback



Import Files



In-App Help



Integrations

**Step3.** Select "Integrate."

**Integrations** ← [back to settings](#)



ProProfs Chat



Zendesk



Forms



Integrate



Yammer Integration

**Step4.** Under "Google Translate", you would need to add language codes for the languages you want on your site.

## Add chat and other third-party integrations to your site

Paste in code that needs to run just before `</body>` tag.

Paste in code that needs to run just before `</head>` tag.

## Google Translate

Make your website instantly available in 60+ languages. [Learn more](#)

**Step5.** Follow this [link](#) for the list of language codes. See the image below.

Google Cloud Platform

Why GoogleProductsSolutionsLauncherPricingCustomersDocumentationSupportPartners

Translation API

Product OverviewDocumentationQuickstart

How-to Guides

All How-to GuidesAuthenticating to the APITranslating TextDiscovering Supported LanguagesDetecting LanguageUsing the Premium Edition

APIs & Reference

All APIs & ReferencesClient LibrariesREST ReferenceLanguage Support

Samples & Tutorials

Sample Applications

Language	ISO-639-1 Code
Afrikaans	af
Albanian	sq
Amharic	am
Arabic	ar
Armenian	hy
Azerbaijani	az
Basque	eu
Belarusian	be
Bengali	bn
Bosnian	bs
Bulgarian	bg
Catalan	ca
Cebuano	ceb (ISO-639-2)
Chichewa	ny

**Step6.** Add the language codes in Google Translate text box from **Step4**. For multiple languages, separate the codes with a comma without any space.

Paste in code that needs to run just before `</head>` tag.

## Google Translate

Make your website instantly available in 60+ languages. [Learn more](#)

bg,ca

**Step7.** Once you're done, click save and open your site in a fresh tab.

**Network Statistics Dashboard**

This dashboard can be filtered by number of connections/traffic volume as well as by last 24 hours/last hour. Data on each widget can be exported to a CSV file.

**Network Statistics**

Successful Connections: 16, Failed Connections: 0, Traffic: 101 Kbps, System Health: 100%

**From Internet**

Source	Dest. Port	Destination
100.100.100.25	12684	192.168.0.102\Attacker2
192.168.0.101\Attacker1	1028	192.168.0.102\Attacker2
192.168.0.102\Attacker2	100.100.146.22	100.100.146.22
Guardicore\GuardCore Site Aggr...	22	200.200.230.34
100.100.146.221	20251	192.168.0.101\Attacker1

**East-West**

Source	Dest. Port	Destination
172.17.0.254	22	192.168.0.101\Attacker1
172.16.100.1	22	192.168.0.101\Attacker1
Guardicore\GuardCore ESX Aggr...	22	Guardicore\GuardCore ESX Aggr...
Guardicore\GuardCore Site Aggr...	22	Guardicore\GuardCore Site Aggr...
100.100.100.25	26914	100.100.100.25
192.168.0.102\Attacker2	443	Other Dests

**Step8.** The languages you add would appear as shown below.

**Статистически данни за мрежата Dashboard**

Това табло за управление могат да бъдат филтрирани от броя на връзките / обем на трафика, както и от последния 24 часа / последния час. Данните за всяка джаджа могат да се експортират към файл CSV.

**Network Statistics**

Successful Connections: 16, Failed Connections: 0, Traffic: 101 Kbps, System Health: 100%

**From Internet**

Source	Dest. Port	Destination
100.100.100.25	12684	192.168.0.102\Attacker2
192.168.0.101\Attacker1	1028	192.168.0.102\Attacker2
192.168.0.102\Attacker2	100.100.146.22	100.100.146.22
Guardicore\GuardCore Site Aggr...	22	200.200.230.34
100.100.146.221	20251	192.168.0.101\Attacker1

**East-West**

Source	Dest. Port	Destination
172.17.0.254	22	192.168.0.101\Attacker1
172.16.100.1	22	192.168.0.101\Attacker1
Guardicore\GuardCore ESX Aggr...	22	Guardicore\GuardCore ESX Aggr...
Guardicore\GuardCore Site Aggr...	22	Guardicore\GuardCore Site Aggr...
100.100.100.25	26914	100.100.100.25
192.168.0.102\Attacker2	443	Other Dests

## Related Articles:



[SalesForce](#)

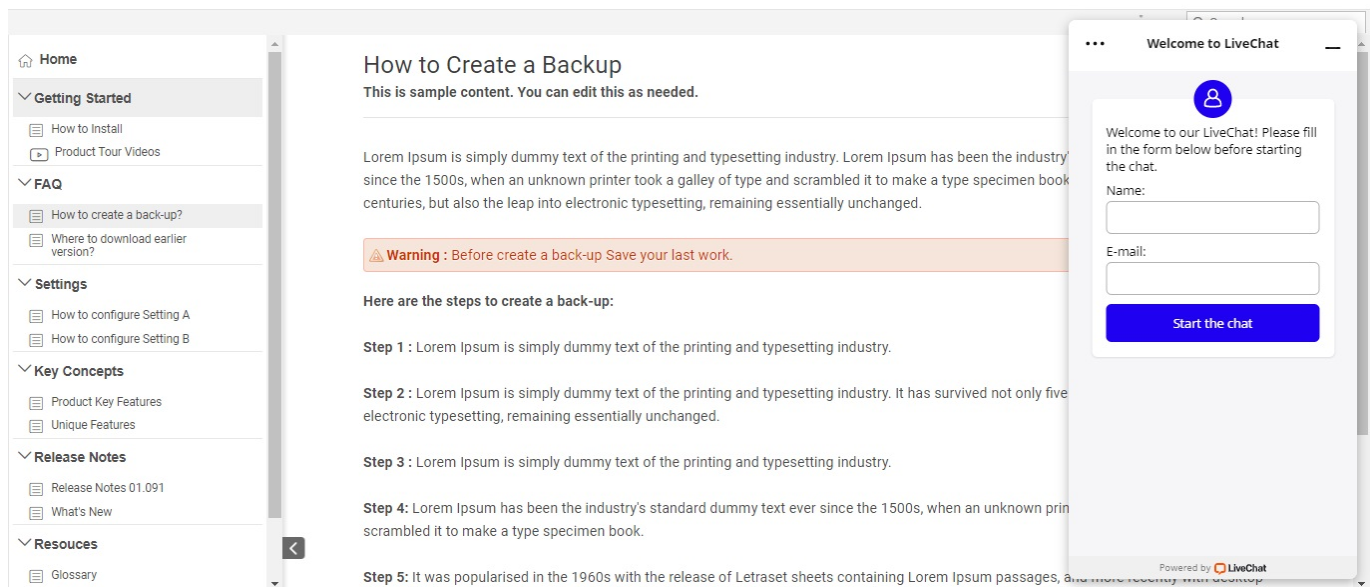
[Google Fonts](#)

[Google Analytics](#)

# LiveChat Integration With ProProfs Knowledge Base

## How does this integration help me?

Add a chat feature directly to your ProProfs site. LiveChat empowers your support group to answer questions and guide visitors to documentation directly from your ProProfs site. Customers get their questions answered immediately and leave your site feeling satisfied.



## Reduce tickets with real-time support

A knowledgebase reduces support tickets as customers can find answers on their own. You can reduce tickets further by embedding live chat, which allows customers to instantly connect with the support staff if they ever feel confused.

## Monitor knowledgebase visitors in real-time

With Live Chat embedded in your knowledge base, you can track visitors in real-time. You can view details like which articles they are reading, how much time they spent on a page, their country, the devices they are using, and more.

## Capture feedback easily



The embedded chat box in your knowledge base works as a feedback capture form. For instance, when your support staff is offline customers can leave a message or feedback using the Live Chat message box.

How do I set it up?

- [Setting up LiveChat](#)
- [Installing LiveChat in ProProfs](#)
- [Removing LiveChat](#)

## Setting up LiveChat

- To get started, you need to create a [LiveChat](#) account.
- After you sign up, you will be redirected to a page with the LiveChat code.

 **Install LiveChat code manually** 

1 Copy and paste this code before the closing `</body>` tag on every page of your website.

```
<!-- Start of LiveChat (www.livechatinc.com) code -->
<script type="text/javascript">
  window.__lc = window.__lc || {};
  window.__lc.license = 11901678;
  (function() {
    var lc = document.createElement('script'); lc.type = 'text/javascript'; lc.async
    +-----
```

**Copy code**

2 Reload your website. LiveChat should appear in the bottom right corner.

Need help? [Send this task to your developer](#) OR [check install guide](#)

- Copy the provided code.

## Installing LiveChat in ProProfs

The next step is to install LiveChat in ProProfs.

**Step 1:** Log in to your account (as an administrator), and click Settings > **Add, Edit, Customize Sites**.

**Step 2:** Select the site you want to install it for.

**Step 3:** Click the **Integrations** tab.

**Step 4:** Locate the section where you put code that runs before </body> and paste in the code.

### Add chat and other third-party integrations to your site

Paste in code that needs to run just before </body> tag.

```
<!-- Start of LiveChat (www.livechatinc.com) code -->
<script type="text/javascript">
  window.__lc = window.__lc || {};
  window.__lc.license = 11901678;
  (function() {
```

**Step 5:** Another way to add LiveChat to your Knowledge Base just add the **email** of your LiveChat account and you're ready to go.

### LiveChat

To run LiveChat for this site, put your email.

**Step 6:** Click **Save**.

**Step 7:** Once you install LiveChat, you never have to add the code to ProProfs again. All changes you make inside of LiveChat will instantly update your chat configuration.

**Step 8:** To test, log in to your LiveChat account and enable chat. Then log out of ProProfs and go to your site's home page. A chat window should appear.

**Chat will ONLY run for logged-out users. Logged-in users will not see the chat option.**

## Removing LiveChat

If you have LiveChat enabled, you can remove it at any time by doing the following:

1. Log in to your account (as an administrator), and click **Settings > Add, Edit, Customize Sites**.
2. Select the site you want to remove it from.

3. Click on the **Integrations** tab.
4. Locate the LiveChat code and delete all of it.
5. Click **Save**.

**Related Articles:**

[Olark](#)

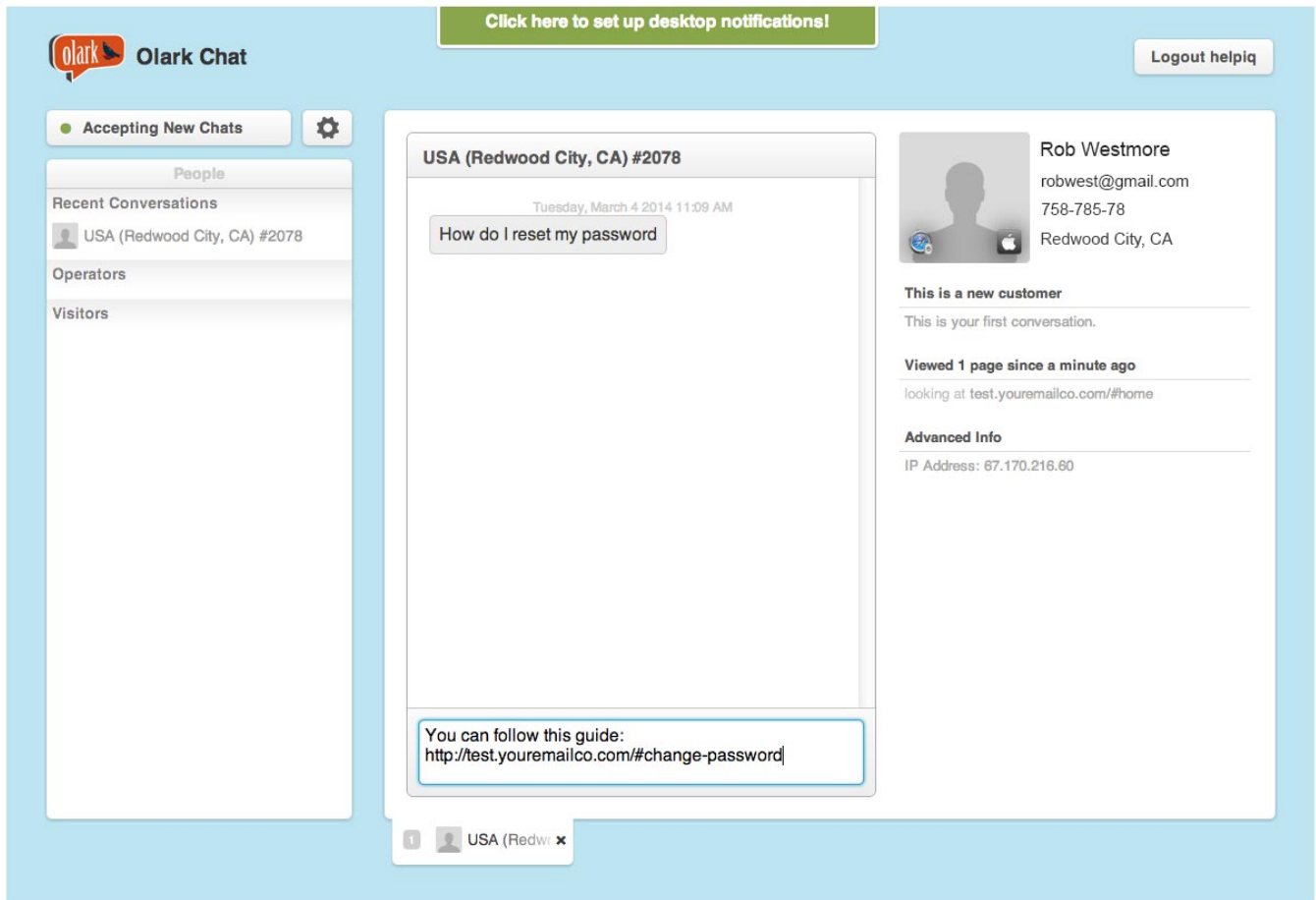
[TidioChat](#)

[ProProfs Chat](#)

# Olark Live Chat Integration With ProProfs Knowledge Base

## How does this integration help me?

You can add Olark chat directly to your ProProfs site. It empowers your support staff to answer questions and guide visitors to documentation directly from your ProProfs site. Customers get their questions answered immediately and leave your site feeling satisfied.



## Offer real-time help

With Olark chat embedded in your knowledgebase, you can win customers hearts and drive more sales by helping customers the moment they have a question.

## Monitor knowledgebase visitors

Ever wonder what your knowledgebase visitors are doing right now? Olark live chat shows you up-to-the-second updates on who is browsing your knowledge, from where, and what they are doing. drive more sales by helping customers the moment they have a question.

## Reduce support tickets

Catch customers the moment they get confused. Offer them help instantly, so they don't have to raise a ticket and wait for a resolution. You can even view the customer's screen and control their browser.

### How do I set it up?

- [Setting Up Olark](#)
- [Installing Olark in ProProfs](#)
- [Removing Olark](#)

---

## Setting up Olark

- To get started, you need to create an [Olark](#) account.
- Log in to Olark and click **Get Your Code**.

Copy and paste this code above the `</body>` tag in your source code. Read our [setup guide](#) for more help.

```
<!-- begin olark code -->
<script data-cfasync="false" type="text/javascript">*<![CDATA[*window.olark=
(function(c){var
f=window,d=document,l=f.location.protocol=="https:"?"https:":"http:",z=c.name,r=
"load";var qt=function(){
f[z]=function(){
(a.s=a.s||[]).push(arguments)};var a=f[z]._={
},q=c.methods.length;while(q--){(function(n){f[z][n]=function(){
f[z]("call",n,arguments)})(c.methods[q])}a.l=c.loader;a.i=qt;a.p={
?:+new Date};a.P=function(u){
```

Installing Olark as a plugin? Your Site ID is 3544-364-10-6033

- Copy the provided code.

## Installing Olark in ProProfs

The next step is to install Olark in ProProfs.

1. Log in to your account (as an administrator), and click Settings > **Add, Edit, Customize Sites**.
2. Select the site you want to install it for.
3. Click the **Integrations** tab.
4. Locate the section where you put code that runs before `</body>` and paste in the code.

#### Add chat and other third-party integrations to your site

Paste in code that needs to run just before `</body>` tag.



5. Click **Save**.
6. Once you install Olark, you never have to add the code to ProProfs again. All changes you make inside of Olark will instantly update your chat configuration.
7. To test, log in to your Olark account and enable chat. Then log out of ProProfs and go to your site's home page. A chat window should appear.

Chat will **ONLY** run for logged-out users. Logged-in users will not see the chat option.

## Removing Olark

If you have Olark enabled, you can remove it at any time by doing the following:

1. Log in to your account (as an administrator), and click **Settings > Add, Edit, Customize Sites**.
2. Select the site you want to remove it from.
3. Click on the **Integrations** tab.
4. Locate the Olark code and delete all of it.
5. Click **Save**.

#### Related Articles:

[LiveChat](#)

[TidioChat](#)

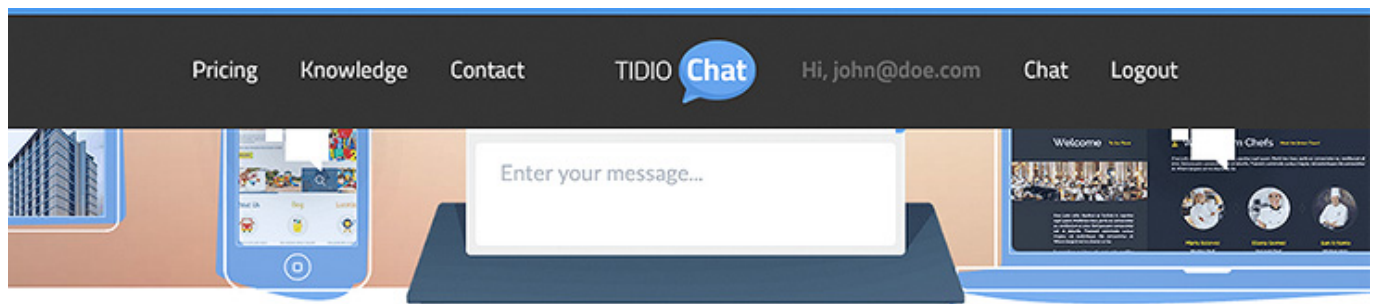
[ProProfs Chat](#)



# TidioChat Integration with ProProfs Knowledge Base

## How does this integration help me?

Tidio Chat is the fastest and easiest way to connect with your knowledgebase visitors in real-time. With Tidio Chat embedded in your ProProfs site, your support staff can answer questions and guide visitors to relevant documentation directly. Customers get their questions answered immediately and leave your site feeling satisfied.



## Help and Support

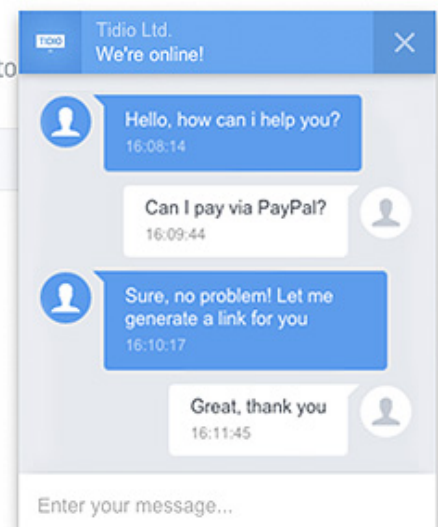
Learn more about Tidio Chat, find online manuals and get answers to

Search here...

Search

### Getting started (4)

- [Managing operators](#)
- [How to install chat on your website](#)
- [Conversation with a visitor](#)



## Offer real-time help

Use Tidio Chat to offer real-time support in your knowledge base. Guide your website visitors to relevant documentation via chat.

## Track knowledgebase visitors

With a chat embedded in your help site, you can see who is on your site, including their location, what they're viewing on your site, and the time they spend on the site.

## Capture feedback easily

Even when a support staff is not online, your knowledgebase visitors can instantly reach you by sending an offline message in the chat box.

## How do I set it up?

- [Setting Up TidioChat](#)
- [Installing TidioChat in ProProfs](#)
- [Removing TidioChat](#)

---

## Setting Up TidioChat

- To get started, you need to create a [TidioChat](#) account.
- After you sign up, go to Integrations, to get the code.



The screenshot shows the 'Install Code' section of the TidioChat interface. On the left, there is a vertical list of integrations: Shopify, WordPress, Bigcommerce, PrestaShop, Joomla, and Drupal. On the right, under the heading 'JavaScript', it says: 'To install TidioChat, put this code on every page of your website just before the closing </body> tag.' Below this text is a code block containing the JavaScript snippet: `<script src="//code.tidio.co/ig1d6hachb377fgm2jyqkba3ay4mays.js"></script>`. An orange arrow points from the text 'Copy this code' to the code block.

- Copy the provided code.

## Installing TidioChat in ProProfs

The next step is to install TidioChat in ProProfs.

1. Log in to your account (as an administrator), and click Settings > **Add, Edit, Customize Sites**.
2. Select the site you want to install it for.
3. Click the **Integrations** tab.
4. Locate the section where you put code that runs before `</body>` and paste in the code.

### Add chat and other third-party integrations to your site

Paste in code that needs to run just before `</body>` tag.



5. Click **Save**.
6. Once you install TidioChat, you never have to add the code to ProProfs again. All changes you make inside of TidioChat will instantly update your chat configuration.
7. To test, log in to your TidioChat account and enable chat. Then log out of ProProfs and go to your site's home page. A chat window should appear.

**Chat will ONLY run for logged-out users. Logged-in users will not see the chat option.**

## Removing TidioChat

If you have TidioChat enabled, you can remove it at any time by doing the following:

1. Log in to your account (as an administrator), and click **Settings > Add, Edit, Customize Sites**.
2. Select the site you want to remove it from.
3. Click on the **Integrations** tab.
4. Locate the TidioChat code and delete all of it.
5. Click **Save**.

### Related Articles:

[Olark](#)

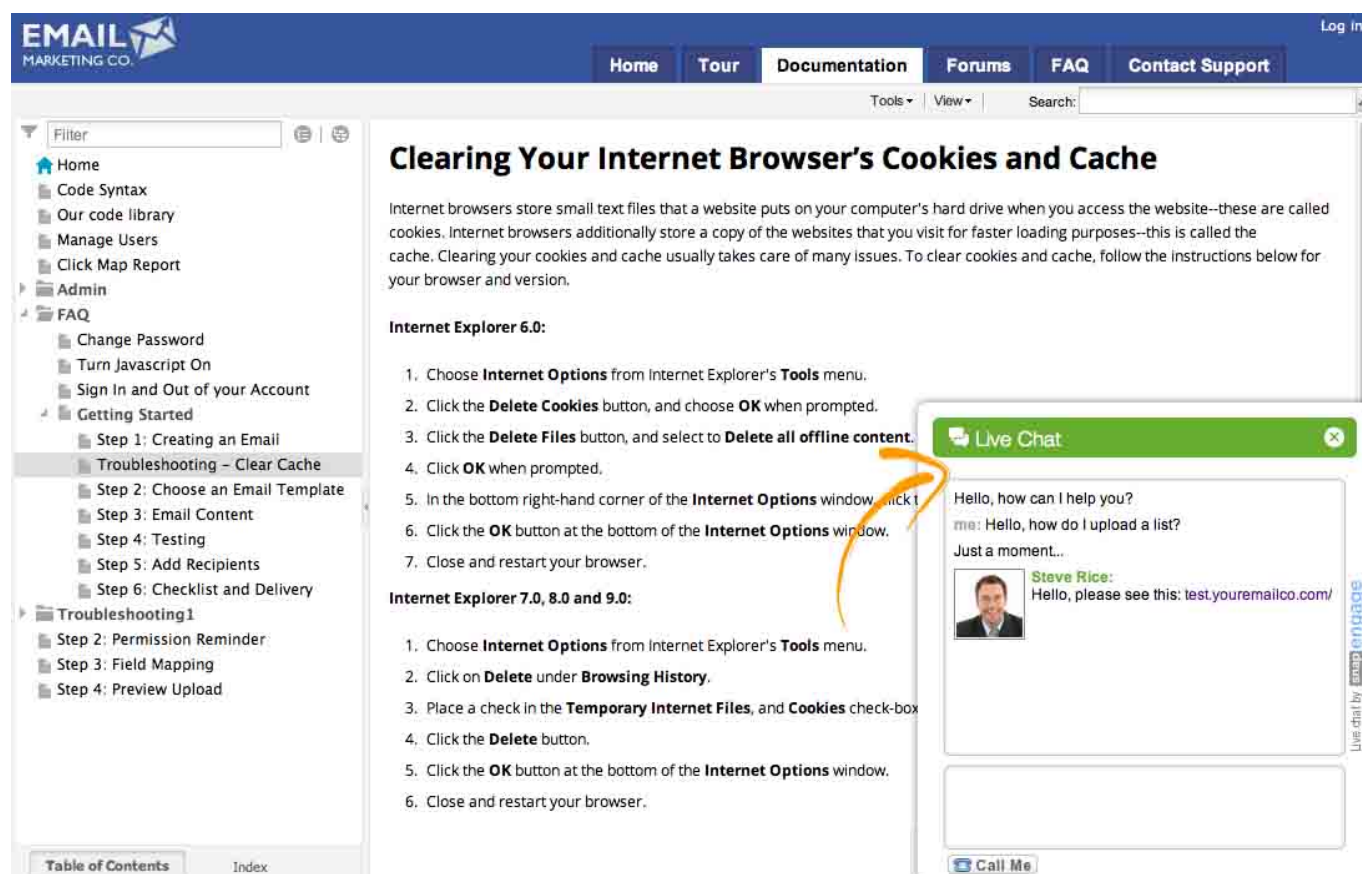
[SnapEngage](#)

[ProProfs Chat](#)

# SnapEngage Chat Integration With ProProfs Knowledge Base

## How does this integration help me?

You can add the SnapEngage chat box directly on your ProProfs site. You can place the chatbox anywhere on your knowledgebase - floating, at the window's edge, or inline on the page. This empowers you and your team to connect with visitors and answer their questions in real-time.



## Monitor knowledgebase visitors

The chat window stays up and in synch as your visitor browses through the pages of your help site. This helps you get all kinds of information about your visitor such as their geolocation, IP address, time they spent on a page and more.

## Engage customer proactively

SnapEngage automatically invites your knowledgebase visitors to chat as they are exploring your software documentation. This help you engage customers, while never missing out on a sales opportunity.

## Capture feedback and grow leads

The chat box works as a feedback form and help your collect new leads in the knowledgebase. Even when your support staff is offline, you can capture details of visitors and their feedback, and access it all from your chat dashboard.

### How do I set it up?

- [Setting Up SnapEngage](#)
- [Installing SnapEngage in ProProfs](#)
- [Removing SnapEngage](#)

---

## Setting Up SnapEngage

- Log in to SnapEngage and go into your **Configurator**. The code should be the first thing you see. If not, click Get the code, on the Settings page on the left sidebar.

```
<!-- begin SnapEngage code -->
<script type="text/javascript">
(function() {
  var se = document.createElement("script"); se.type = "text/javascript"; se.async = true;
  se.src = "//commondatastorage.googleapis.com/code.snapengage.com/js/57237552-b102-4f76-903d-6d5a475be5ba.js";
  var s = document.getElementsByTagName("script")[0]; s.parentNode.insertBefore(se, s);
})();
</script>
<!-- end SnapEngage code -->
```

[Click to show advanced code](#)

[Copy to Clipboard](#) [Email to Developer](#)

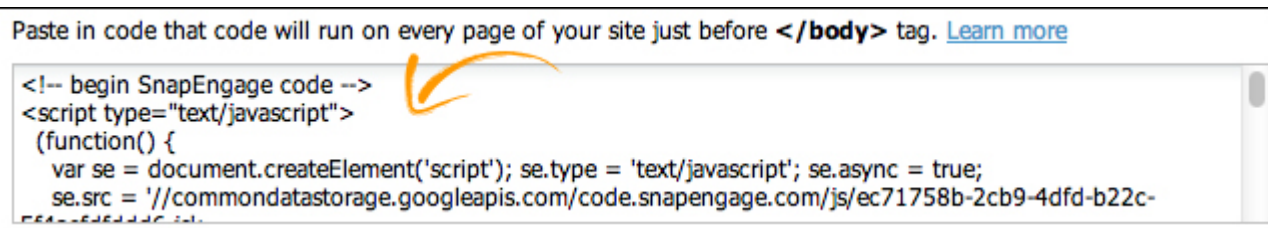
*Copy this code*

- Copy the Code Snippet using the blue button.

## Installing SnapEngage in ProProfs

The next step is to install SnapEngage in ProProfs.

1. Log in to your account (as an administrator), and click Settings > **Add, Edit, Customize Sites**.
2. Select the site you want to install it for.
3. Click the **Integrations** tab.
4. Locate the section where you put code that runs before `</body>` and paste in the code.



5. Click **Save**.
6. Once you install SnapEngage, you never have to add the code to ProProfs again. All changes you make inside of SnapEngage will instantly update your chat configuration.
7. To test, log in to your SnapEngage account and enable chat. Then log out of ProProfs and go to your site's home page. A chat window should appear.

Chat will ONLY run for logged-out users. Logged-in users will not see the chat option.

## Removing SnapEngage

If you have SnapEngage enabled, you can remove it at any time by doing the following:

1. Log in to your account (as an administrator), and click **Settings > Add, Edit, Customize Sites**.
2. Select the site you want to remove it from.
3. Click on the **Integrations** tab.
4. Locate the SnapEngage code and delete all of it.
5. Click **Save**.

### Related Articles:

LiveChat

## TidioChat

[ProProfs Chat](#)



# Wufoo Forms Integration With ProProfs Knowledge Base

## How does this integration help me?

You can add Wufoo web forms to any page in your ProProfs help site. This makes it incredibly easy to create web forms such as contact us, surveys, bug reports, feature requests, support tickets, and much more. You can also manage the backend and scripts needed to make collecting and understanding your data easy, fast, and fun.

[Check-out this example of an embedded customer satisfaction form](#)

The screenshot displays the Wufoo Forms web interface. At the top is a navigation bar with links for Forms, Reports, Themes, Users, Account, Help, and Logout. Below this is a sub-navigation bar with 'Add a Field', 'Field Settings', and 'Form Settings'. The main area is split into two panels. The left panel, titled 'Click or Drag to Add a Field', contains two sections: 'Standard' with fields like Single Line Text, Number, Paragraph Text, Multiple Choice, Drop Down, Section Break, and Page Break; and 'Fancy Pants' with fields like Name, File Upload, Address, Date, Email, Time, Phone, Web Site, Price, and Likert. The 'Checkboxes' field is highlighted with a green border and a mouse cursor. The right panel shows a form titled 'Workshop Registration' with the subtitle 'Register now while seats are available!'. The form includes fields for Name (Title, First, Last, Suffix), Address (Street Address, Address Line 2, City, State / Province / Region, Postal / Zip Code, Country), Email, Phone Number, and Badge Upgrade. At the bottom of the form is a 'Lunch' section. A yellow bar at the very bottom contains 'Save Form' and 'Add Field' buttons.

## Capture customer feedback

With an embedded Wufoo form in your knowledge base you can easily capture customer feedback and measure their satisfaction with the quality of your products, services, and documentation.

## Grow your sales leads

You can embed all kinds of forms including a sales lead form into your ProProfs site. This helps you collect details of prospective customers who are browsing the online documentation and evaluating your company.

### How do I set it up?

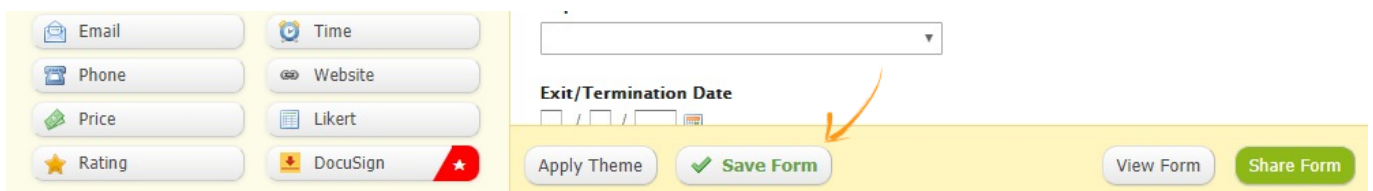
- [Setting up Wufoo](#)
- [Adding a Form to ProProfs](#)
- [Example of a Wufoo Form](#)

---

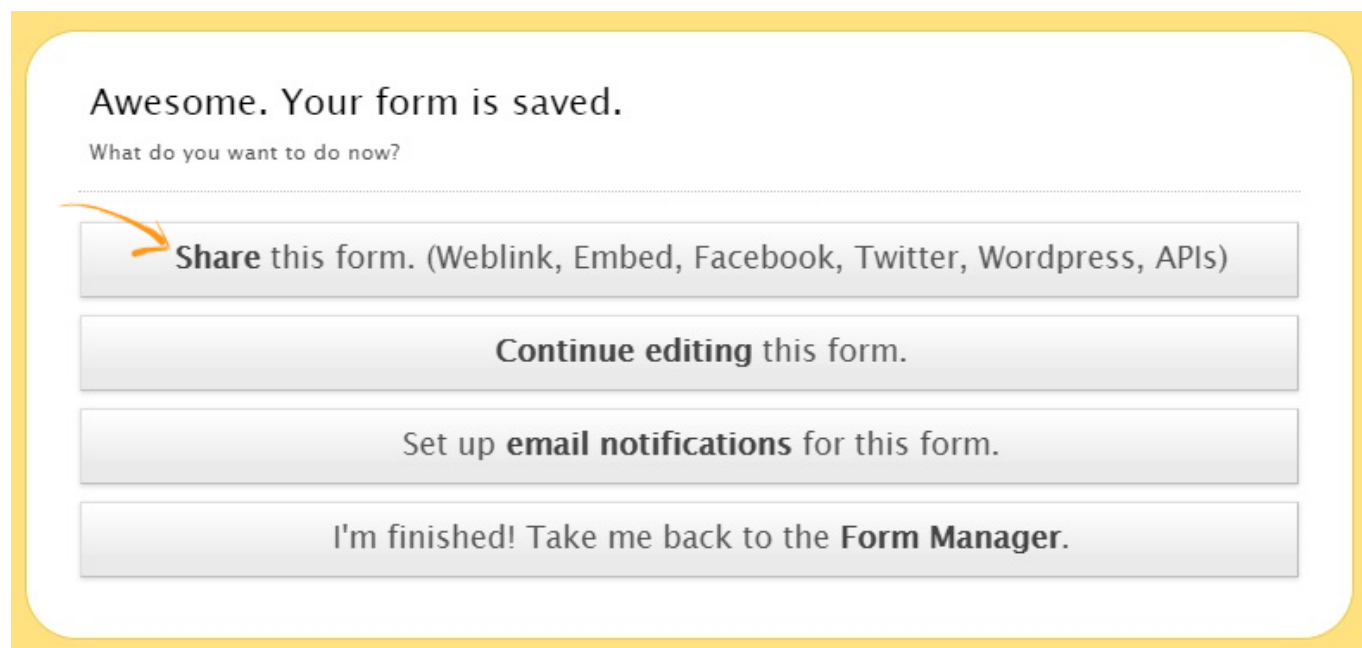
## Setting up Wufoo

**Step 1.** Create the form that you want to use. If you don't want to [create one from scratch](#), choose from more than 80 templates in their [Form Gallery](#).

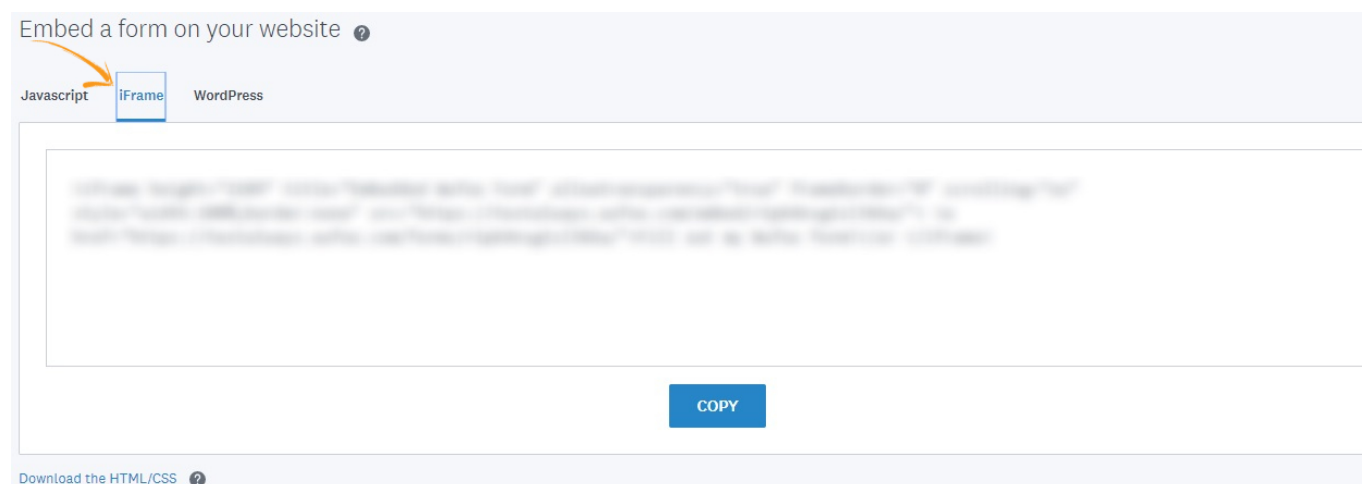
**Step 2.** Fill the required information and save the form by clicking **Save Form**.



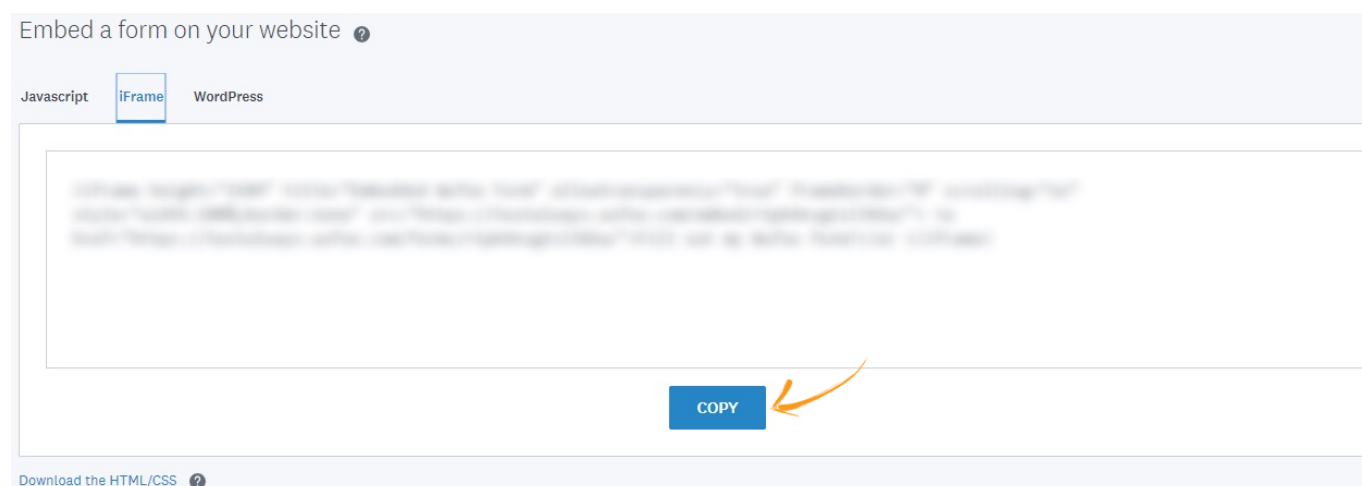
**Step 3.** On the next window, click the option **Share this form (Weblink, Embed, Facebook, Twitter, Wordpress, APIs)**.



**Step 4.** Scroll down to the section **Embed a form on your website** and go to the tab **iFrame**.



**Step 5.** Click **Copy** to copy the iFrame code.

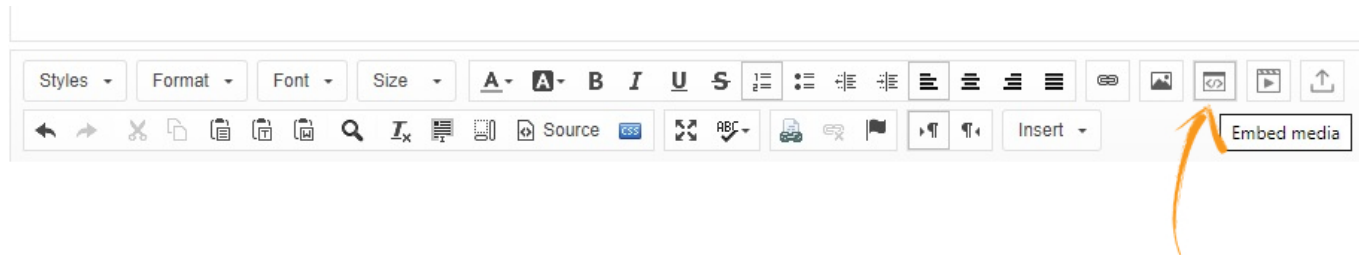


## Adding a Form to ProProfs

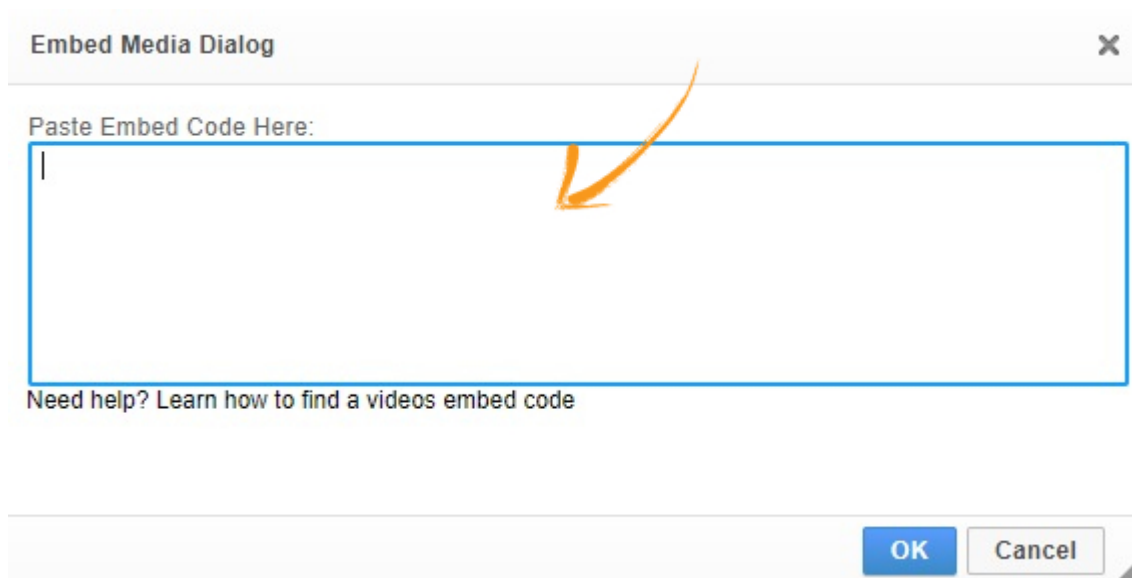
**Step 1.** Log in to your account.

**Step 2.** Create a [new page](#), or [edit an existing page](#) you wish to add the Wufoo form to.

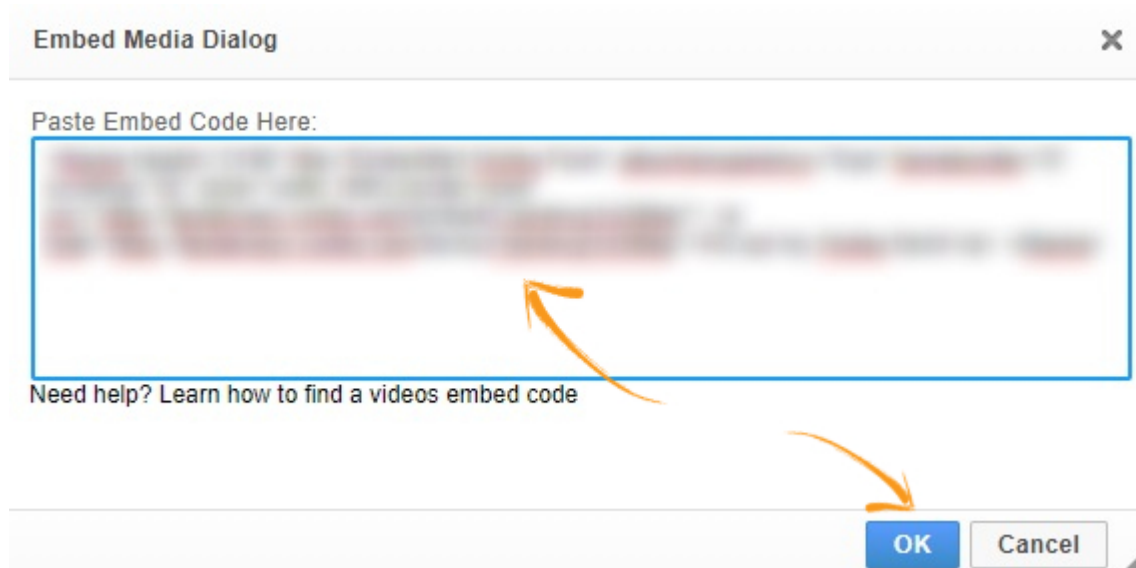
**Step 3.** On the editor toolbar, click **Embed media**.



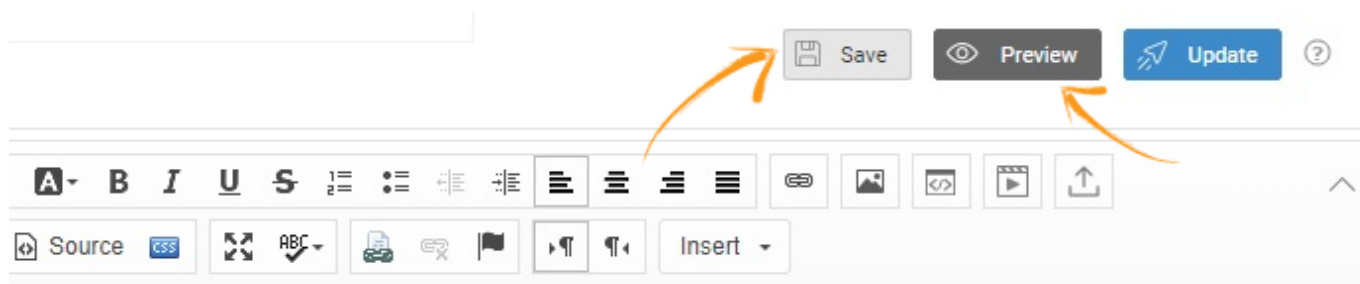
**Step 4.** Paste the iFrame code, you copied from Wufoo earlier, in the text box. Click **OK** when you're done.



**Step 5.** Once you've pasted the iFrame code, click **OK**.

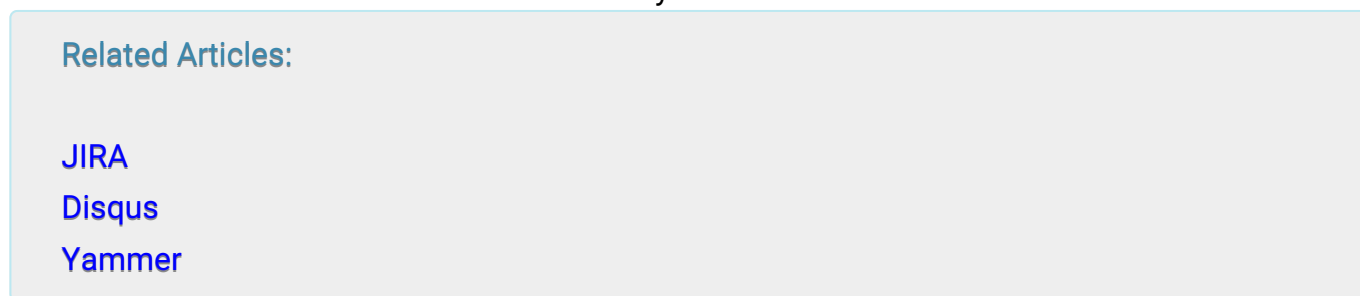


**Step 6.** Click **Save** and preview the new changes by clicking on the **Preview** button.



### Example of a Wufoo form

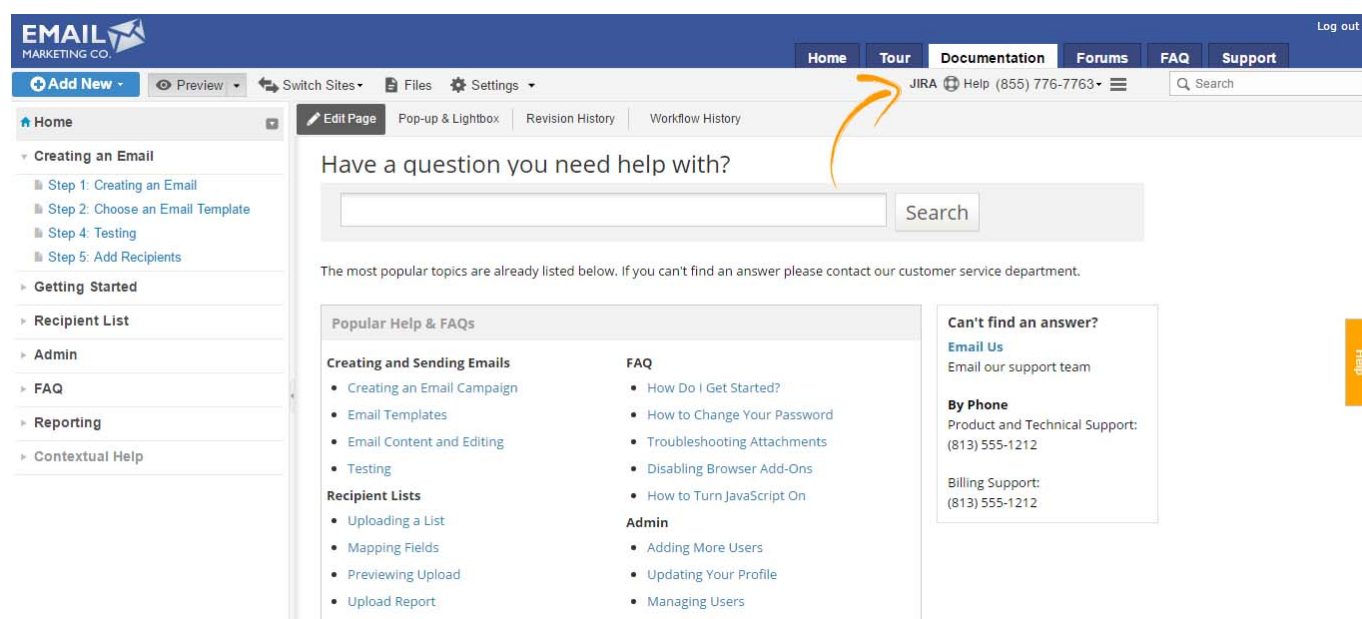
Fill out my Wufoo form!



# JIRA integration With ProProfs Knowledge Base

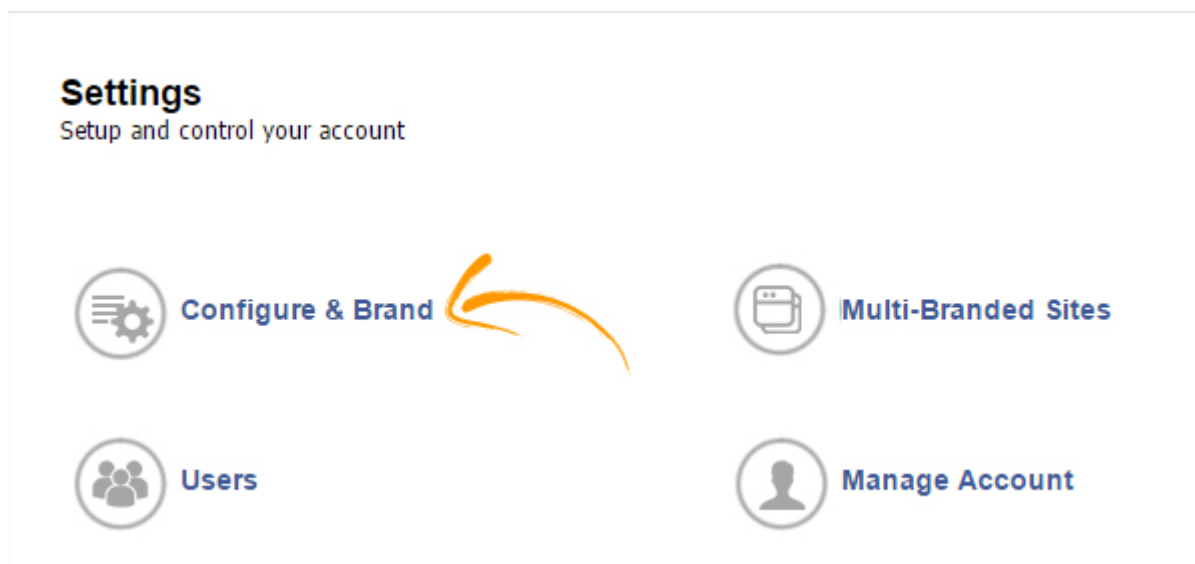
## How does this integration help me?

You can report issues in Jira directly from your knowledge base. This helps you create and assign new Jira tasks by simply filling a form and as the ticket is automatically sent to your Jira account.

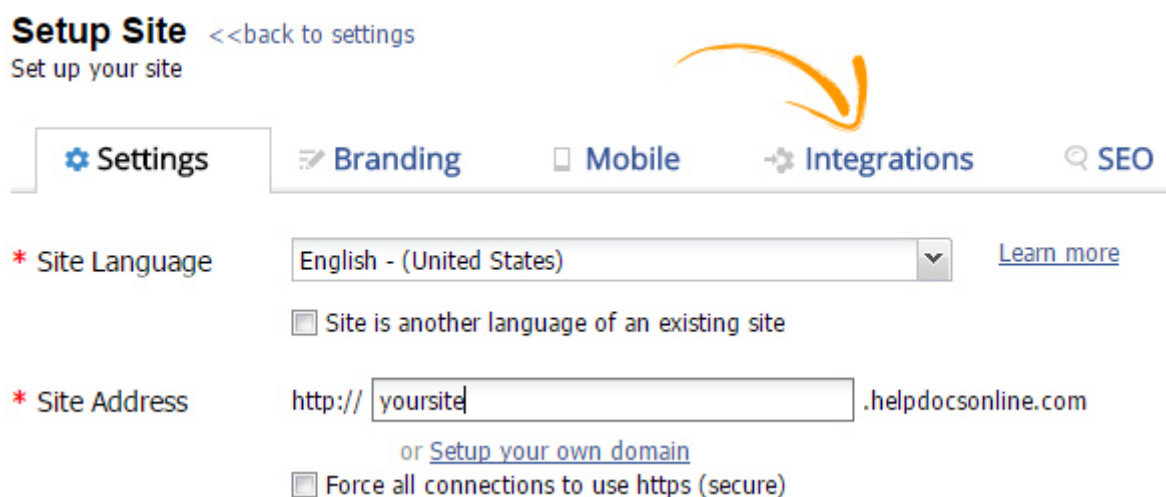


## How do I set it up?

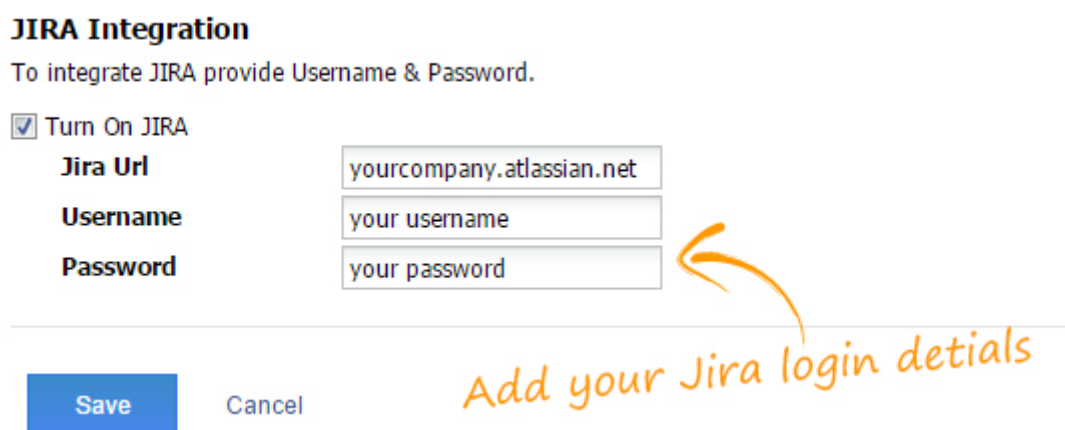
**Step 1.** Go to "Settings" and click on "Configure & Brand".



**Step 2.** Select the "Integrations" tab.



**Step 3.** Add your Jira URL, username, password and click on "Save" to activate the integration.



Once you're done with the above steps, a Jira icon will appear in you knowledge base, as shown in the image below:



You can raise an issue, at anytime, by clicking on the Jira icon and filling the details.

A screenshot of the 'Create a JIRA issue' form. The form has a light blue border and a white background. It contains the following fields: 'Project' (dropdown), 'Issue Type' (dropdown), 'Summary' (text input), 'Description' (text input), 'Assignee' (text input), and 'Priority' (dropdown). At the bottom are 'Submit' and 'Close' buttons. An orange arrow points from the handwritten text 'Raise an issue in Jira automatically' to the 'Issue Type' dropdown.

#### Related Articles:

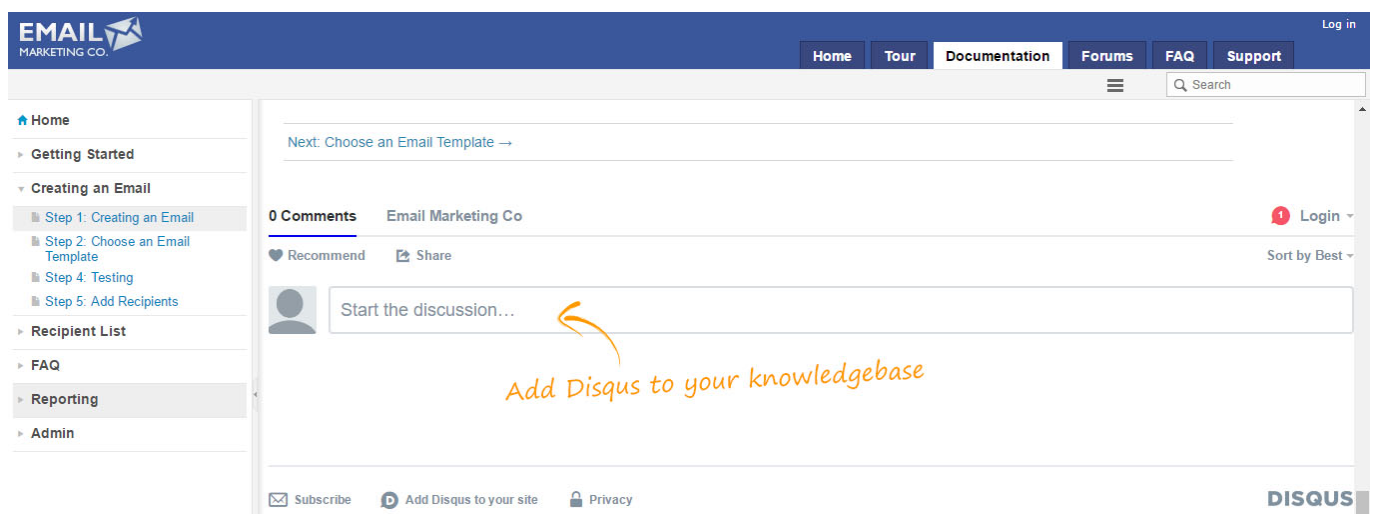
[Wufoo](#)  
[Disqus](#)  
[Yammer](#)



# Disqus Integration with ProProfs Knowledge Base

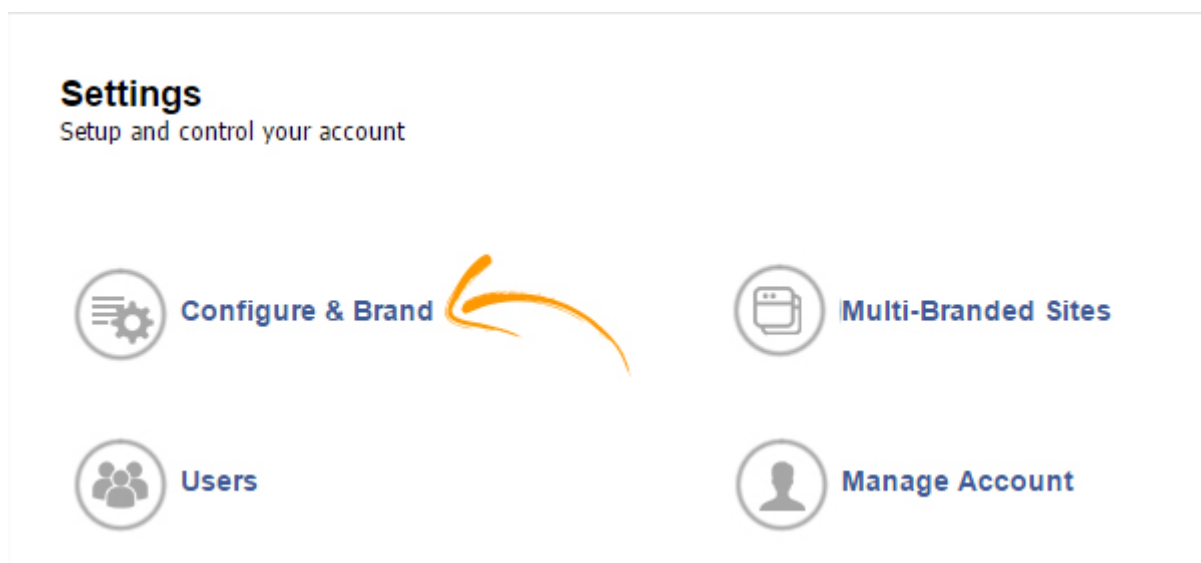
## How does this integration help me?

You can easily add Disqus as an add-on tool to your knowledge base to power discussions and engagement among your users.



## How do I set it up?

**Step 1.** Go to Settings and click on Configure & Brand.



**Step 2.** Select Integrations from the menu bar.

**Setup Site** <<back to settings  
Set up your site

Settings Branding Mobile Integrations SEO

\* Site Language English - (United States) [Learn more](#)  
☐ Site is another language of an existing site

\* Site Address http://yoursite.helpdocsonline.com  
or [Setup your own domain](#)  
☐ Force all connections to use https (secure)

**Step 4.** Add the shortname of your Disqus site.

### Integrate Disqus

To integrate Disqus provide shortname.

emailmarketingco.disqus.com

### JIRA Integration

To integrate JIRA provide Username & Password.

☐ Turn On JIRA

Save

Cancel

Add the shortname  
of your Disqus site

You can find the shortname from the [Admin section](#) of your Disqus account.

DISQUS Email Marketing Co 3 total Start Community Settings

Your Sites 3 + New

Give your site an organization name >

Email Marketing Co

Copy your Disqus shortname

### Related Articles:

[Wufoo](#)

[ProProfs Chat](#)

[Yammer](#)

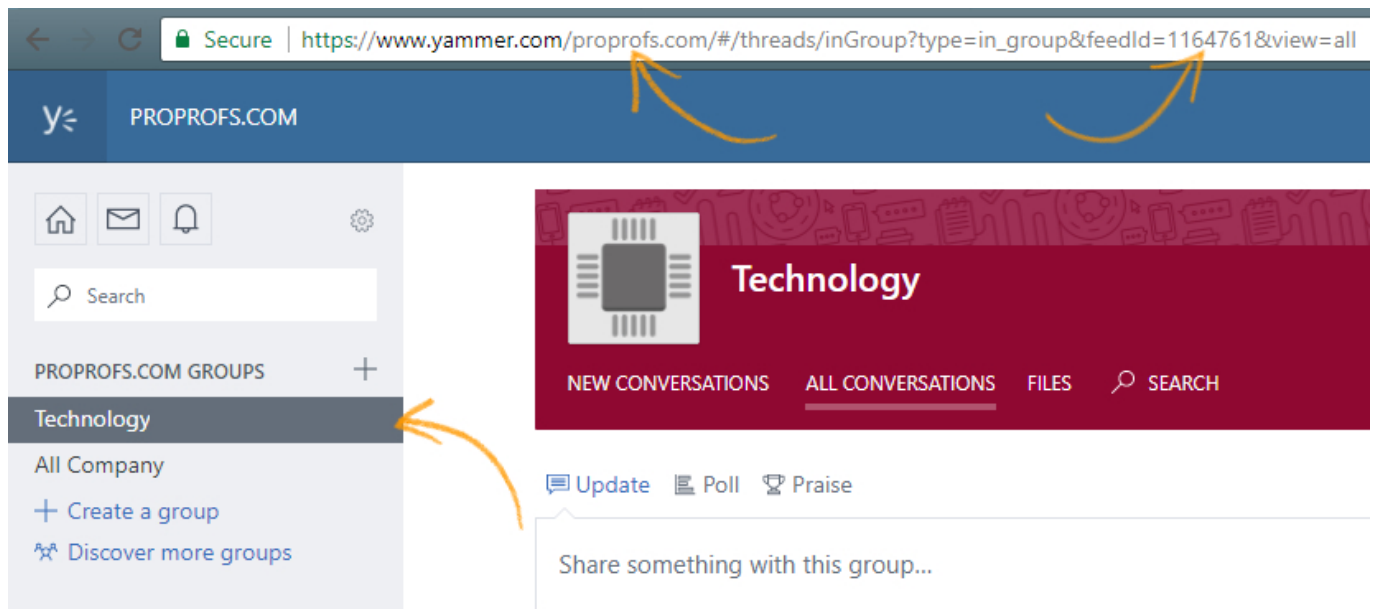
# Yammer Integration With ProProfs Knowledge Base

Yammer is a freemium enterprise social networking service used for private communication within organizations. Integrate your Knowledge-base with Yammer to establish a private internal communication channel with your employees and users.

## Yammer account details

To integrate Yammer with your Knowledgebase, you will need your 'network name' and 'feed-Id,' here's how you can get the required information from your Yammer account:

Log in to your Yammer account, and open your group. In the address bar of the window, you can find your 'network name' and 'feed-Id.'

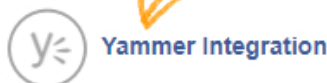
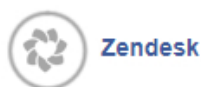


## Integration

Here's how to integrate Yammer to your Knowledgebase:

**Step 1:** Log in to your account as an administrator, go to "Settings" and click "Integrations," locate and click "Yammer Integration."

## Integrations [← back to settings](#)



**Step 2:** Enter the 'network name' and 'feed-id.' Click "Save" to complete the integration.

### Yammer Integration [← back to settings](#)

Connect with Yammer

Network Name:

Feed Id:

[Save](#)

## Snippet

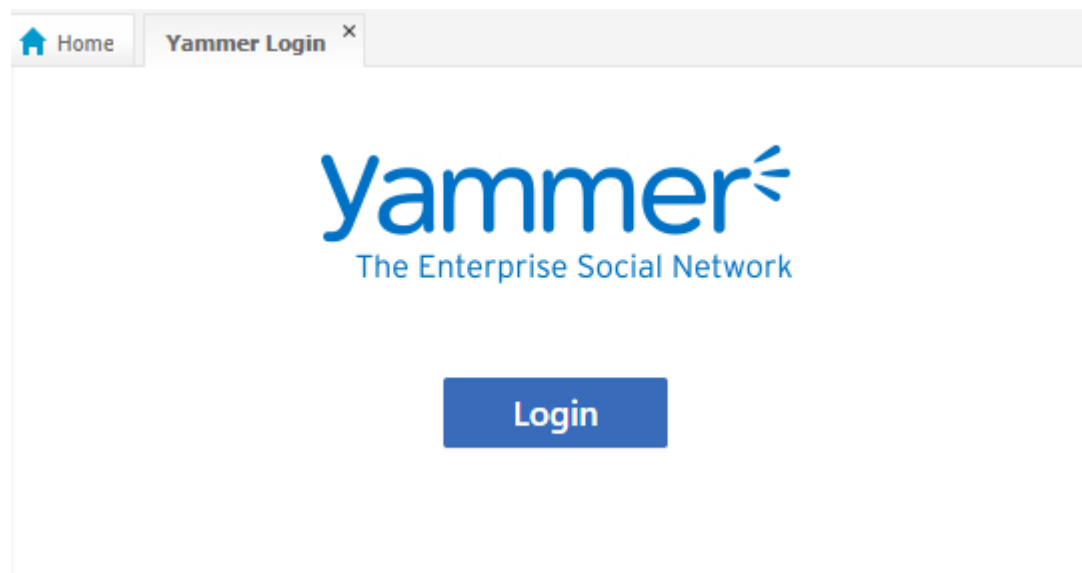
You can include a snippet button in your knowledge-base, here's how to incorporate a snippet to direct users to the Yammer login page:

Select a page to incorporate the snippet, click "Source" to enable source code editing. Add the following code extract in the source code, and save your changes. Update the page to apply changes.

Code extract- `<div id="yammer-feed" style="height:400px;width:500px;">&nbsp;</div>`

The screenshot shows the ProProfs editor interface. At the top, there's a header for 'Yammer Login' with a URL 'https://clarkbruce.helpdocsonline.com/' and a 'Status: Published' dropdown. Below the header is a toolbar with various editing options. The 'Source' button is highlighted with an orange arrow. Below the toolbar, the source code editor shows the snippet code: `<div id="yammer-feed" style="height:400px;width:500px;">&nbsp;</div>`.

Here's how the snippet will appear:



Related Articles:

[Wufoo](#)

[ProProfs Chat](#)

[JIRA](#)

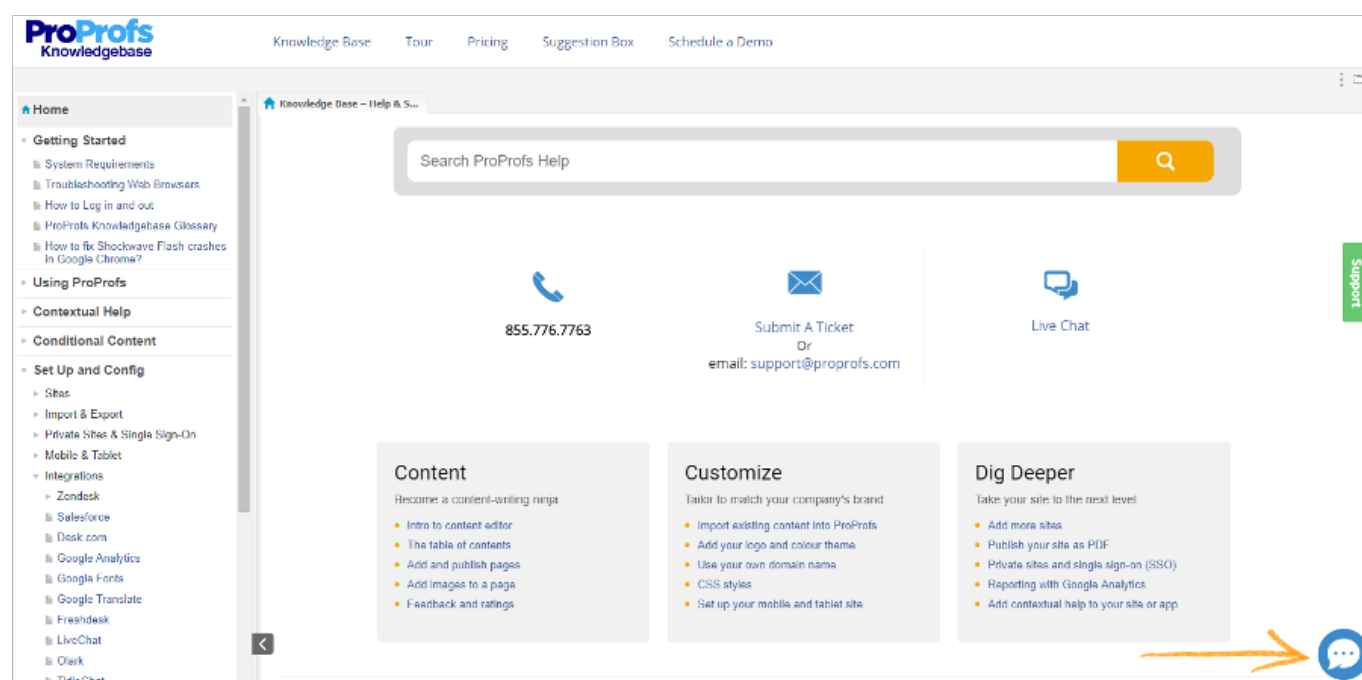
# ProProfs Live Chat Integration With ProProfs Knowledge Base

Install a live help chat software on your website to initiate conversations with visitors, capture potential leads with pre-chat forms, and close sales faster.

## Benefits of adding ProProfs Live Chat to your ProProfs Knowledge Base:

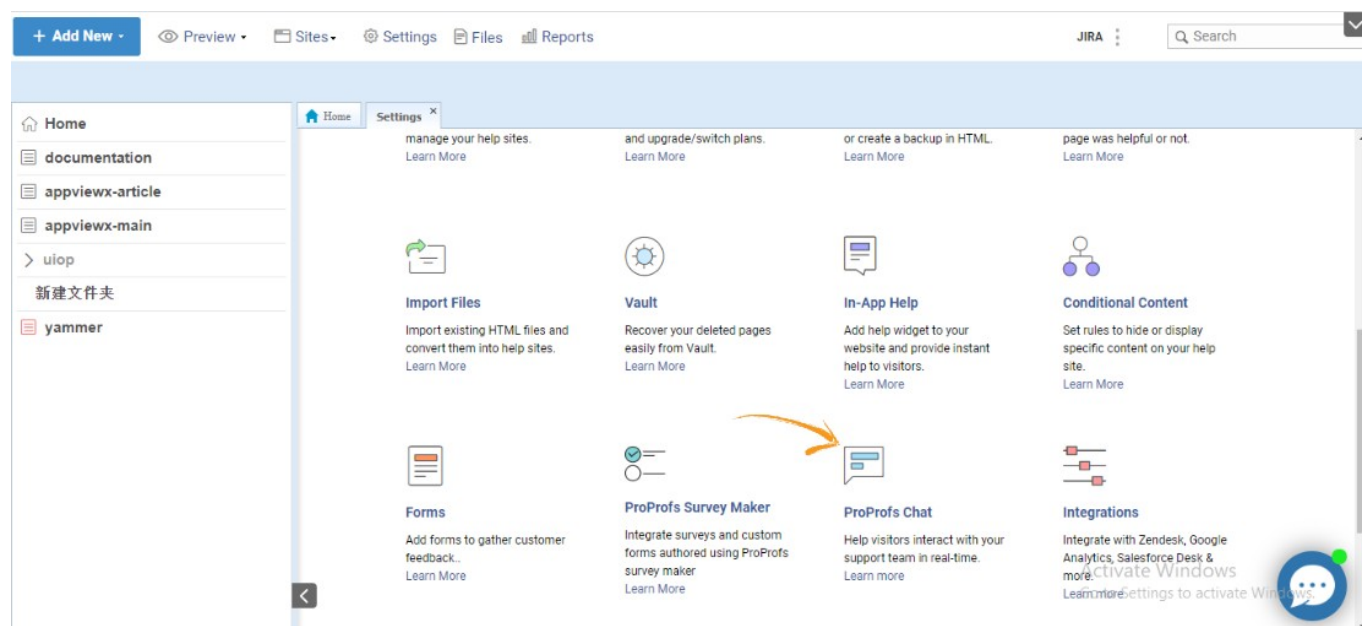
1. Reduce Tickets with 24\*7 support.
2. Monitor Knowledge Base visitors in real-time.
3. Capture feedback easily

## How will it look?

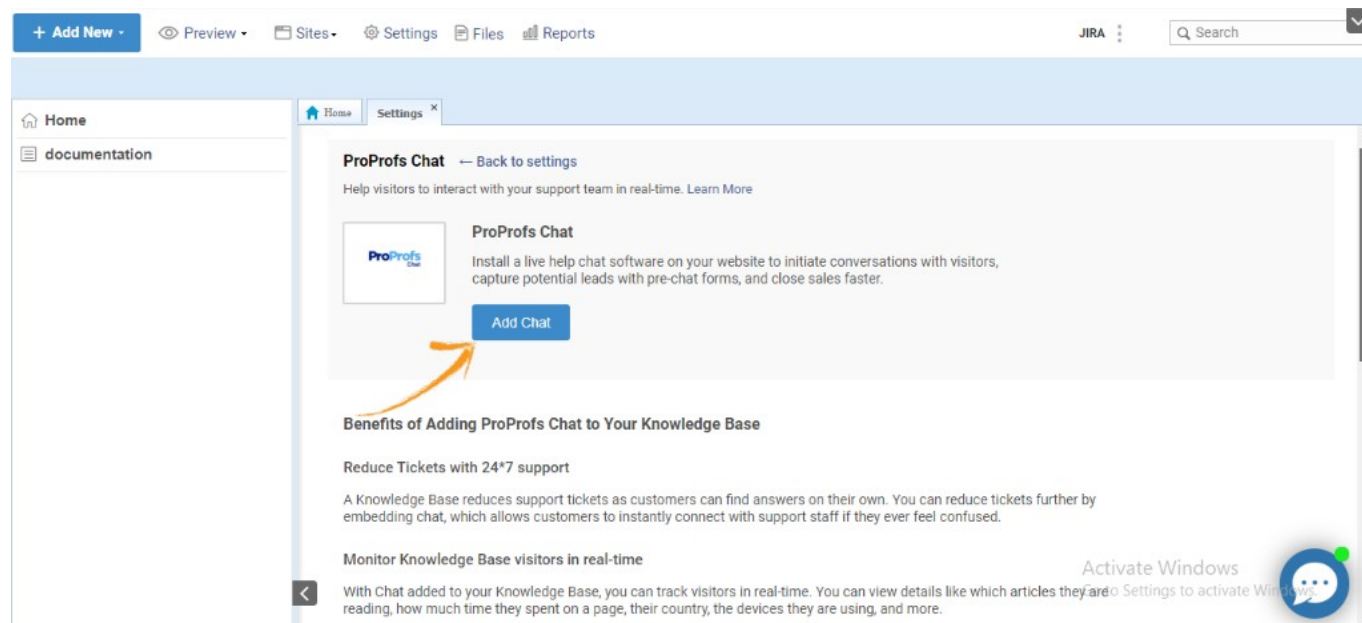


## Here's how you can add ProProfs Live Chat to Your ProProfs Knowledge Base:

Step 1: On your ProProfs Knowledge Base dashboard, navigate to **Settings >> ProProfs Chat**.

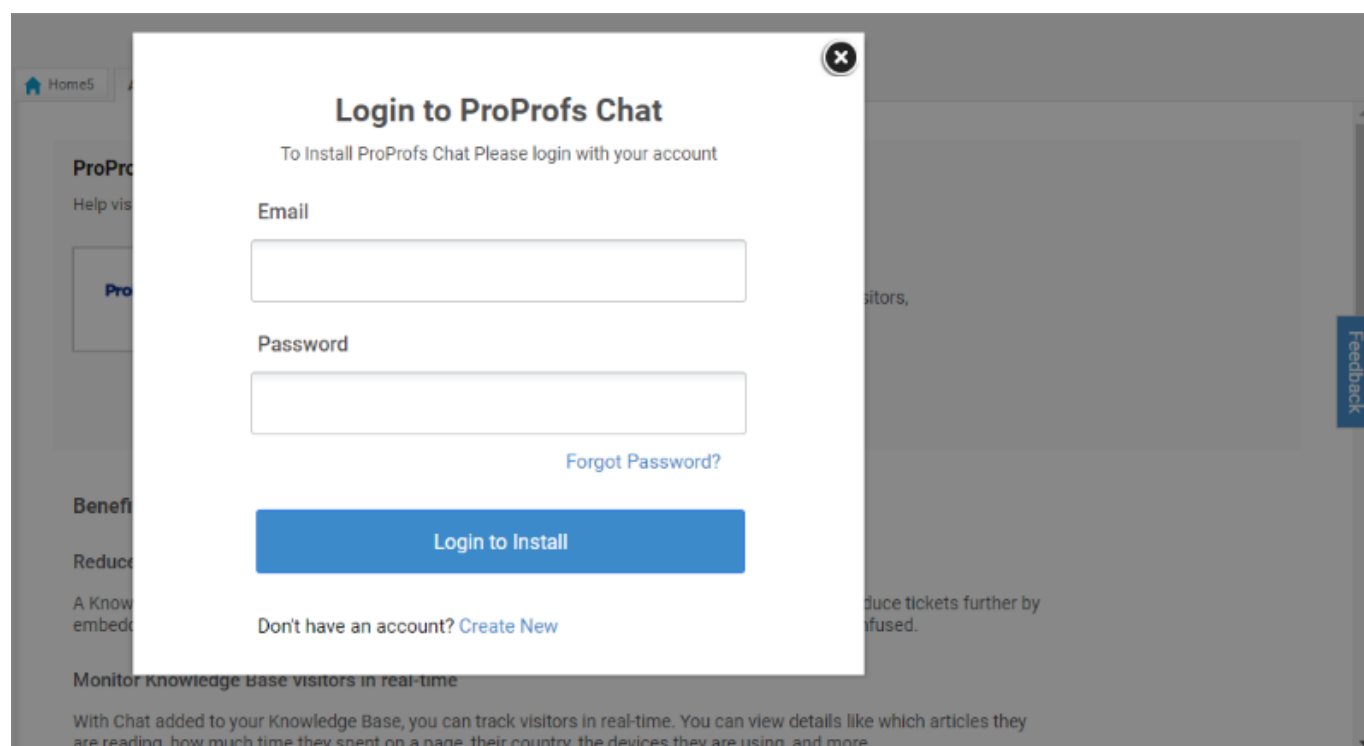


Step 2: Now click on **Add Chat** for adding Live Chat into your Knowledge Base.

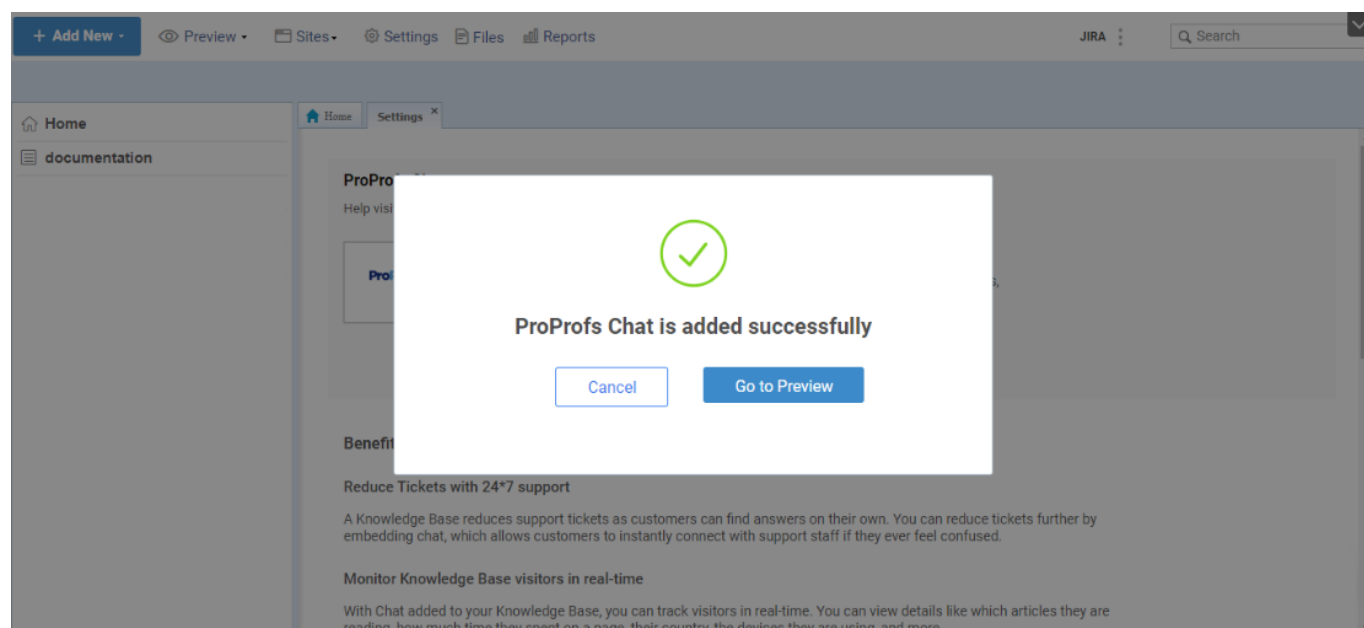


Step 3: Log into your ProProfs Chat account by providing **Email & Password**.



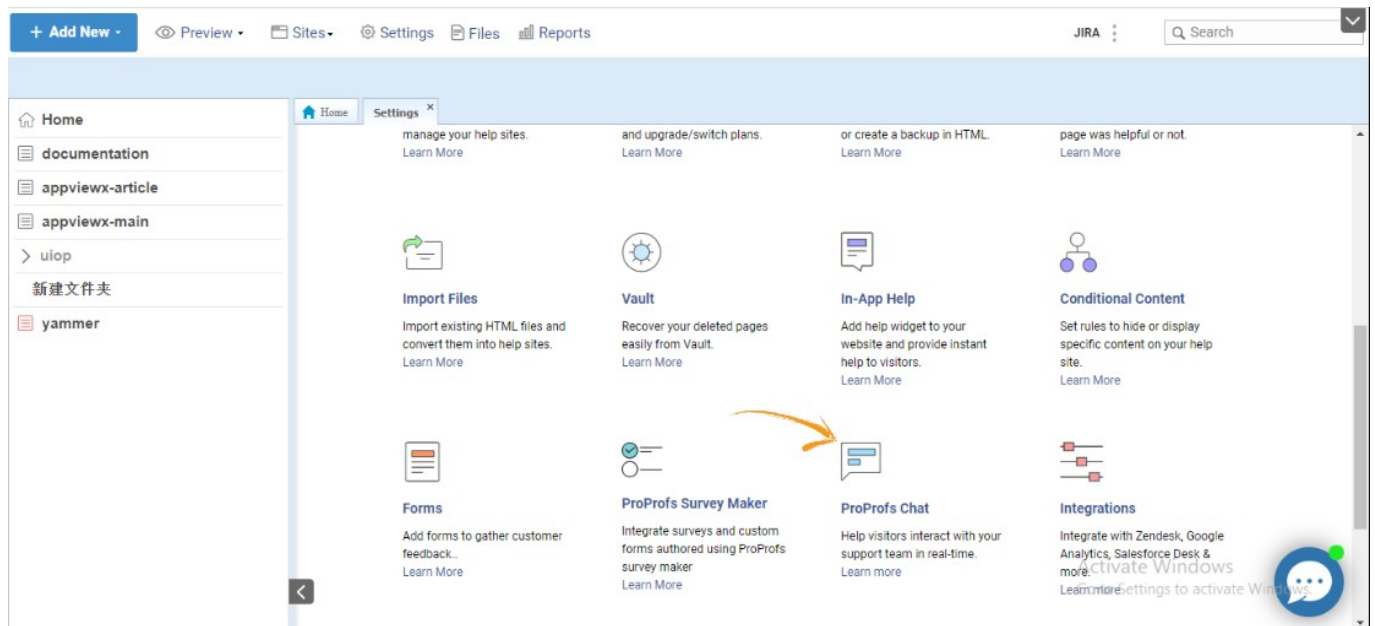


Now, ProProfs Chat has been added Successfully to Your Knowledge Base.

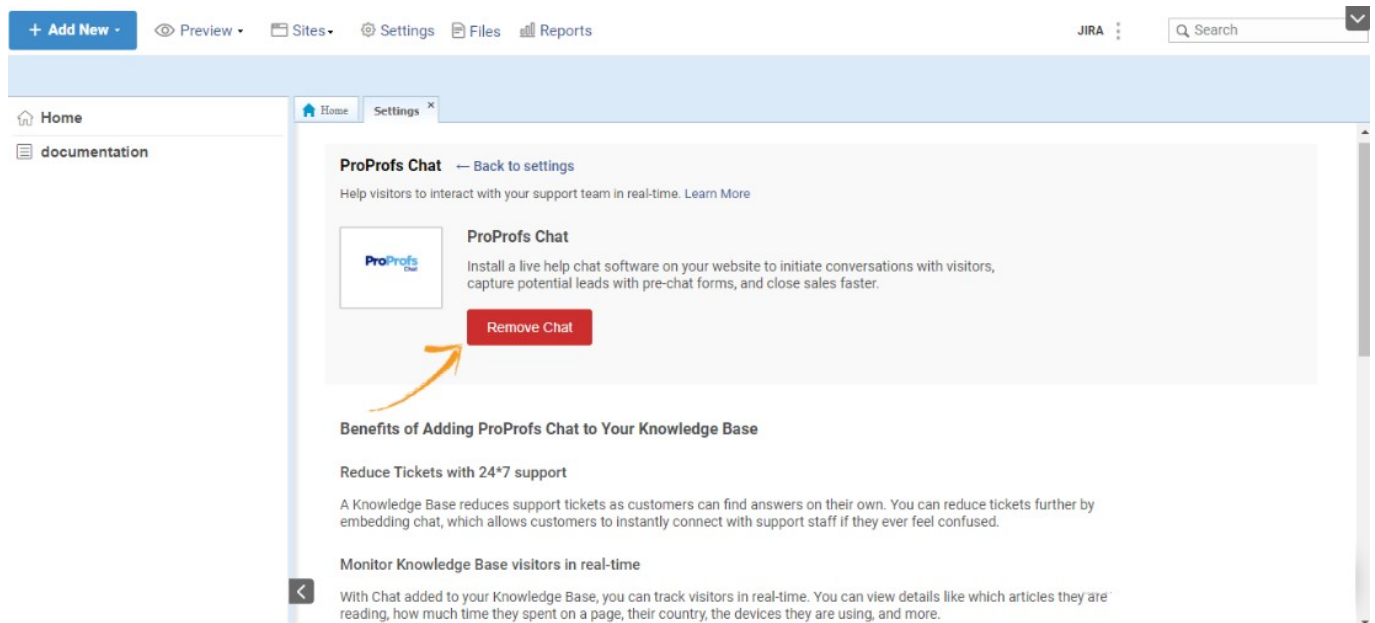


**If you want to remove ProProfs Chat, follow the below steps:**

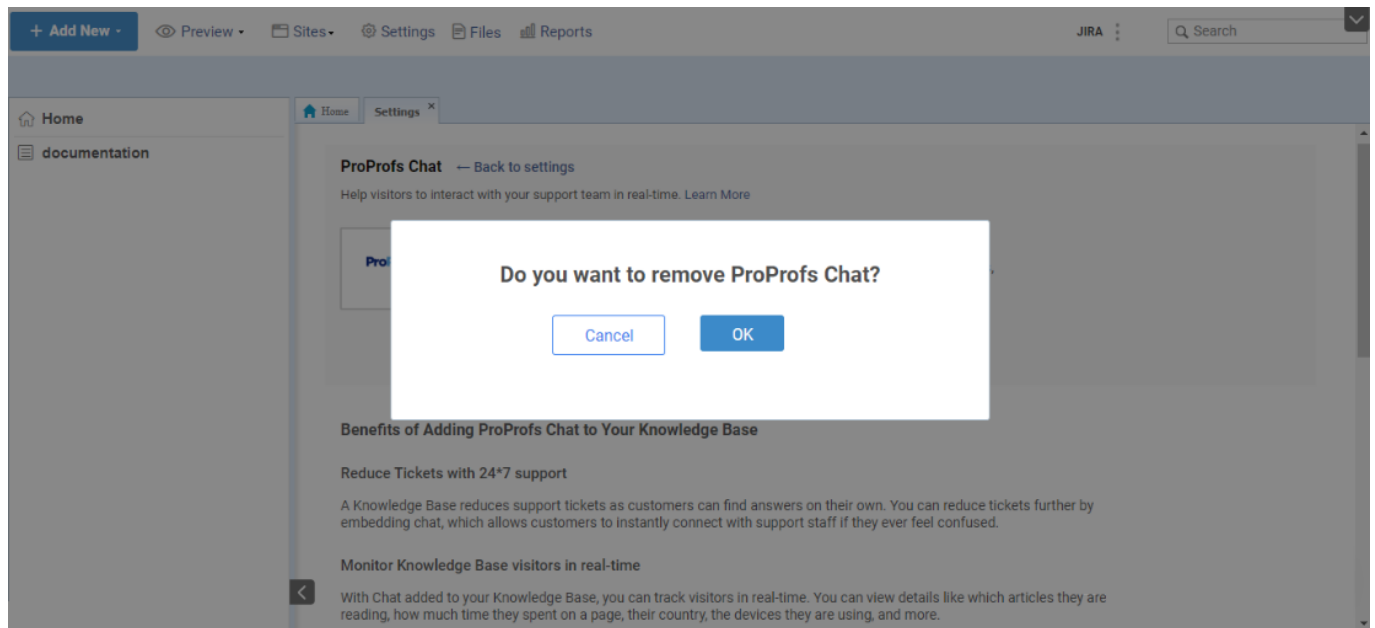
**Step 1:** From you Knowledge Base dashboard, navitage to **Settings >> ProProfs Chat**.



**Step 2:** Click on **Remove Chat**. The Chat will remove form your Knowledge Base help site.



**Step 3:** Click on **OK** and chat will rempve from your help site.



### Related Articles:

[LiveChat](#)

[Olark](#)

[SnapEngage](#)

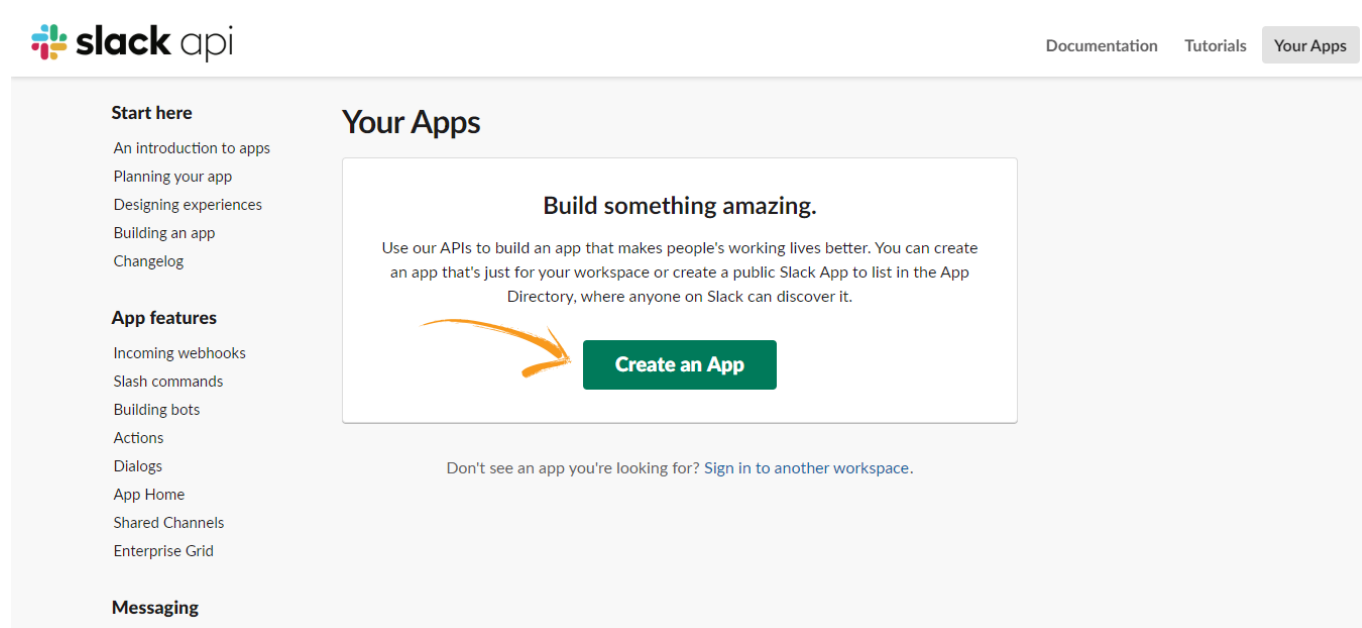
# How to Integrate Slack With ProProfs Knowledge Base

This integration equips your Slack users to get instant notifications every time someone makes a change in your knowledge base document. Every stakeholder gets real-time updates, which leads to clarity and seamless collaboration among teams.

Here are step-by-step instructions to integrate Slack with ProProfs Knowledge Base.

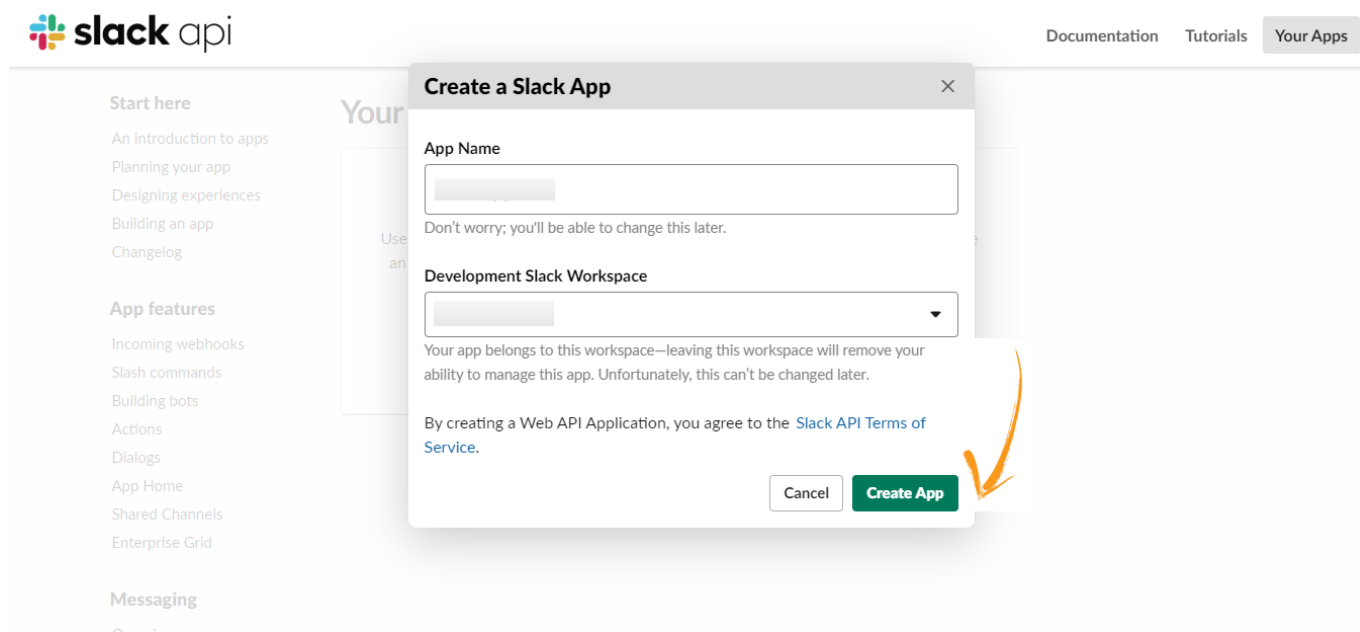
**Step 1.** Sign in to your Slack Account.

**Step 2.** Once you're logged in, visit <https://api.slack.com/apps> and click 'Create an App'.

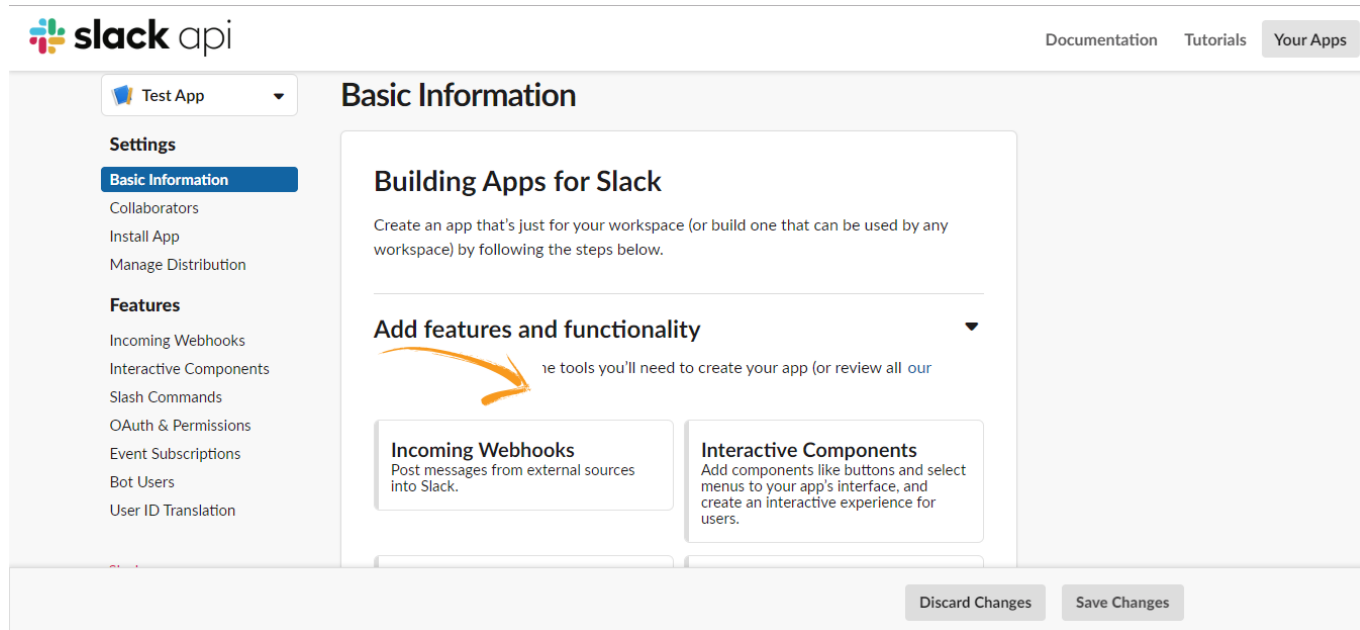


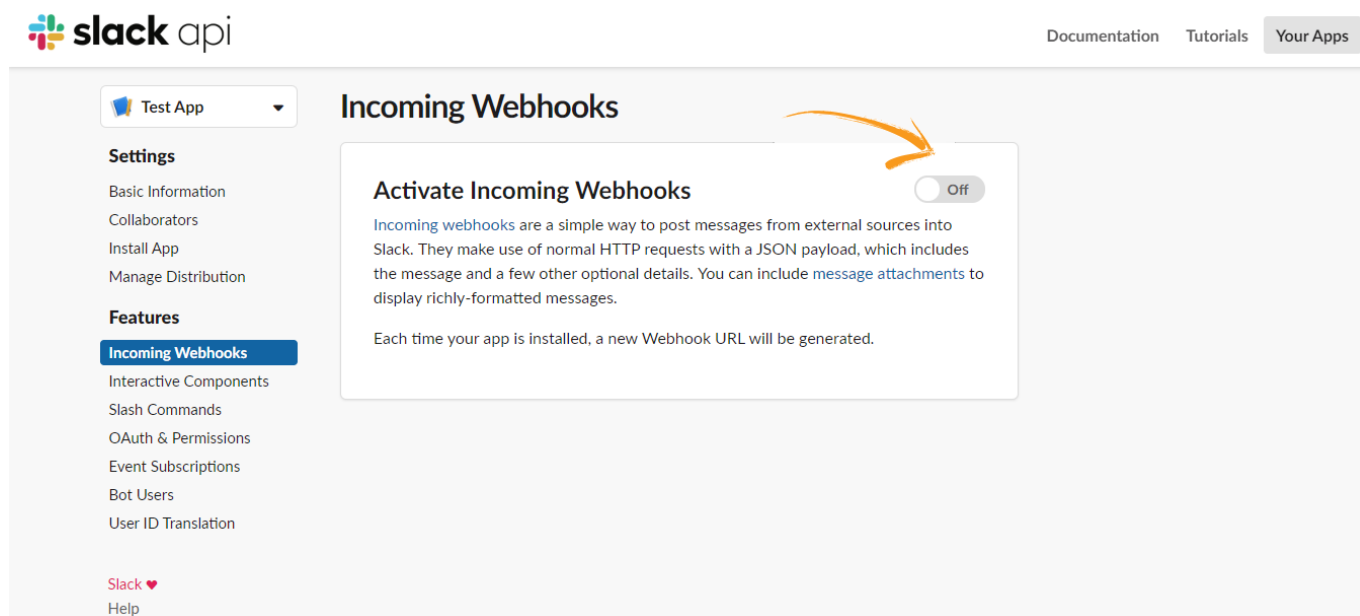
**Step 3.** Fill in the required details in the 'Create a Slack App' form, and then click 'Create App' button.

- App Name: This name will be used as the sender's name on the notification.
- Select your development slack workplace.



**Step 4.** Under Basic Information on the left pane, click on '**Incoming Webhooks**' and turn it **On**.





**Test App**

**Settings**

- Basic Information
- Collaborators
- Install App
- Manage Distribution

**Features**

- Incoming Webhooks**
- Interactive Components
- Slash Commands
- OAuth & Permissions
- Event Subscriptions
- Bot Users
- User ID Translation

Slack ♥  
Help

## Incoming Webhooks

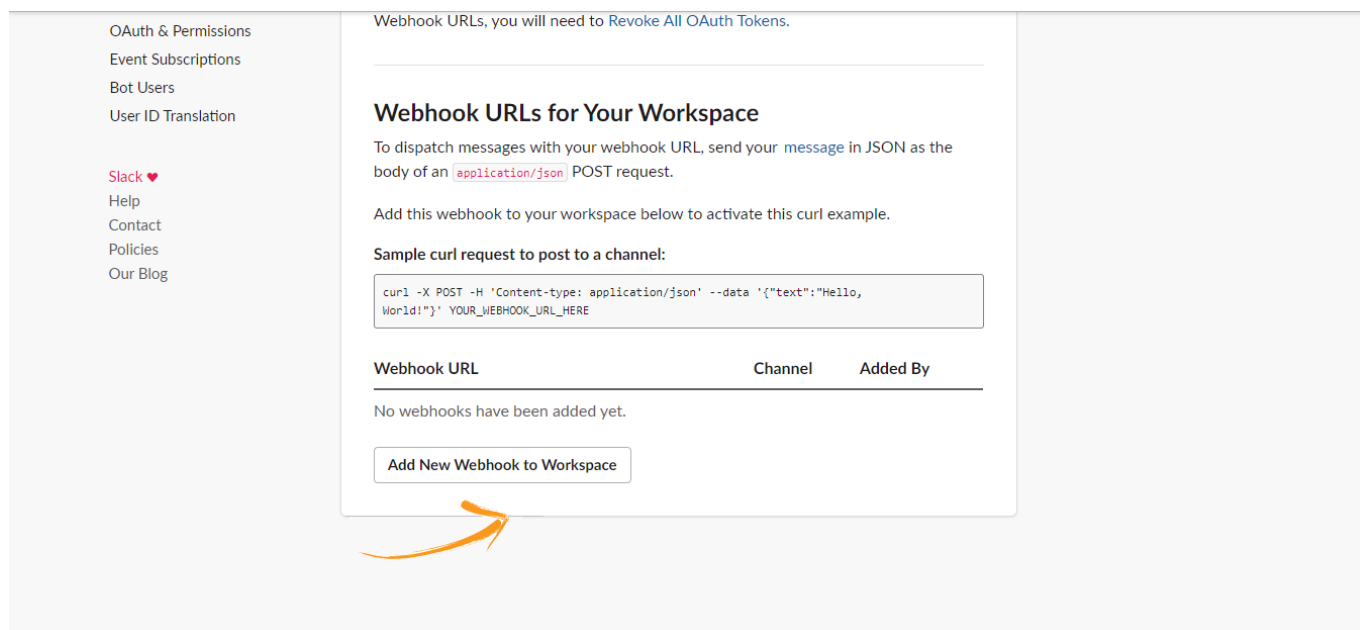
### Activate Incoming Webhooks

☐ Off

Incoming webhooks are a simple way to post messages from external sources into Slack. They make use of normal HTTP requests with a JSON payload, which includes the message and a few other optional details. You can include [message attachments](#) to display richly-formatted messages.

Each time your app is installed, a new Webhook URL will be generated.

**Step 5.** Scroll down and click on 'Add New Webhook to Workspace'.



OAuth & Permissions  
Event Subscriptions  
Bot Users  
User ID Translation

Slack ♥  
Help  
Contact  
Policies  
Our Blog

Webhook URLs, you will need to [Revoke All OAuth Tokens](#).

## Webhook URLs for Your Workspace

To dispatch messages with your webhook URL, send your [message](#) in JSON as the body of an `application/json` POST request.

Add this webhook to your workspace below to activate this curl example.

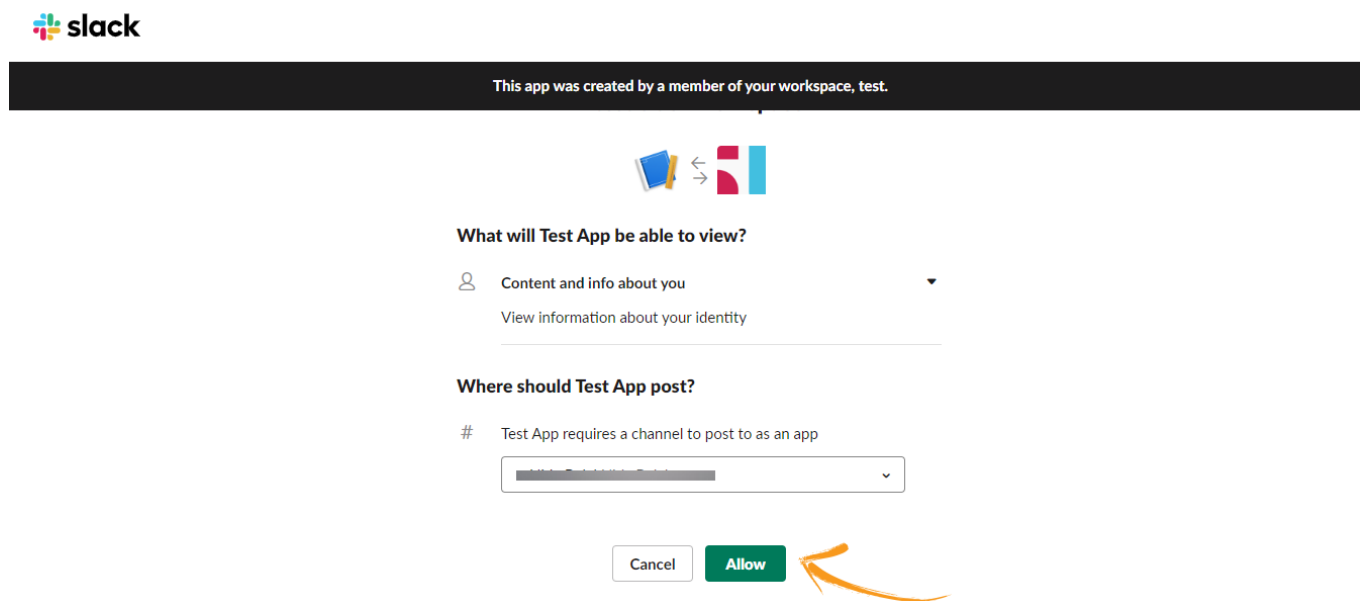
**Sample curl request to post to a channel:**

```
curl -X POST -H 'Content-type: application/json' --data '{"text":"Hello, World!"}' YOUR_WEBHOOK_URL_HERE
```

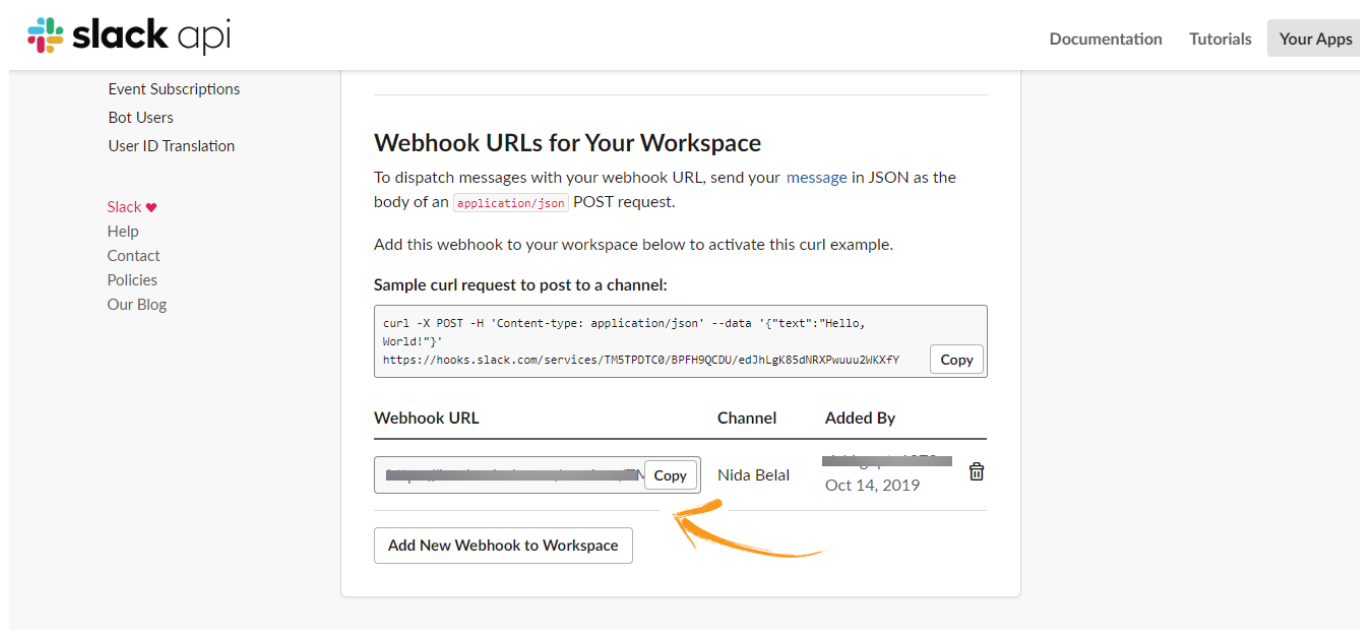
Webhook URL	Channel	Added By
No webhooks have been added yet.		

[Add New Webhook to Workspace](#)

**Step 6.** Now select a channel via which you want to send notifications and click on 'Allow'.

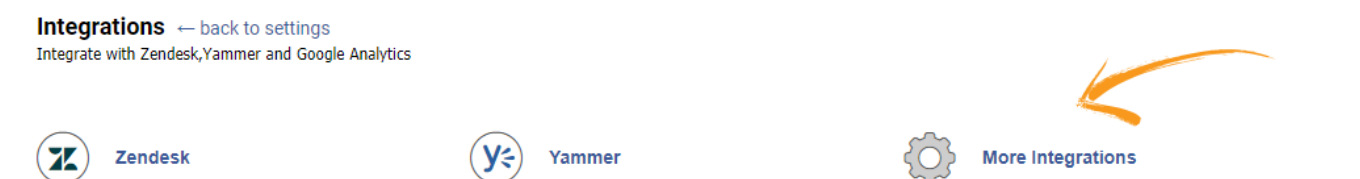


**Step 7.** Scroll down to see the new webhook URL. Copy the URL and paste it into a notepad as you'll need it in a short while.



**Step 8.** Now, login to your ProProfs Knowledge Base and select the Help site in which you want to integrate Slack.

**Step 9.** Go to '**Settings**', select '**Integrations**' and then click on '**More Integrations**'.



**Step 10.** Scroll down to find '**Integrate Slack**' and copy the Webhook URL in the field '**Integrate Slack**'.

#### Google Analytics

To run Google Analytics for this site, paste in your Tracking ID. [Learn more](#)

UA-250464-6

format of UA-#####-#.

#### LiveChat

To run LiveChat for this site, put your email.

#### Integrate Disqus

To integrate Disqus provide shortname.

#### JIRA Integration

To integrate JIRA provide Username & Password.

☐ Turn On JIRA

#### Integrate Slack

To integrate Slack please provide Slack Webhook URL.

Save

Cancel

**Step 11.** Click '**Save**' to finish the integration process.

#### Related Articles:

[How to Integrate JIRA with ProProfs Knowledge Base](#)

[How to Integrate Disqus with ProProfs Knowledge Base](#)

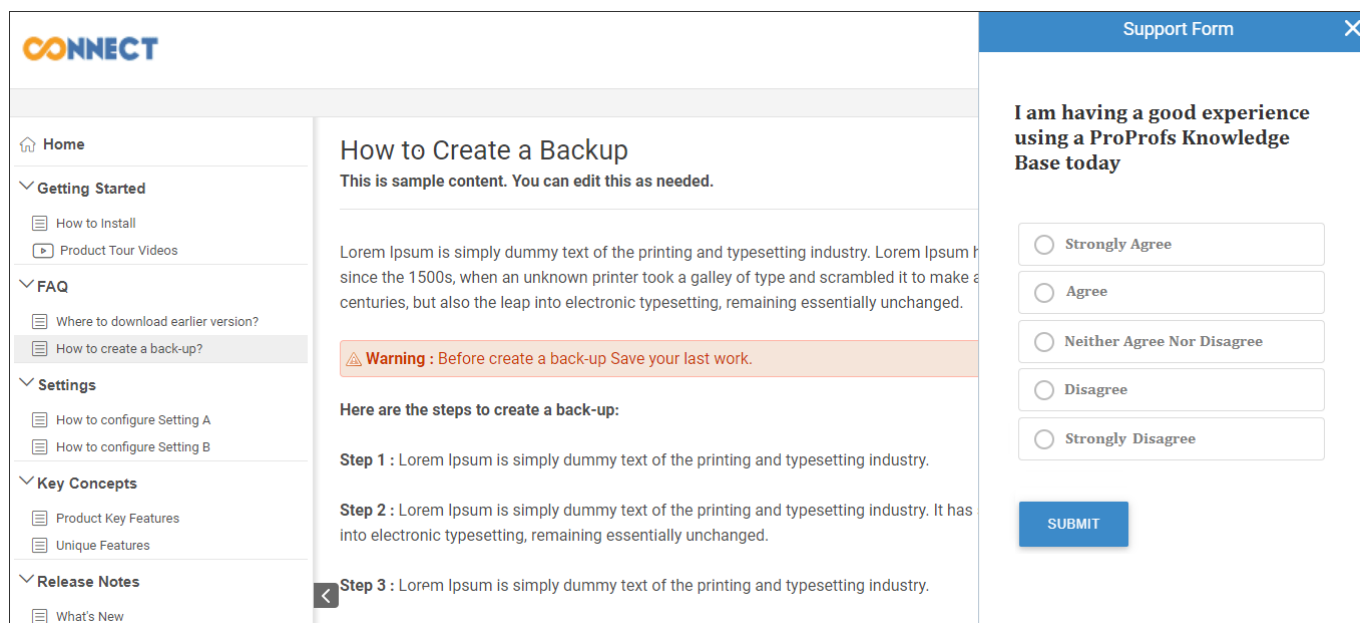
[How to Integrate Yammer with ProProfs Knowledge Base](#)



# How to Add ProProfs Survey Maker Form in ProProfs Knowledge Base

ProProfs Knowledge Base allows you to integrate with ProProfs Survey Maker. You can use this integration to get feedback from visitors landing on your Knowledge Base. After you have completed this integration, your visitors will see a **Support** icon on the right of the screen. When a visitor clicks it, a survey of your choice will pop up.

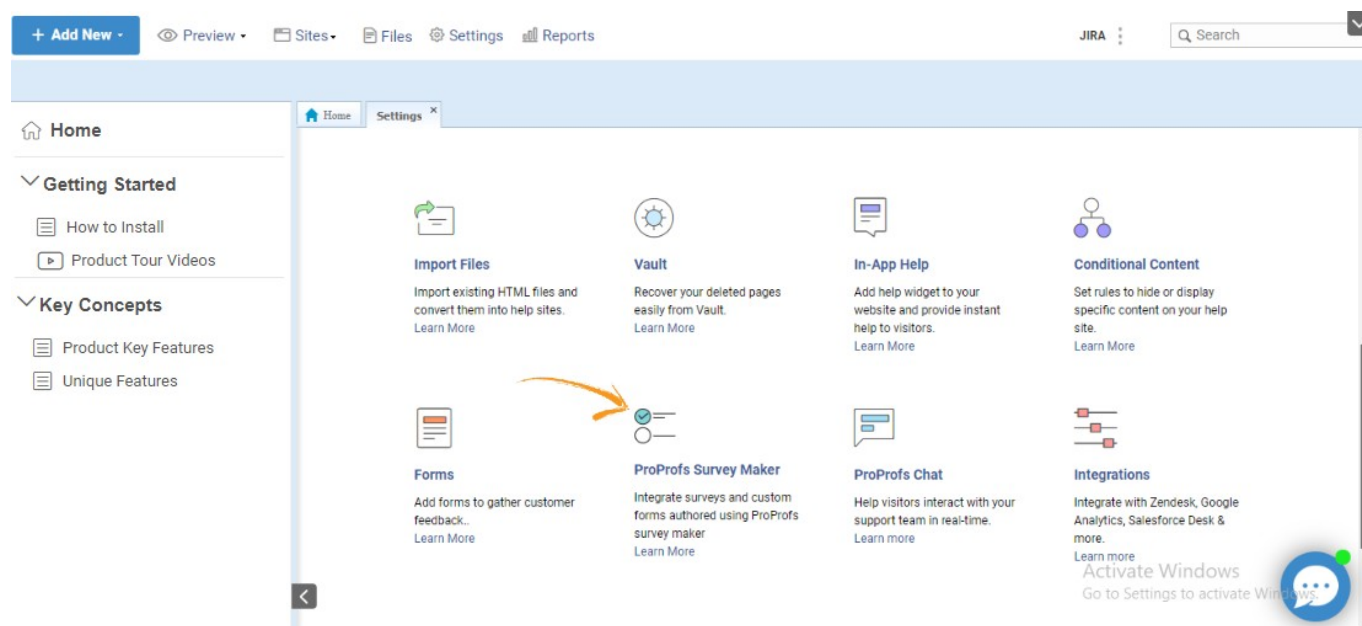
**Here's an example of a survey on the Knowledge Base:**



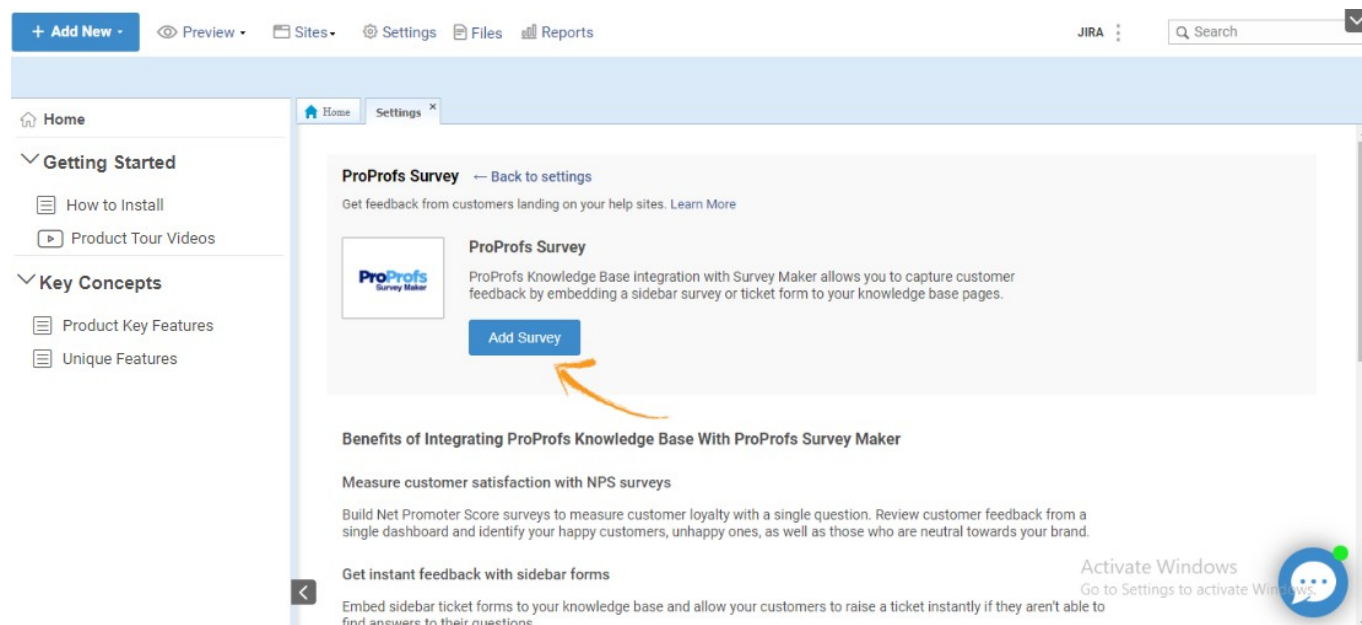
The screenshot displays the ProProfs Knowledge Base interface. On the left is a sidebar menu with categories: Home, Getting Started (How to Install, Product Tour Videos), FAQ (Where to download earlier version?, How to create a back-up?), Settings (How to configure Setting A, How to configure Setting B), Key Concepts (Product Key Features, Unique Features), and Release Notes (What's New). The main content area is titled 'How to Create a Backup' and contains placeholder text, a warning message, and three steps. A 'Support Form' overlay is visible on the right, featuring the question 'I am having a good experience using a ProProfs Knowledge Base today' and five radio button options: Strongly Agree, Agree, Neither Agree Nor Disagree, Disagree, and Strongly Disagree. A 'SUBMIT' button is at the bottom of the form.

**Here's how you can integrate ProProfs Knowledge Base with ProProfs Survey Maker:**

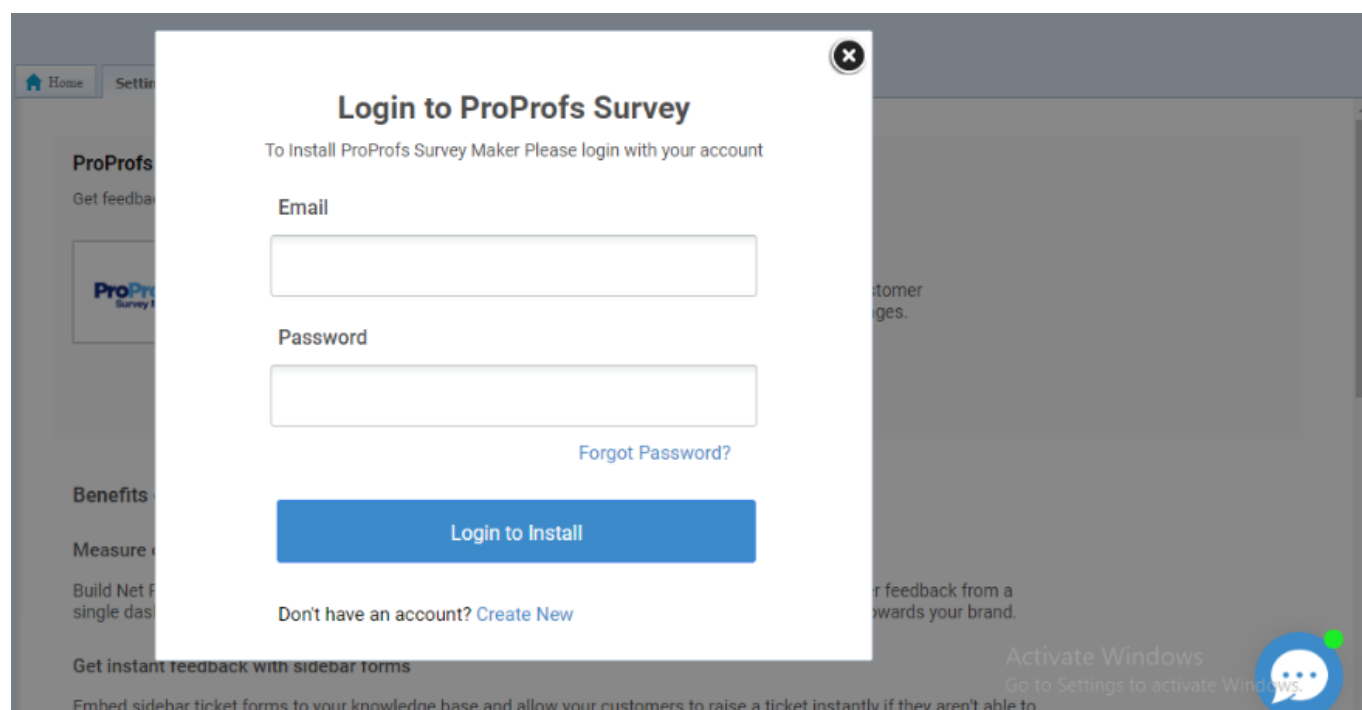
**Step 1:** On your ProProfs Knowledge Base dashboard, navigate to **Settings >> ProProfs Survey Maker**.



**Step 2:** Now click on **Add Survey** for adding Survey Maker Form into your Knowledge Base.

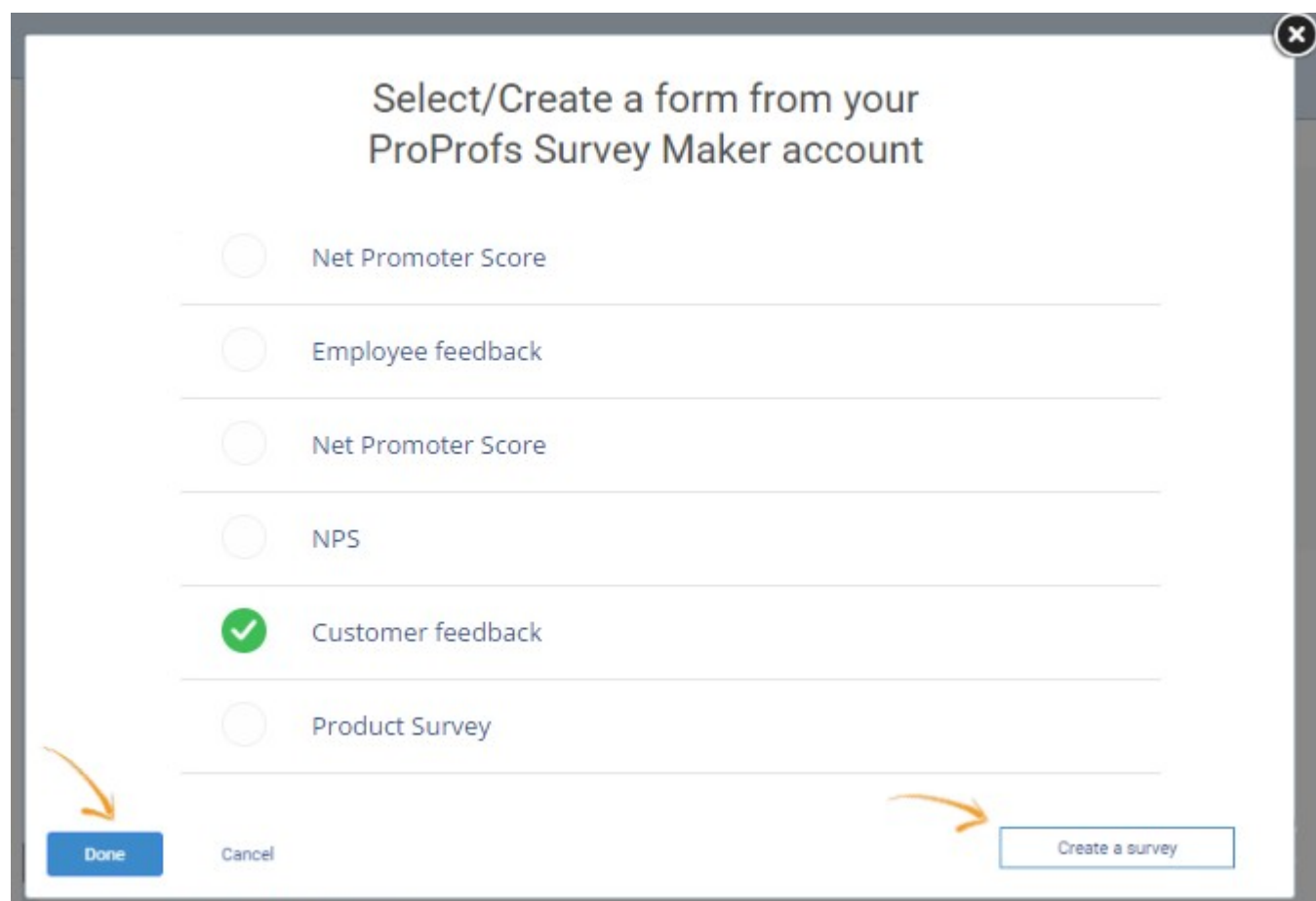


**Step 3:** Log into your Survey Maker account by providing **Email & Password**.



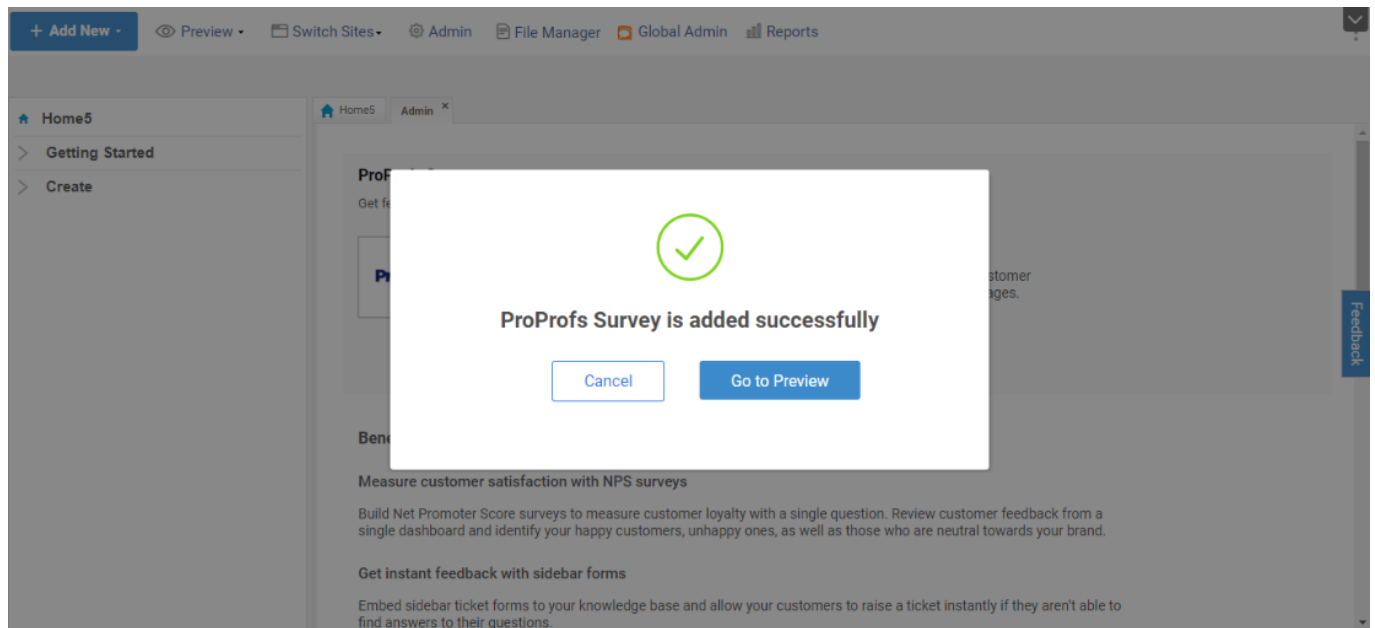
The screenshot shows a modal window titled "Login to ProProfs Survey". Below the title, it says "To Install ProProfs Survey Maker Please login with your account". There are two input fields: "Email" and "Password". Below the password field is a link that says "Forgot Password?". At the bottom of the modal is a blue button labeled "Login to Install". Below the button, it says "Don't have an account? [Create New](#)". The background shows a blurred view of the ProProfs Knowledge Base interface.

**Step 4:** Select the form and click on **Save** or **Create** a new Survey Form by clicking on **Create Survey**.



The screenshot shows a modal window titled "Select/Create a form from your ProProfs Survey Maker account". It lists several survey types with radio buttons: "Net Promoter Score", "Employee feedback", "Net Promoter Score", "NPS", "Customer feedback" (which is selected with a green checkmark), and "Product Survey". At the bottom left is a blue button labeled "Done" and a link labeled "Cancel". At the bottom right is a button labeled "Create a survey" with an orange arrow pointing to it. The background shows a blurred view of the ProProfs Knowledge Base interface.

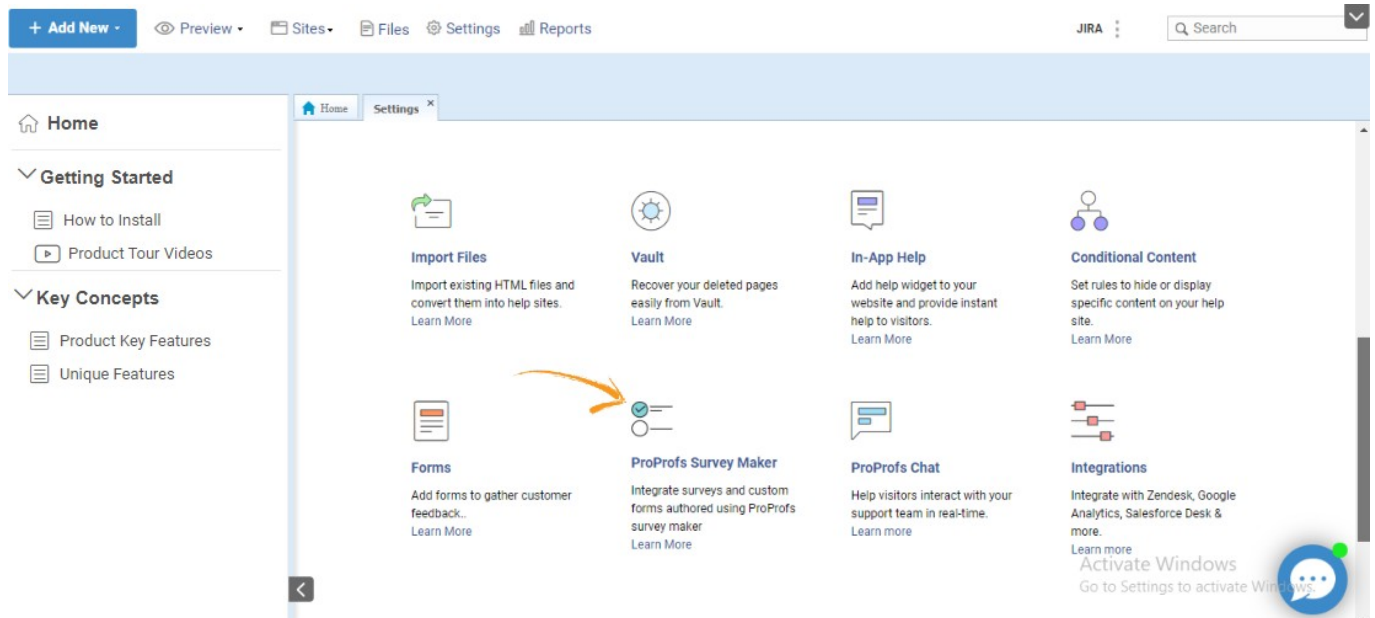
Now Survey Maker Form is Successfully added on your Knowledge Base help site. Click on **Preview** if you want to Preview the form otherwise click on **Cancel**.



**Note:** You can add only one survey form at a time on your help site.

If you want to delete the survey form, follow the below steps:

**Step 1:** From you Knowledge Base dashboard, navitage to **Settings >> ProProfs Knowledge Base**.



**Step 2:** Click on **Remove Survey**. The Survey form will remove form your Knowledge Base help site.

The screenshot displays the ProProfs Knowledge Base Admin dashboard. At the top, there is a navigation bar with links: '+ Add New', 'Preview', 'Switch Sites', 'Admin', 'File Manager', 'Global Admin', and 'Reports'. On the left, a sidebar menu shows 'Home5', 'Getting Started', and 'Create'. The main content area is titled 'ProProfs Survey' with a 'Back to settings' link. Below the title, it says 'Get feedback from customers landing on your help sites. Learn More'. A 'ProProfs Survey' logo is shown next to a description: 'ProProfs Knowledge Base integration with Survey Maker allows you to capture customer feedback by embedding a sidebar survey or ticket form to your knowledge base pages.' A red 'Remove Survey' button is present, with a yellow arrow pointing to it. Below this, a section titled 'Benefits of Integrating ProProfs Knowledge Base With ProProfs Survey Maker' lists two benefits: 'Measure customer satisfaction with NPS surveys' and 'Get instant feedback with sidebar forms'. A 'Feedback' button is visible on the right edge of the dashboard.

## Related Articles:

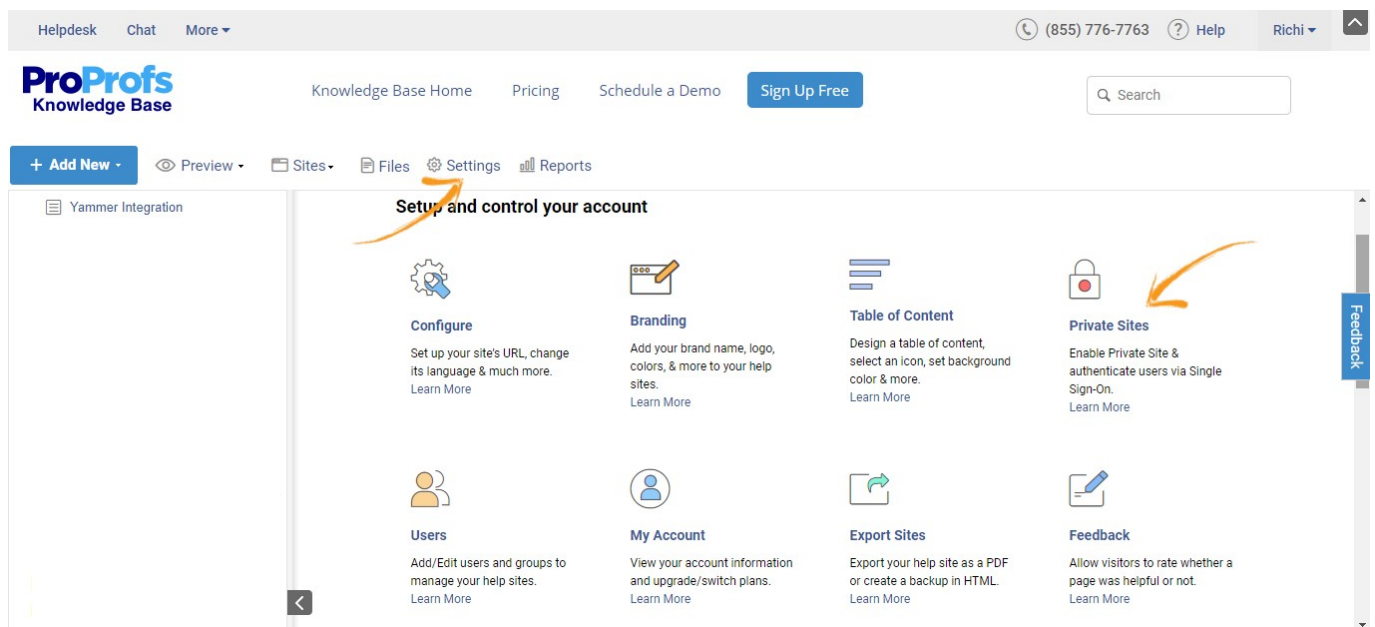
- [How to Add a Custom Form in ProProfs Knowledge Base](#)
- [How to Integrate Salesforce With ProProfs knowledge Base](#)
- [How to Integrate Freshdesk With ProProfs Knowledgebase](#)

# How to Configure SAML 2.0 for ProProfs Knowledge Base

[Okta integration with ProProfs Knowledge Base](#) allows users to authenticate to one or more Knowledge Base accounts and gain access to specific roles using single sign-on with SAML. With the help of this integration, user manage accounts and roles which are assigned to them. The Okta & ProProfs Knowledge Base SAML integration currently supports the **IdP-initiated SSO**.

## Here's how you can integrate Okta with ProProfs Knowledge Base:

**Step 1:** Log in to the ProProfs Knowledge Base Account. Navigate to **Settings >> Private Sites**.



**Step 2:** Enable **SAML** and provide Security Certificate Fingerprint and Unique Identity ID then click on **Save**.

- Enter Security Certificate Fingerprint

**For Security Certificate, Sign into the Okta Admin Dashboard to generate a certificate.**

- Enter the Unique Identity ID

**For Unique Identity ID, Sign into the Okta Admin Dashboard to generate the unique id.**

The screenshot shows the 'Settings' page for a ProProfs Knowledge Base instance. The left sidebar contains a navigation menu with categories: Home, Emergency Care, 24 Hours Support, Expert Advice, and Doctors Timetable. The main content area is titled 'healthcare-demo - English - (United States) (default) Site ID: 30583'. It features several toggle switches: 'Manage IP Access' (Disable), 'Disable Copy' (Disable), and 'Enable SAML' (Enable). Below these are two text input fields: 'Enter Security Certificate Fingerprint' and 'Enter Unique Identity ID'. A note below the fields states: '\*Copy and Paste your uniqueAppld from IDP Issuer "http://www.okta.com/[uniqueAppld]" in above Textfield'. At the bottom of the form are 'Save' and 'Cancel' buttons. An orange arrow points to the 'Enable SAML' button, and another orange arrow points to the 'Save' button. A 'Feedback' button is visible on the right side of the page.

## Related Articles:

[How to ProProfs Live Chat Integration With ProProfs Knowledge Base](#)

[How to Integrate Slack With ProProfs Knowledge Base](#)

[How to Add ProProfs Survey Maker Form in ProProfs Knowledge Base](#)



# How to Integrate Azure AD With ProProfs Knowledge Base

This is a step-by-step guide to **integrating Azure Active Directory with ProProfs Knowledge Base**. To perform this integration, you require:

- An Azure AD subscription. If you don't have a subscription, you can create a free account.
- ProProfs Knowledge Base account (premium subscription that comes with single sign-on).

## Benefits of integrating Azure AD with ProProfs Knowledge Base:

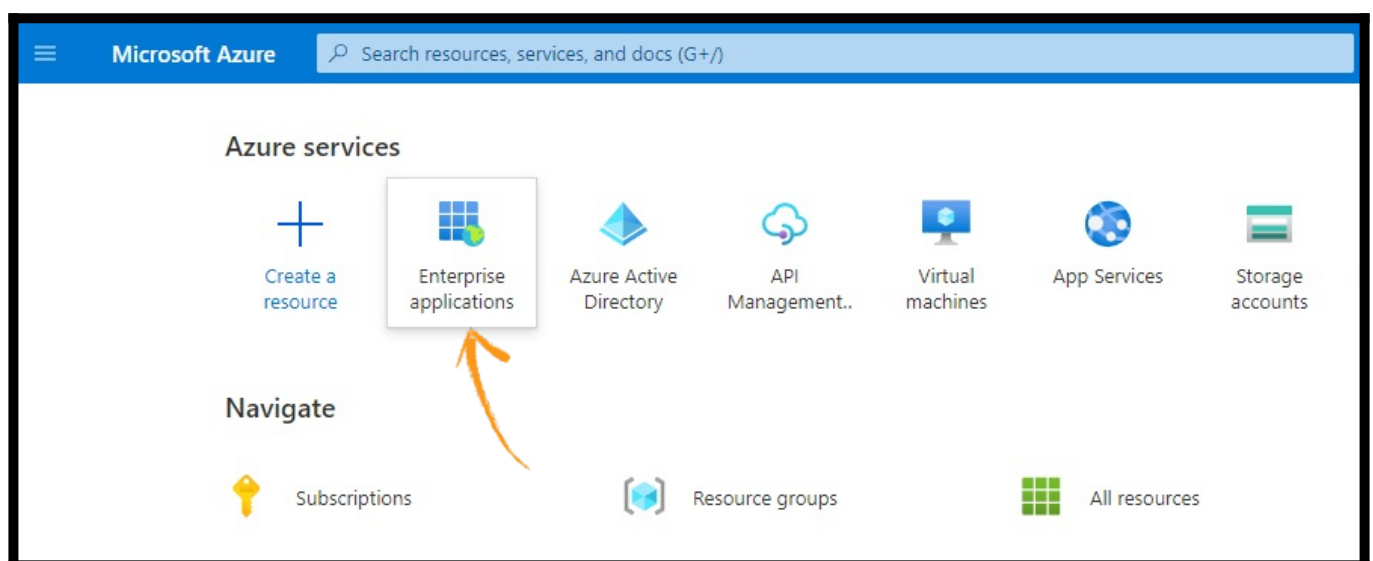
- Manage user access to the Knowledge Base from within Azure AD
- Enable Azure AD users to sign in to ProProfs with a single login
- Manage all your user accounts without leaving the Azure portal

## In this article, you'll learn:

- [How to Integrate Azure AD With ProProfs Knowledge Base](#)
- [How to Assign Users to an App](#)
- [How to Locate Direct Access URL](#)

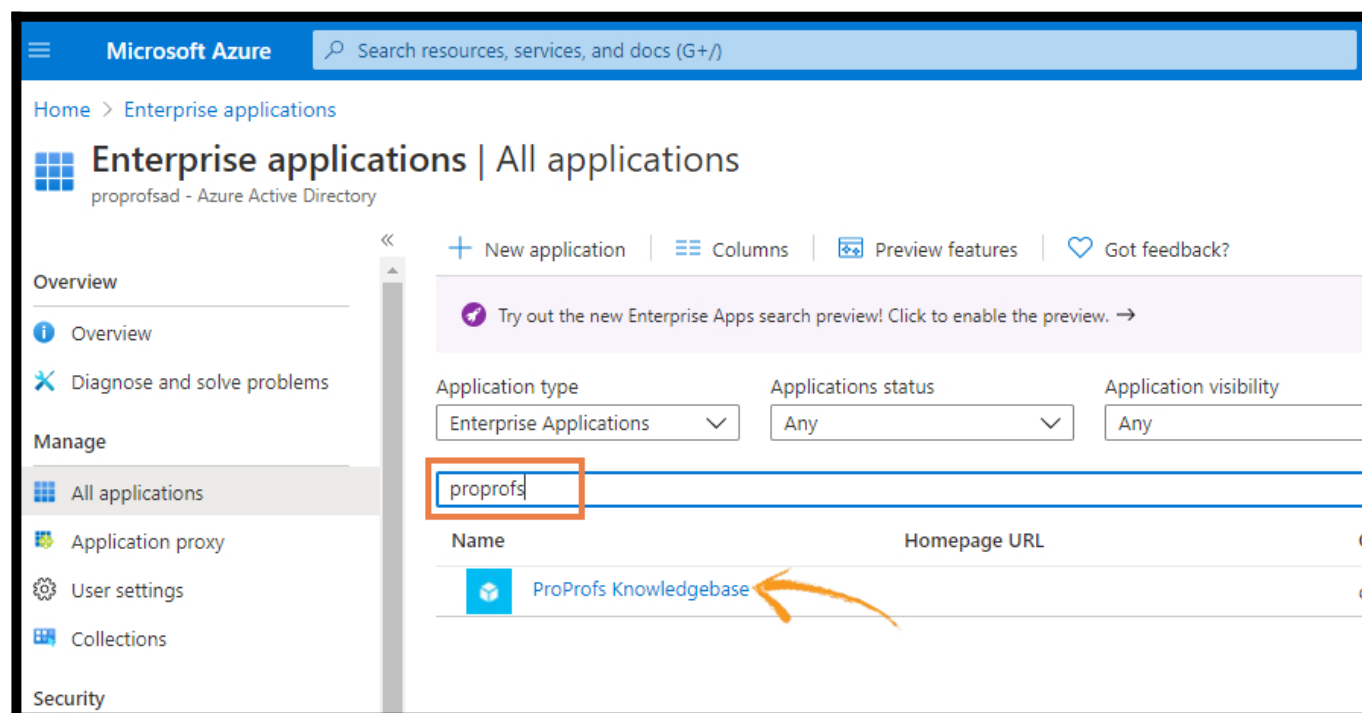
## How to Integrate Azure AD With ProProfs Knowledge Base

**Step 1.** Log in to your Azure AD account and select **Enterprise applications** under **Azure services**.

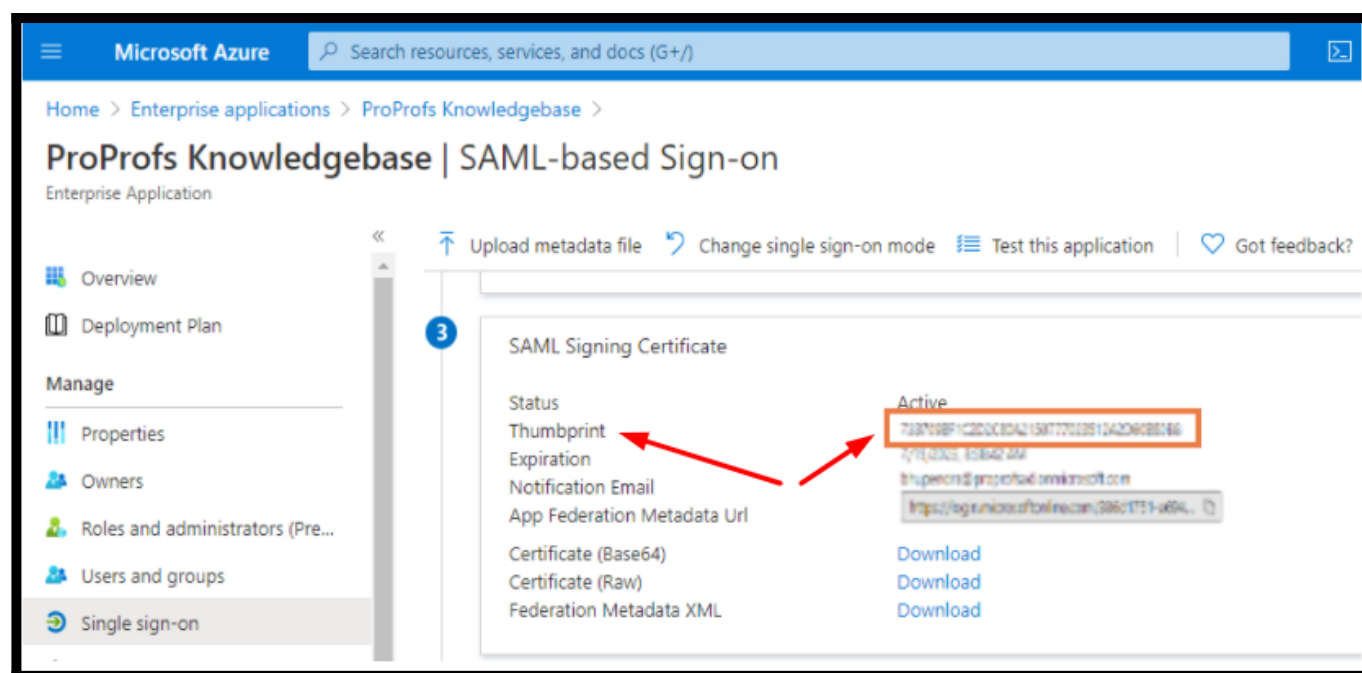


**Step 2.** Search for **ProProfs Knowledge Base**. When it appears, click it, and select 'set up Single Sign-On.'

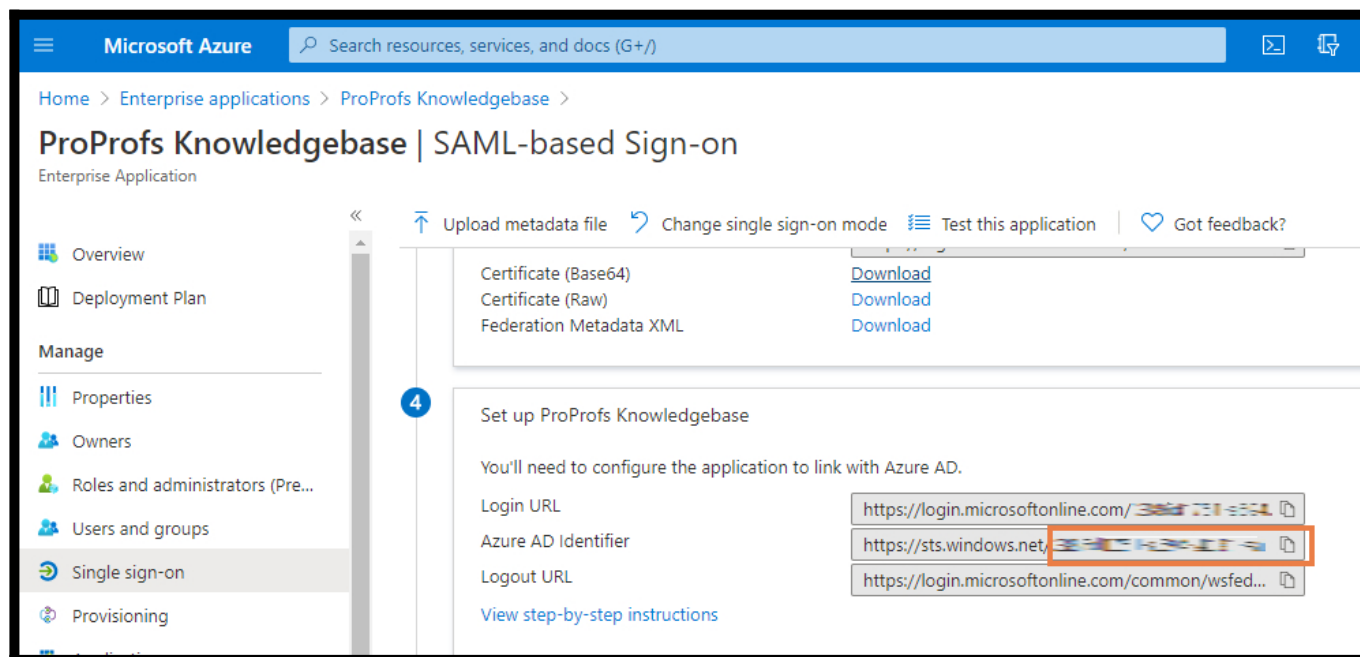




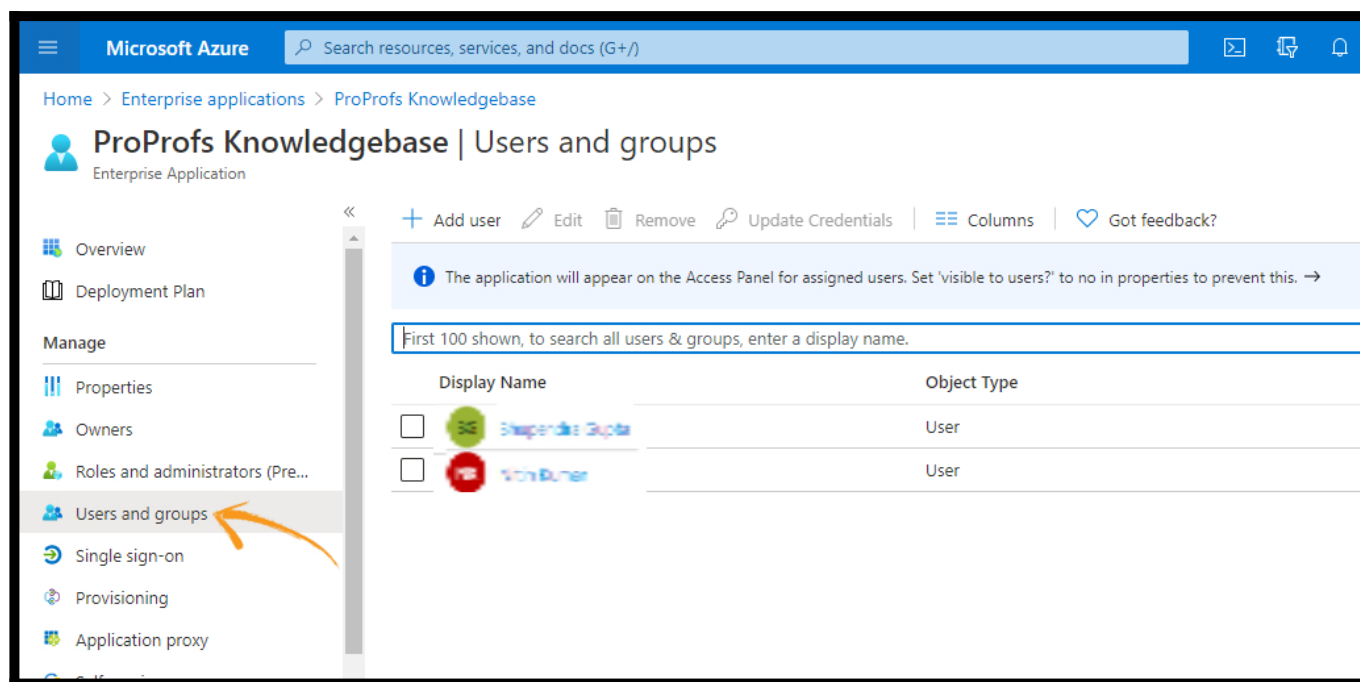
**Step 3.** Copy the **Thumbprint** on a notepad. You'll require it shortly.



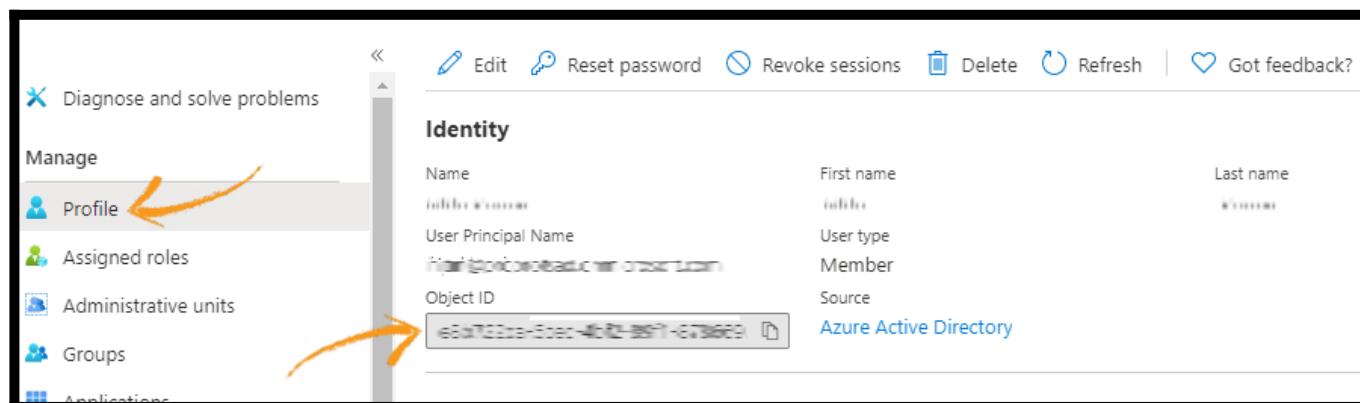
**Step 4.** Also, copy the **Azure AD Identifier** (only the part after <https://sts.windows.net/>). You'll require it shortly.



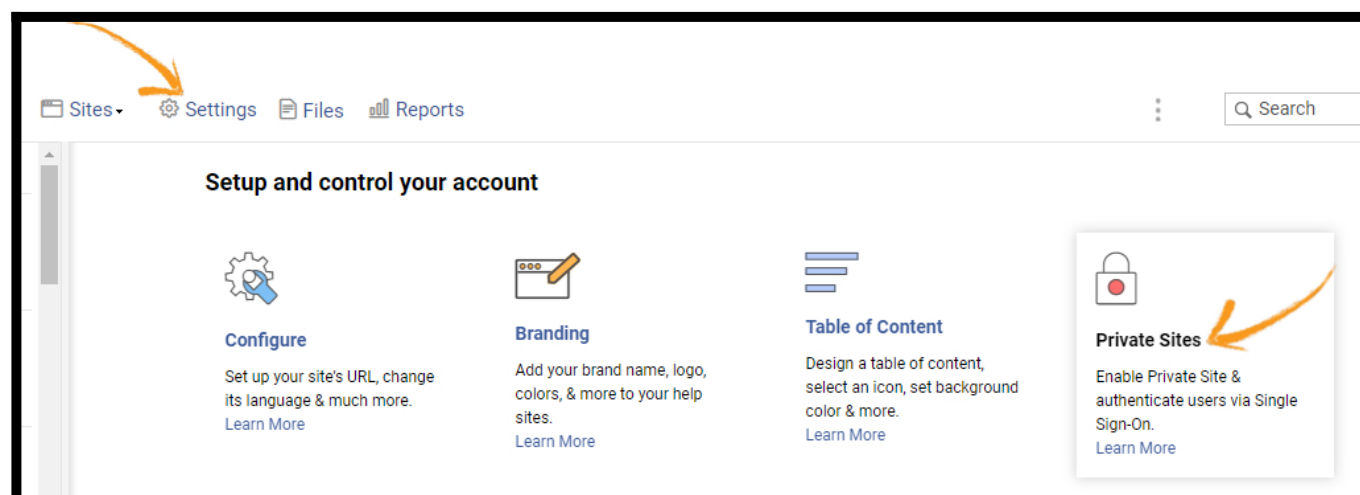
**Step 5.** Select **Users and groups** from the left-hand side menu.



**Step 6.** Click **Profile** and copy the **Object ID** under the Identity section. You'll require it shortly.



**Step 7.** Now go to your Knowledge Base **Settings >> Private Sites**.



**Step 8.** Activate the option **Enable SAML** and follow the instructions in the screenshot below.

1. Copy the **Thumbprint** here.
2. Copy the **Azure AD Identifier** here.
3. Copy the **Object ID** here.

Finally, click **Save**. The integration is successful.

## How to Assign Users to an App

**Step 1:** In the Azure AD portal, select **Enterprise applications**. Then find and **select the application** you want to configure.

**Step 2:** In the left navigation menu, select **Users and Groups**.

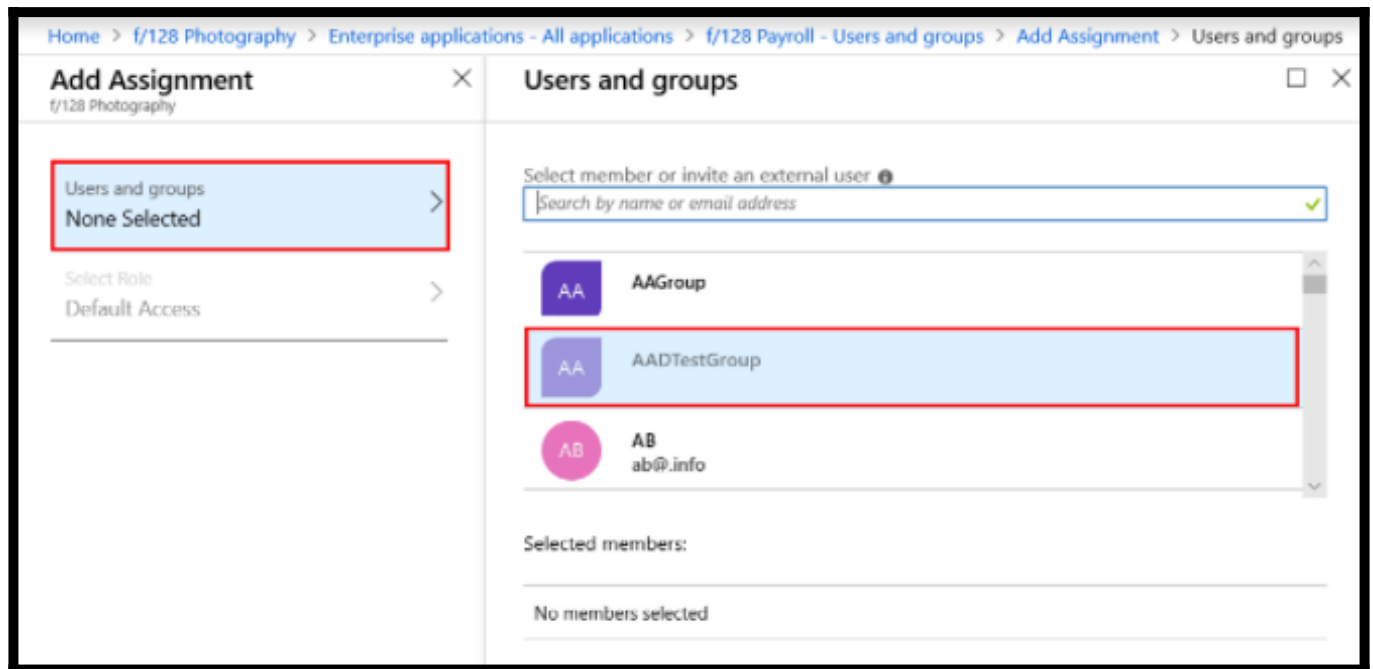
**Step 3:** Select the **Add user** button.

**Step 4:** On the **Add Assignment pane**, select **Users and Groups**.

**Step 5:** Select the user or group you want to assign to the application. You can also start typing the name of the user or group in the search box. You can choose multiple users and groups, and

your selections will appear under **Selected items**.

**Step 6:** When finished, choose **Select**.



**Step 7:** On the **Users and Groups** pane, select one or more users or groups from the list and then choose the **Select** button at the bottom of the pane.

**Step 8:** If the application supports it, you can assign a role to the user or group. On the **Add Assignment** pane, choose **Select Role**. Then, on the Select Role pane, choose a role to apply to the selected users or groups, then select **OK** at the bottom of the pane.

**Step 9:** On the **Add Assignment** pane, select the **Assign** button at the bottom of the pane.

#### Note

- \* Object ID is used to identify the master user enabling the SSO. It is for our application purpose
- \* Users should be available in both KB and Azure.
- \* Make sure you are entering the correct value in the Knowledgebase.

For more information, [click here](#).

## How to Locate Direct Access URL

**Step 1:** Navigate to the **Azure Active Directory** service in the Azure Portal using <https://aad.portal.azure.com>.

**Step 2:** Now click on **Enterprise Application** in the left navigation.

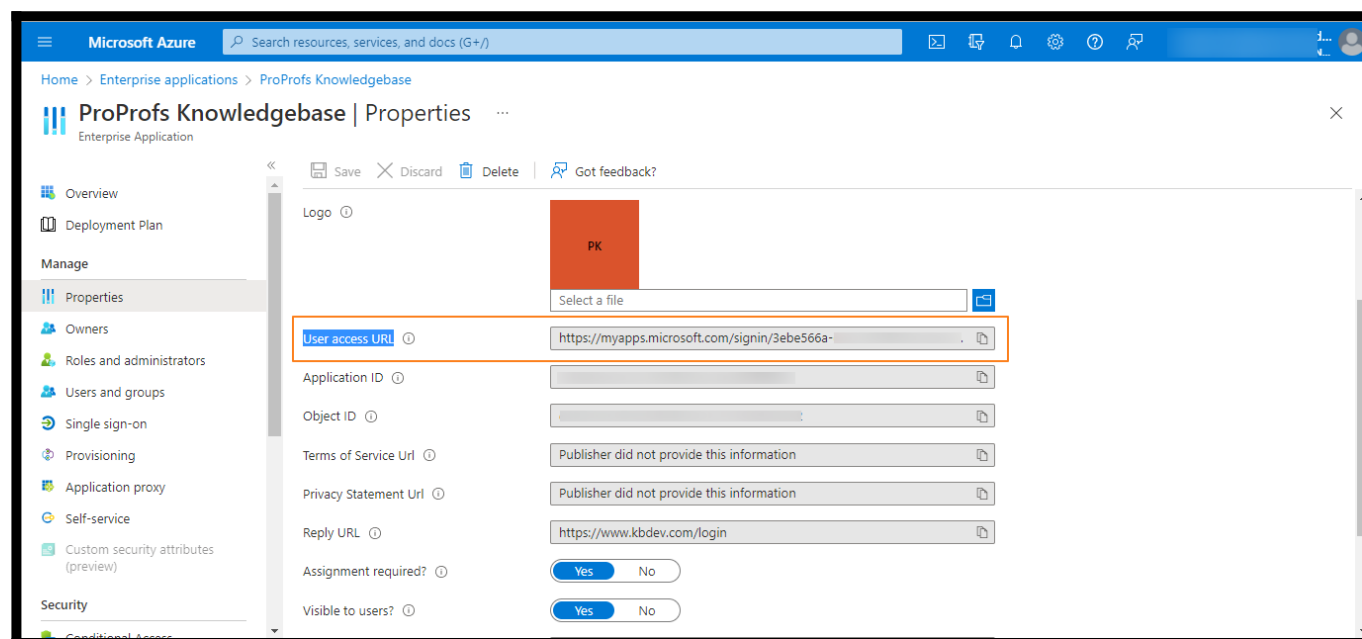
**Step 3:** Search for the application in the search bar on the right.

**Step 4:** Click on the application to go to the **application details**.

**Step 5:** Now click on the **Properties** in the left navigation.

**Step 6:** You can see the **User Access URL** link on the right-side page. **Copy** it and provide that to the user. Doing so will save users from visiting the My Apps page to access the app.

User Access URL link can **directly** take them to the application and do the SSO.



*That is all about integrating Azure AD with ProProfs Knowledge Base.*

### Related Articles:

- [How to Integrate Slack with ProProfs Knowledge Base](#)
- [How to Integrate Disqus with ProProfs Knowledge Base](#)
- [How to Integrate JIRA with ProProfs Knowledge Base](#)

# Reports

# Overview of Reports

Video About: [How to Analyze Your Knowledge Base Reports](#)

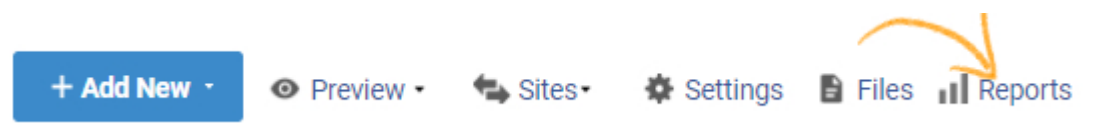
**Want more reports? Try our free [Google Analytics Integration](#)**

# Summary

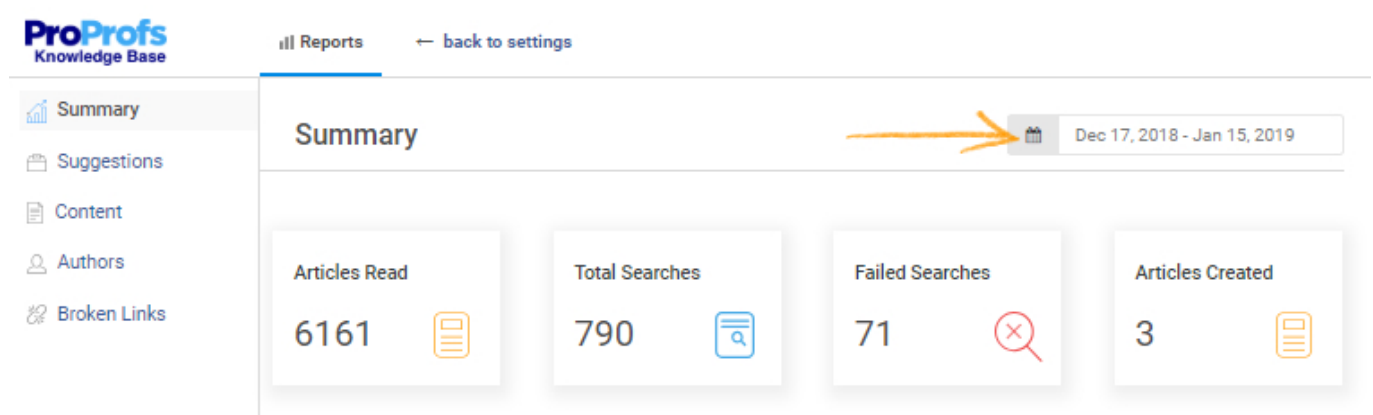
Reports display graphs and tabular data, giving you an overview of your Knowledge Base activity. The data is intended to help you optimize your content management strategy and improve its efficiency. The summary report answers all prominent questions related to your Knowledge Base and enables you to analyze your team's performance.

## Here's how you can access the summary report:

Log in to your ProProfs Knowledge Base admin account and navigate to the "Reports" tab. Summary is the default report that loads up.



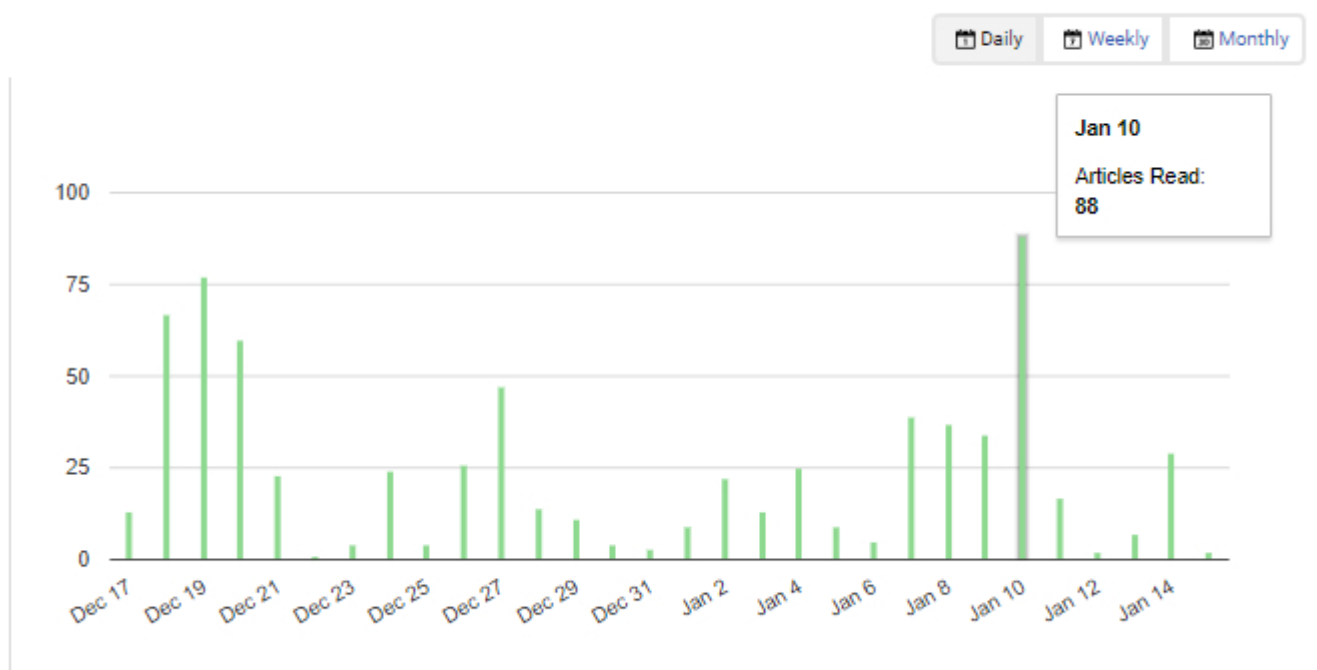
The summary report displays data for number of reads for all articles, searches in the knowledge base, number of failed searches, number of articles created, etc. You can click the appropriate button to view a detailed report of the mentioned data, and also view the summary report for a particular period by clicking the calendar icon to select the dates.



**Total Reads:** It is a graphical representation that shows you how many reads the knowledge base received. You can select to view data for daily, weekly, or monthly format.



### How many articles did the users read?



**Most Read Articles:** It is a tabular representation of data listing your knowledge base articles/pages in descending order of the number of reads. You can download this data by clicking the "download" button and also view any article on the list by clicking the "preview" button.

## Which are the most read articles?

Download



Articles ↑	Reads ↓	
Create a Knowledge Base	96	
Single Sign-On (SSO)	81	
Add and Customize a Site	79	
Guide to the Content (WYSIWYG) Editor	77	
Pop-Up Window	73	
Introduction to Conditional Content?	71	
Lightbox	70	
Menu and Navigation Tour	61	
Introduction to Contextual Help	58	
Roles and Permissions	56	

Showing 1 to 10 of 128 entries

« Previous

1

2

3

4

5

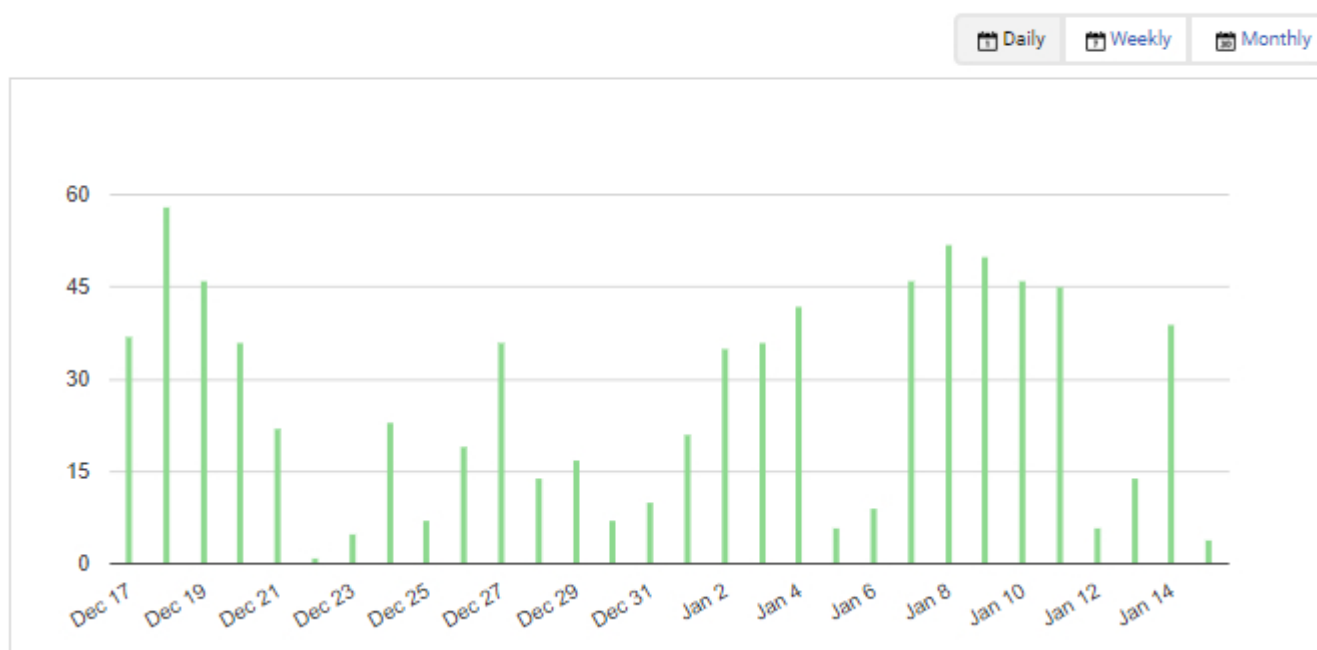
...

13

» Next

**Total Searches:** Graphical representation of data for total searches in the knowledge base. You can select to view the data for daily, weekly, or monthly format.

## How many times did users search the knowledge Base?



**Keywords:** A list of all the keywords that your users searched in the knowledge base. You can download this data by clicking the download icon. This data helps you in understanding your users' needs and what they are looking for.

## What keywords are users searching?

Download



Show 10 Keywords

Keywords ↑	Searches	Results ↑
add site	2	7
delete site	1	4
settings	2	60
settings and integrations	2	60
add user	1	60
adfs	1	No Result
advanced	1	17
advanced search	1	38
alphabetize	1	4
alphabetize folders	1	32

Showing 1 to 10 of 227 Keywords

« Previous

1

2

3

4

5

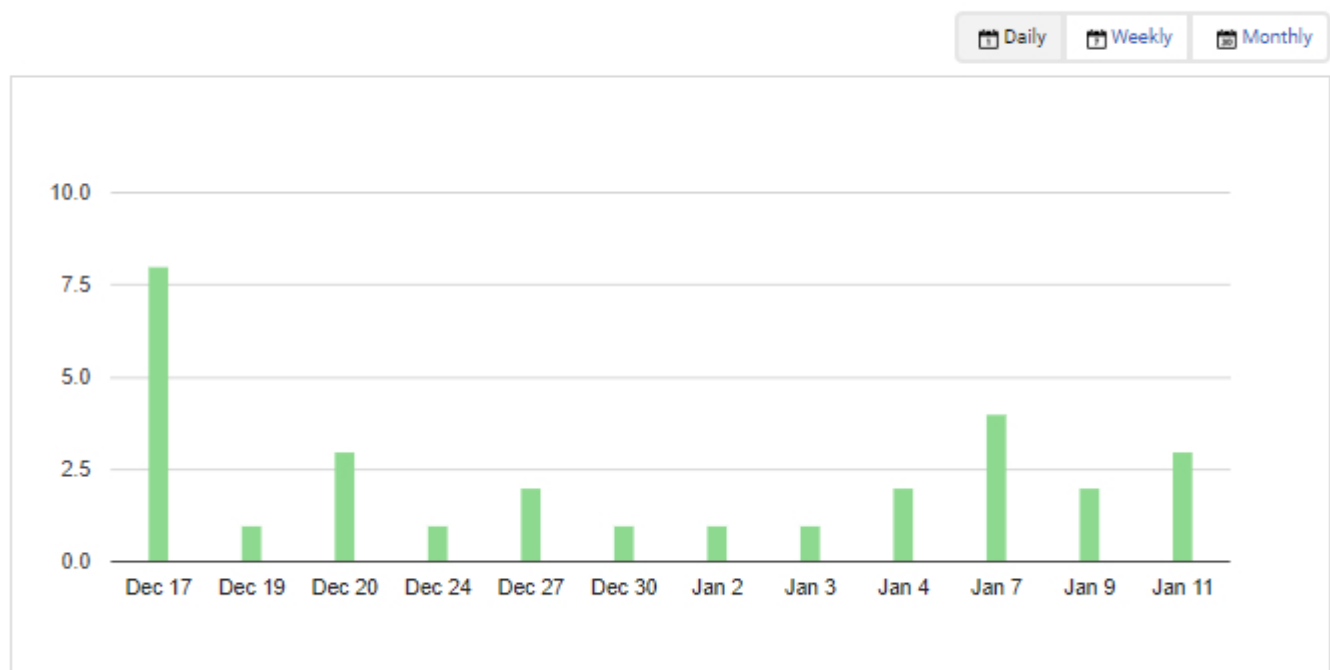
...

23

» Next

**Failed Searches:** This section of the summary report shows you how many failed searches were recorded in your knowledge base and also lists the keywords which lead to the failed searches. You can use this data to consider adding new articles related to the failed searches.

### How many failed searches did we have?



**New Articles:** This section shows you data for new articles created and also which of your authors created which article. You can download this data by clicking the download button.

## Who created new articles?

Download



Title ↑	Author ↑	Published Date ↑	
Brand and theme capability	Anton	Dec 21 2018	
Improving collaboration	Anton	Dec 21 2018	
Overview of settings	Anton	Dec 21 2018	

Showing 1 to 3 of 3 entries

« Previous

1

» Next

## What is a Knowledge Base and How It Works

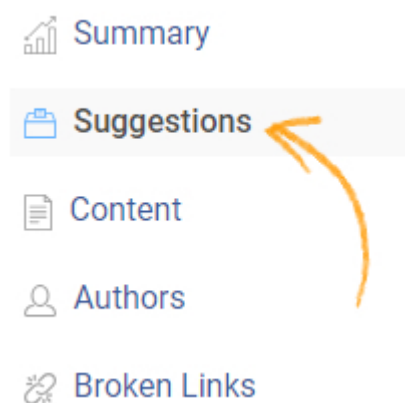
Video About: [What is A Knowledge Base and How it Works?](#)

# Suggestions

Suggestions provide you all the necessary data you need to improve your knowledge base effectively. It highlights your poorly rated articles, lists failed keyword searches and suggests popular articles to extend further.

## Here's how you can access suggestions:

Log in to your knowledge base admin account and navigate to the "Reports" tab. Select 'Suggestions' from the vertical menu.



**Failed Keywords:** The report lists all the keywords which failed to yield any result. You can use this data to consider adding new articles related to the keywords, or you can add keywords to your articles, so they show up in the search results.

For example in the below screenshots 'analytic' and 'analytics' failed to show results, such spelling variations are not recognized in the search so all possible keywords should be listed in the article for better search results. The data helps you in identifying all such keywords.

## What keywords failed to yield any result?

Download

Keywords ↑	Searches ↑
 508	2
 99	1
 accessibility	1
 accessibility	5
 adfl	1
 adfs	10
 adsl	1
 analytic	3
 anayltics	1
 ancor	1

« Previous

1

2

3

4

5

...

10

» Next

**Poorly Rated Articles:** The report lists poorly rated articles in descending order of their ratings. It helps in identifying articles with an immediate requirement for improvement. You can view the articles directly from the table by clicking the preview icon.



## Which articles are rated poorly?

Download



Articles ↑

Conditional Content	
Contextual Help	
Copy of Introduction to Conditional Content	
Create	
Create a Knowledge Base - Copy	
Design Word-Class Knowledge Base	
Editing Content	
GDPR	
Getting Started	
Home - ProProfs Documentation	

« Previous

1

2

3

4

5

6

7

» Next

**Popular Articles:** Articles are listed in ascending order of their popularity with 'Up Votes,' 'Down Votes' and 'Reads.' You can also download the data, preview the articles and view the report in reverse order.

## What are my popular articles?

Show  Articles



Articles	Up Votes	down Votes	Reads	
Knowledge Base " Help & Support	33	59	944	
Roles and Permissions	20	6	247	
Introduction to Contextual Help	14	7	203	
Guide to the Content (WYSIWYG) Editor	13	5	205	
Submit A Ticket	11	12	71	
Adding Videos to a Page	9	2	62	
Lightbox	7	2	174	
Private Sites	7	8	154	
Google Analytics Integration with ProProfs Knowledgebase	7	6	125	
How to add a custom domain	7	2	105	

Showing 1 to 10 of 89 Keywords

« Previous

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» Next

## Here's how you can analyse your Knowledge Base Reports

Video About: [How To Analyze Your Knowledge Base Reports](#)

# Content

The content reports provide data related to all the articles in the knowledge base. You can view data for new articles created, popular articles, and most liked articles.

Here's how to access the content reports:

Log in to your knowledge base admin account and navigate to the "Reports" tab. Select "Content" from the vertical menu.

 Summary

 Suggestions

 Content

 Authors

 Broken Links

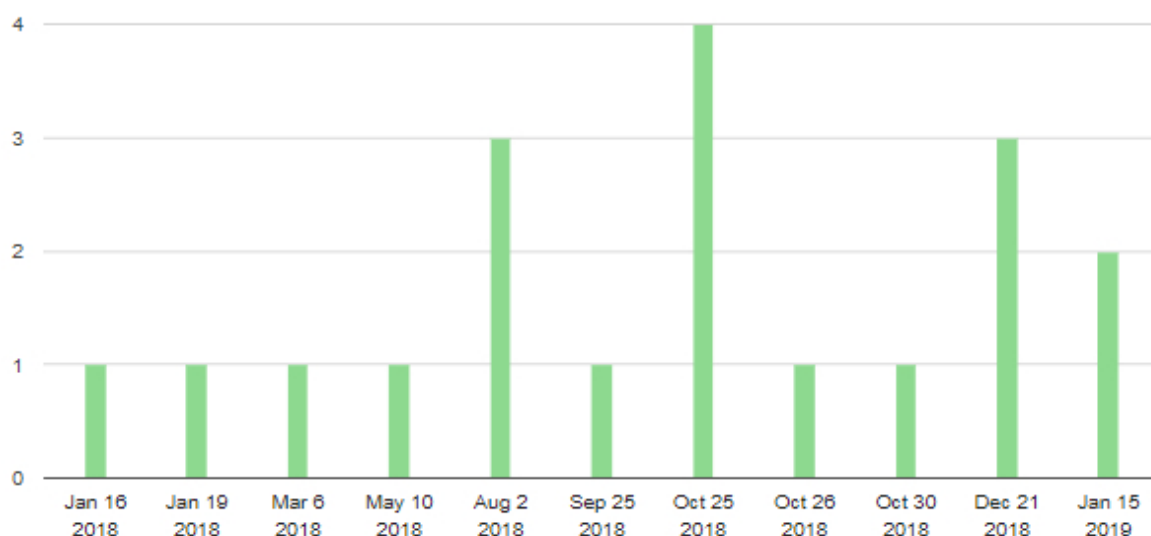
**New Articles:** It provides data for the number of new articles created in a particular time-frame. You select to view this data in daily, weekly or monthly format.

**How many new articles does the Knowledge base have?**

 Daily

 Weekly





















 Monthly



**Popular Articles:** A list of articles arranged in descending order of their popularity. You can also select to arrange the list in reverse order.

### Which are the most popular articles?

↓

Articles ↑	Reads ↓	
 Create	296	
 Single Sign-On (SSO)	294	
 Create a Knowledge Base	272	
 Add and Customize a Site	250	
 Settings	244	
 Roles and Permissions	238	
 Guide to the Content (WYSIWYG) Editor	201	
 Introduction to Contextual Help	199	
 Introduction to Conditional Content?	188	
 Lightbox	171	

« Previous 1 2 3 4 5 ... 10 » Next

**Most Liked Articles:** A list of articles arranged in order of the number of 'Up Votes' received.

## Which are the most liked articles?



Articles ↑	Up Votes ↓	
Roles and Permissions	20	
Introduction to Contextual Help	14	
Guide to the Content (WYSIWYG) Editor	13	
Submit A Ticket	11	
Adding Videos to a Page	9	
System Requirements	8	
Lightbox	7	
Sync Page	7	
Folder Restrictions	7	
Content Snippets	7	

« Previous

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» Next

## Here's how you can analyse your Knowledge Base Reports

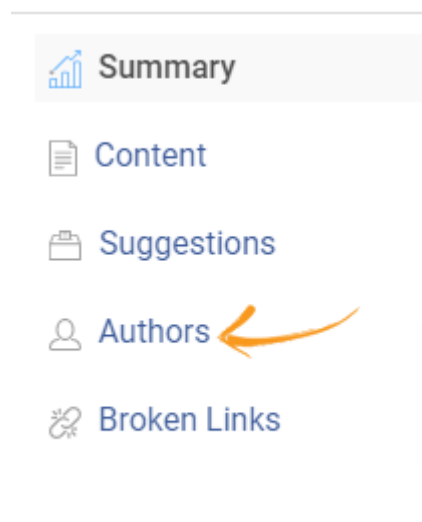
Video About: [How to Analyze Your Knowledge Base Reports](#)

# Authors

The author reports offer insights into your authors' activities. It contains reports related to their [contribution](#) and [logins](#).


**Here's how to access the author reports:**

Log in to your knowledge base admin account and navigate to the "**Reports**" tab. Select "**Authors**" from the vertical menu.



**Contribution:** The report provides data for the authors' activities such as the number of articles created, total 'Up Votes' and 'Down Votes' received, number of reads on their articles, etc. You can download this data by clicking the download button.

## Who contributed the most?

<input type="text" value="Search"/>						
Name	↑	Articles ↓	Up Vote ↑	Down Vote ↑	Reads ↑	Words_Count ↑
Paul		119	340	365	7853	488
Anton		12	4	2	285	49
David		5	4	6	223	19
Brandon		2			38	10

« Previous 1 » Next

**Logins:** The report lists all the authors in order of their most recent logins, so you can see which authors are active.

## When did the author last logged in?

↓

Name ↑	Last Login ↓	Timesheet ↑
<div style="background-color: #ccc; width: 100px; height: 15px;"></div>	Today	🕒
<div style="background-color: #ccc; width: 100px; height: 15px;"></div>	Sep 23, 2021 10:13 am	🕒

« Previous
1
» Next

You can click on the **"Time"** icon under the **"Timesheet"** column to access the timesheet of an author and check the timings of their logins and logouts for the last 30 days.

✕

Data is available of the last 30 days only

Jan 25	Login	Logout	Login Hours
Jan 24	11:28:48 am	N/A	N/A
Jan 23	15:49:44 pm	16:19:14 pm	0 Hours 29 Min 30 Sec
Jan 22			
Jan 21			
Jan 20			
Jan 19			
Jan 18			
Jan 17			

**Note:** If a user logs in but directly closes the tab instead of logging out, no log out time and total hours will be recorded.

## Here's how you can analyze your Knowledge Base Reports

Video About: [How to Analyze Your Knowledge Base Reports](#)

### Related Articles:

- [Add and Customize a Site](#)
- [How to Add a Page Footer](#)
- [How to Add Toggle Content](#)





## Here's how you can analyse your Knowledge Base Reports

Video About: [How to Analyze Your Knowledge Base](#)

# Advanced

# GDPR

# ProProfs' Commitment to GDPR

Here, at ProProfs we are committed to protecting your data and respecting your privacy. The General Data Protection Regulation (GDPR), a new regulation, is a set of security principles and protocols laid by the European Union to protect the data interests of European Citizens. The regulation is in effect from May 25th, 2018. [Learn More](#)

## What is GDPR?

The General Data Protection Regulation (GDPR) aims to ensure that corporations inside or outside the European Union become more transparent about how they collect, handle and process personal data of European Citizens. The primary goal of GDPR compliance is to eliminate security gaps when it comes to collecting data from the users and allow total data control back to the users. The GDPR laws vary depending upon your location and the role you play in respect to the EU citizens. Find out more specific information on GDPR on [Wikipedia](#). With GDPR in effect, most organizations that collect, maintain, or process EU residents' personal data (regardless of the organization's global location) are required to implement specific procedures and safeguards for that data. We at ProProfs have made GDPR compliance a priority and are working to ensure we reach the required levels of transparency and compliance.

## Where can I read ProProfs' privacy policy?

ProProfs shares the GDPR's commitment to transparency, fairness, and accountability which is why we have updated our [Privacy Policy](#) and [Terms of Service](#). Please check them out and email us at [privacy@proprofs.com](mailto:privacy@proprofs.com) if you have any questions!

## How do I add cookie consent to my website?

Cookie Consent is a part of privacy legislation that requires websites to get consent from visitors to store or retrieve any information on your device. If GDPR requires you to add a cookie consent to your website you can use free solutions like '[Cookie Consent by Insites](#)' to add cookie consent to your website.

**Suggested Reading:** [How Does ProProfs Knowledge Base Support Data Portability?](#)

# How Does ProProfs Knowledge Base Support Data Portability?

With GDPR in effect from 25th May 2018, every user has the right to access their data.

Administrators can access their end-users data and help serve their users' data rights. [Learn more about GDPR and Data Portability.](#)

ProProfs Knowledge Base allows customers to access and export their data, i.e. [Export a site](#) created using the Knowledge Base.

# How Do I Delete Users and Their Information?

With GDPR in effect from 25th May 2018, every user has a right to erasure for their data. Survey Maker allows administrators to remove their end-users data to help serve users' data rights. [Learn more about GDPR and the right to erasure.](#)

ProProfs Knowledge Base allows customers to delete their users profile and information. Read "[Add, edit and delete users](#)" to know more. Additionally, the customers can delete their own data, i.e. deleting the sites created in knowledge base. Read "[Edit or delete a site](#)" to know more.

# Contextual Help



# Introduction to Contextual Help

- [What is Contextual Help](#)
  - [Lightbox](#)
  - [Pop-up](#)
  - [Tooltip](#)
- 

## What is Contextual Help?

[Contextual help](#) is help that is displayed in your product or web site. It is great for guiding users on what a specific feature does or what a field means. Contextual help will give answers to questions directly in your product without requiring the user to browse your entire [help documentation](#).

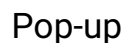
- **Explain** something that is not self-explanatory or intuitive.
- **Provide** more information about an item, such as a “learn more” or “what’s this” link.
- **Get users started** using your website or application.
- **Guide users** on certain features of functionality or provide a quick video tour.

Most contextual help is usually “hard-coded” into your app which makes changes and updates difficult. ProProfs solves this problem by allowing you to update and manage the content separately from your site. ProProfs generates a small JavaScript snippet to place on your website where you want the help to appear.

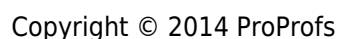
## Lightbox

Lightboxes are great for displaying help content. Lightboxes are not pop-ups; rather, they are an overlay on top of the current page. Sites like Facebook and Amazon make heavy use of lightboxes to display content. You can turn any page in ProProfs into a lightbox and embed it on your own website or web app. Follow [this guide](#) to learn how to use lightboxes.

Sample lightbox



## Sample pop-up



## Tooltip

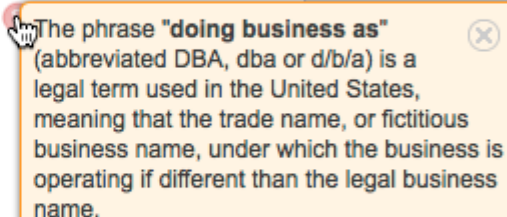
A tooltip is a small rectangular overlay that displays a brief description. When a user hovers their cursor over a link, a tooltip will appear providing hints or tips. Unclear input fields in web forms are perfect for tooltips. ProProfs makes it easy to create and manage dynamic tooltips and generates a small code snippet you add to your own website or web app. Follow [this guide](#) to learn how to use tooltips.

### Simple tooltip

Business Name on Card:\*

Doing Business As:

Business Zip Code:\*



The phrase "**doing business as**" (abbreviated DBA, dba or d/b/a) is a legal term used in the United States, meaning that the trade name, or fictitious business name, under which the business is operating is different than the legal business name.

### Example of a tooltip with an image

Legal Business Name:\*

Business Name on Card:\*

Credit Card CVV:\*

Doing Business As:

Business Street Address:\*

Official Business Phone Number:\*

   ?

E-mail Address:\*

 ?

Industry Type:\*

 ▾

Company Str

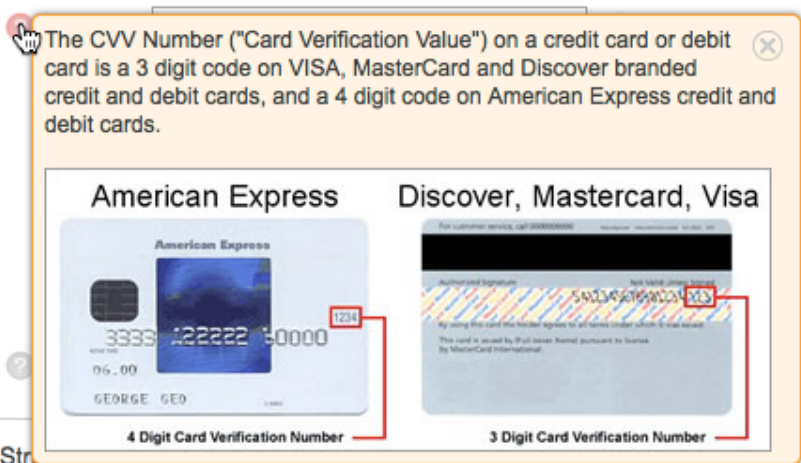
 ▾ ▾

Years in Business:\*

 ▾

Number of Employees:\*

Federal Tax ID:\*

  ?

## Here's how you can design your Knowledge Base Reports

Video About: [How to Design Your Knowledge Base](#)

### Related Articles:

[Add a Lightbox](#)

[Add a Popup](#)

[Create a Tooltip](#)

# Introduction to Conditional Content

- [What is Conditional Content?](#)
  - [What is Conditional Content used for?](#)
  - [Who can use Conditional Content?](#)
  - [How to use Conditional Content?](#)
  - [Rule Sets](#)
- 

## What is Conditional Content?

Conditional Content is an intelligent set of rules and conditions using which you can hide or display specific content on your help site.

- **Restrict editing permissions** of users and groups
- **Restrict viewing permissions** of users and groups
- **Save rule sets** to use across multiple sites

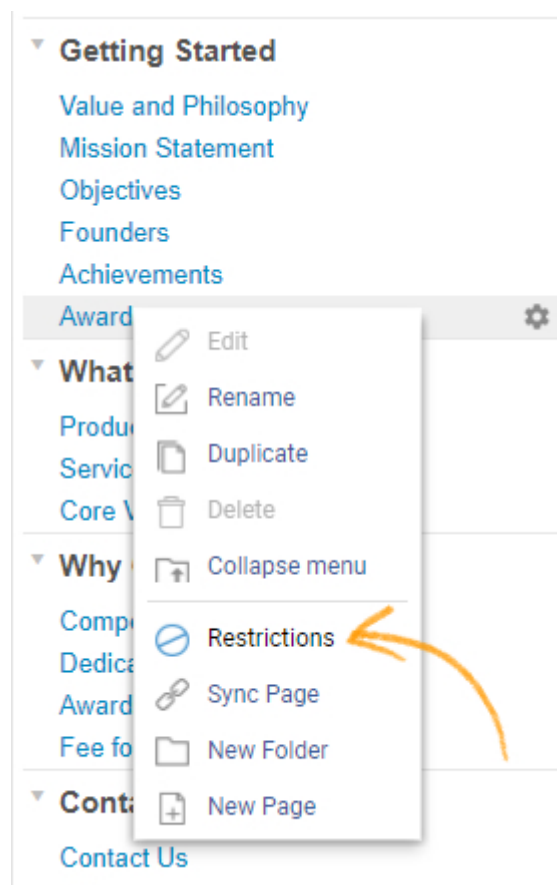
## What is Conditional Content used for?

Conditional Content can be used to set up rules for content visibility, to restrict or to allow access to a page or folder's content. You can use Conditional content for purposes such as:

- Hide certain parts of content if viewing device is a phone
- Show pricing chart if members of the sales team login
- Show advanced troubleshooting section or internal procedure if the user is part of the support team



Here's an example:



1: Open the contextual menu for the page and navigate to "Restrictions."




2: Set up the conditional logic, in this case, the viewing device. Save the changes.


#### Page Restrictions




**Editors**   
Select user(s) 


**Viewers**   
Select user(s) 



☒ **Show or hide based on conditional logic**  
For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page for folder. [Learn more](#)

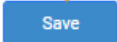

☒ Enter your own rules using the logic builder ☐ Apply a rule set select rule set 

If Any  of the following match:

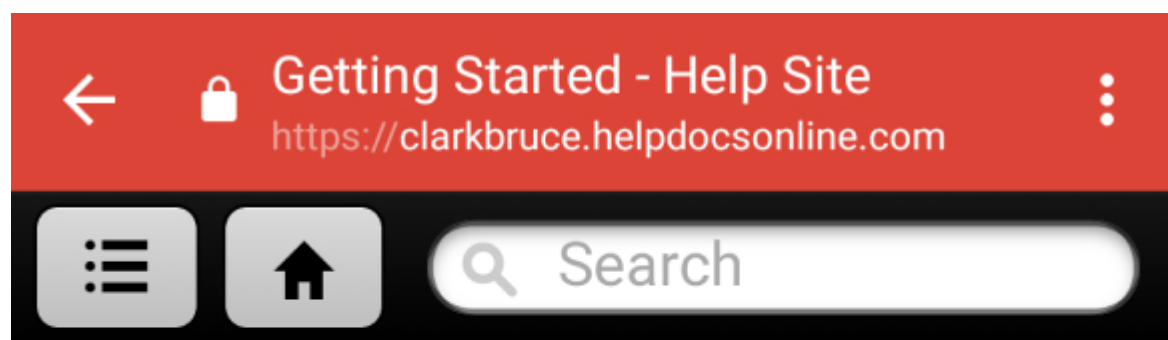
Viewing Device  is  Phone 

Then Hide the page 

3: Here's a preview of the site on a Mobile device: The page on which restrictions were set up is not visible in the menu.



## Getting Started

[Value and Philosophy](#)

[Mission Statement](#)

[Objectives](#)

[Founders](#)

[Achievements](#)

### Who can use Conditional Content?

Conditional logic can be used by:

- **Administrator** - The administrator can access all features and the Settings section of the application.
- **Editor** - The administrator can add a user as an Editor for a help site. The Editor can create and publish content in your help site. The Editor can also set conditional logic of folders and pages in your help site but cannot access the Settings section of the application.

### How to use Conditional Content?

Conditional content can be used to set up restrictions to folders, pages, and specific content on

a page. You can set up restrictions separately every time you need to restrict viewing based upon a condition, or you can set up [Rule Sets](#) and use them whenever you feel the need to restrict a folder, page, or specific content on a page.

The conditions are further described in detail for specific restrictions:

- [Folder Restrictions](#)
- [Page Restrictions](#)
- [Content Restrictions](#)

## Rule Sets

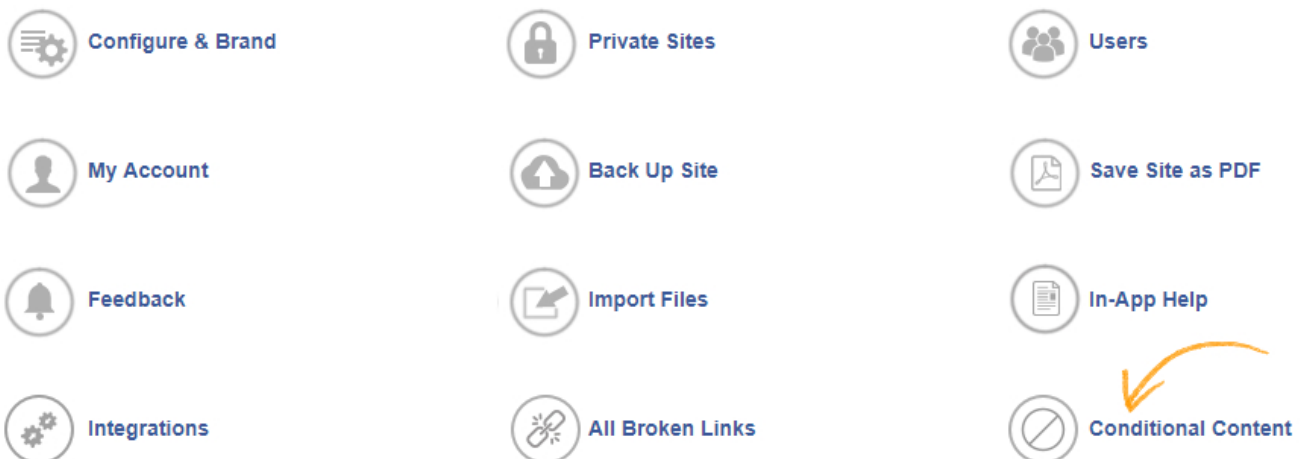
You can create rule sets, which can be instantly applied to one or many sites. For instance, you may want to restrict your customers from viewing certain folders, when they access your knowledge base from their mobiles. Similarly, you can also create rule sets for page and content level restrictions.

**Tip\*** You can also create conditions for each folder, page or content separately. By applying **rule sets**, you can save time and effort.

**Step 1:** Navigate to "Settings" -----> "Conditional Content"

### Settings

Setup and control your account



**Step 2:** Click "New Rule Set."



**Step 3:** Enter name, description, select the condition from the drop-down menu, select action- 'Hide the content' or 'Show the content.' Click "Save" to secure the rule set.



### Show or hide based on conditional logic

For example, you can set up a rule to make this page visible just for 'user role = administrator'. Keep repeating yourself? You can create conditional rule sets that you can easily apply to any page for folder.

[Learn more](#) about conditional content

\* Name:

Rule set 1

Description:

Hiding folders

Sharing:

☒ Share rule set between all sites

If Any of the following match:

Then

- Media output
- Viewing Device
- Site Language
- URL Parameter
- SSO Parameter
- User Group
- Contextual Help
- Member Group

Add condition

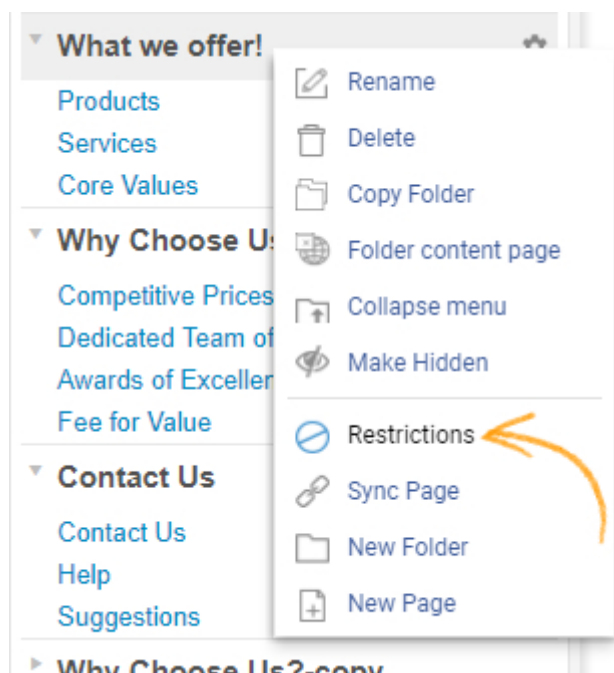


Save

Close

## How to use a Rule Set:

**Step 1:** Open the contextual menu for the folder and click "Restrictions."



**Step 2:** Choose "Show or hide based on conditional logic" and select "Apply a rule set," select the rule set from the drop-down menu and click "Save."

## Folder Restrictions

### Editors

Select user(s)



### Viewers

Select user(s)



### ☒ Show or hide based on conditional logic

For example, let's say you only want it to be visible for users with the 'user role = administrator'. You can setup rules that will enable this. You can [create conditional rule sets](#) that you can easily apply to any page or folder. [Learn more](#)

☐ Enter your own rules using the logic builder

☒ Apply a rule set

Rule Set 1



Save

Close

### Related Articles:

[Folder Restrictions](#)

[Page Restrictions](#)

[Content Snippets](#)

# Security & Restrictions

# ProProfs Knowledgebase Glossary

<b>dd/edit page toolbar</b>	When adding or editing a page, this toolbar is located directly above the page.
<b>Settings</b>	Admins are users who have permission to customize ProProfs. See <a href="#">Roles</a> .
<b>All Pages</b>	This is a table of all the pages for your site.
<b>Company</b>	A company is the entity that signs up for ProProfs. For example, "IBM" or "ABCorp." Corporations purchase ProProfs to create documentation for their end users.
<b>Content editor</b>	The content editor is the tool used to type in content and create documentation. The editor tool functions much like Microsoft Word.
<b>Context menu</b>	When logged in, you can right-click on various elements to edit them. At the Table of Contents, you can right-click on folders and pages to make changes. In the content editor, you can right-click on various elements to edit the properties.
<b>CSS</b>	A CSS file controls the layout and style of a page. Each site will have its CSS file that can be edited.
<b>Custom domain</b>	Rather than using a subdomain such as abcorp.helpdocsonline.com, you can set up and use your own custom domain such as help.mydomain.com. That custom domain will be the URL of the site.
<b>Draft page</b>	A draft page is not visible to the logged-out user, but is visible to the logged-in user, with a unique icon to denote that it is a draft.
<b>Edit locks</b>	To prevent multiple users from overwriting each other, a page will become "locked" when a user is editing it.
<b>Embed page</b>	ProProfs provides the ability to embed help pages in your own web applications and websites. This is often referred to as " <a href="#">contextual help</a> " and saves the end-user from having to browse and locate the help page in ProProfs.
<b>Embed pop-up</b>	You can generate a link that displays a help page in a browser pop-up rather than in ProProfs. The system will generate a small code snippet that users can place on your own website or web application.
<b>End user</b>	End users are the people who are reading the documentation. They do not have login access and can only read the documentation.
<b>Google Analytics code</b>	Your may want insight as to which pages your end-users are viewing. We provide this insight by allowing you to add your Google Analytics tracking code.

<b>Header color</b>	You can change the header background color of the application.
<b>Header image</b>	You can upload your own background image for the application.
<b>Header logo</b>	This logo appears on the upper left-hand side of the application. Companies can upload their own logo.
<b>Image manager</b>	This allows you to manage images, conduct basic file operations on them (such as upload and delete), and insert the images into a page.
<b>Keyword index</b>	The index will contain a list of "indexed" pages. When adding new pages, you can choose whether or not to include the page in the index and specify an index name. The index will list the pages in alphabetical order (ABC).
<b>Lightbox</b>	A lightbox is a JavaScript overlay used to display a page. The system will generate a small code snippet that you can place on your own website or web application to display a help page in a lightbox.
<b>Logged in</b>	Users can create and manage pages when they are logged in.
<b>Logged out</b>	This view of the site is what an end-user sees to read your documentation.
<b>Page</b>	A page is what you create for your end-users to read. Pages can be fully customized using XHTML/CSS.
<b>Page list</b>	This is a grid list of all the pages for your site.
<b>Page link</b>	A page link is a link to another page.
<b>Page status</b>	The status of a page is either "published" (viewable to end users) or "draft" (only viewable to logged-in users)
<b>Permalinks</b>	Permalinks are the Peto individual pages. These URLs never change.
<b>Pretty permalinks</b>	Pretty permalinks are based on the idea that URLs are frequently visible to the people who click them and therefore should describe the page's content and not be filled with incomprehensible numbers.
<b>Published</b>	A published page is visible to a logged-out end-user.
<b>Roles</b>	ProProfs will use the concept of roles for its users. Roles give each company the ability to control and assign what its users can and cannot do in the application.
<b>Site</b>	A site is a unique set of pages. Companies can create more than one site if their subscription plan allows.

<b>Site address URL</b>	This will be the URL of the site. Each site will have its own URL.
<b>Table of contents (TOC)</b>	The table of contents lists folders and pages in a tree format on the left-hand side.
<b>Tabs</b>	Each page opens in an area with tabbed views. You have the option of turning the tabbed view off.
<b>Text page</b>	A page with an icon of a document denotes that the page is a text page. This icon shows up in the TOC tree and search results.
<b>Tooltip</b>	When an end-user hovers the cursor over a link, a tooltip may appear—a small "hover box" with information about the item being hung over. The system will generate a small code snippet users can place on their own website or web application to add a tooltip. Any updates to the content in ProProfs will instantly update your website.
<b>User</b>	This refers to a user at a company who utilizes ProProfs to create and manage documentation. Each user is provided a username and password.
<b>Video page</b>	A page with an icon of a video player is used to denote that the page is a video page. This icon shows up in the TOC tree and search results.
<b>View page toolbar</b>	When a user is logged in and views a page, the toolbar is located directly above the page.

# Sites

# Edit or Delete a Site

You can edit or delete an entire site.

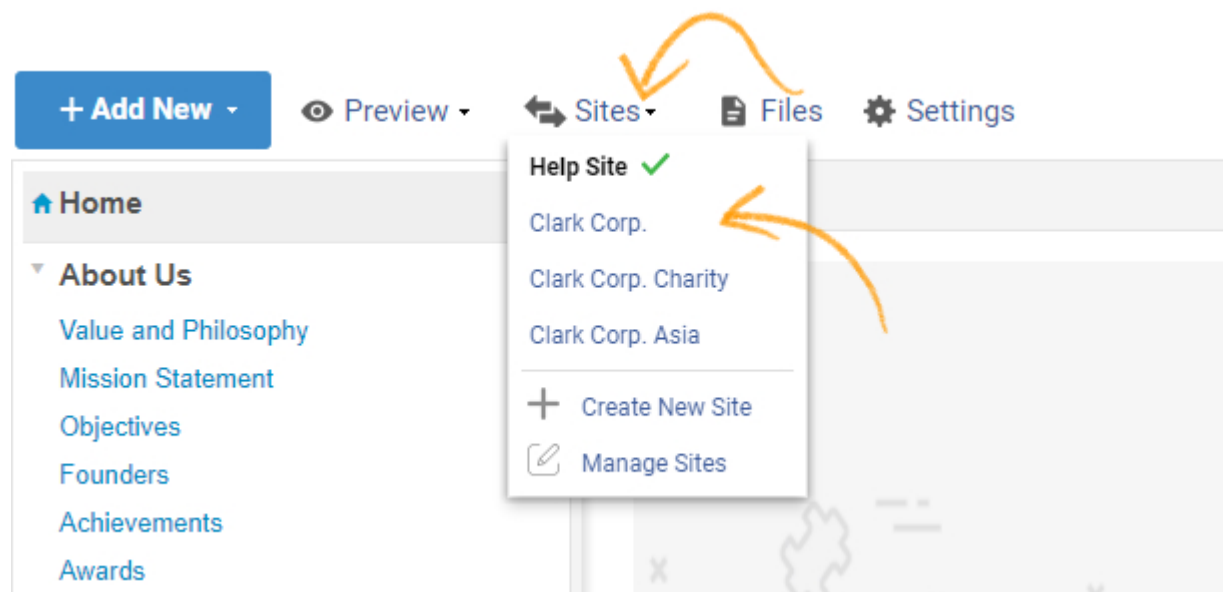
- [Edit a Site](#)
- [Delete a Site](#)

## Edit a Site

To edit the contents of a site:

**Step 1:** Log in to your account as an administrator.

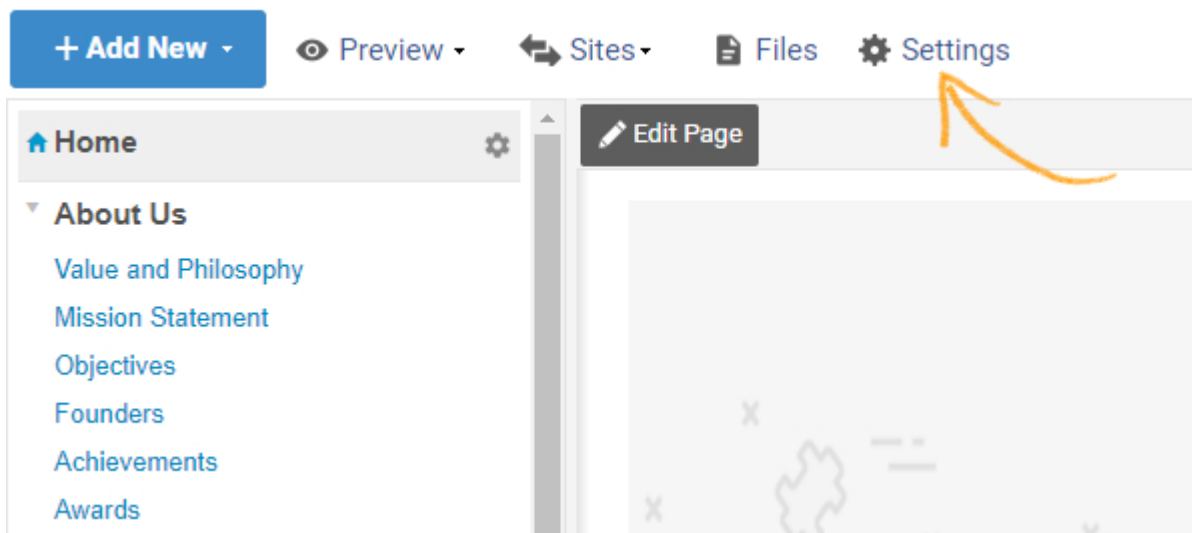
**Step 2:** Click "Sites" to expand the drop-down menu, and select the desired site from the list. To edit the contents of the site follow the guide on [adding and customizing a site](#).



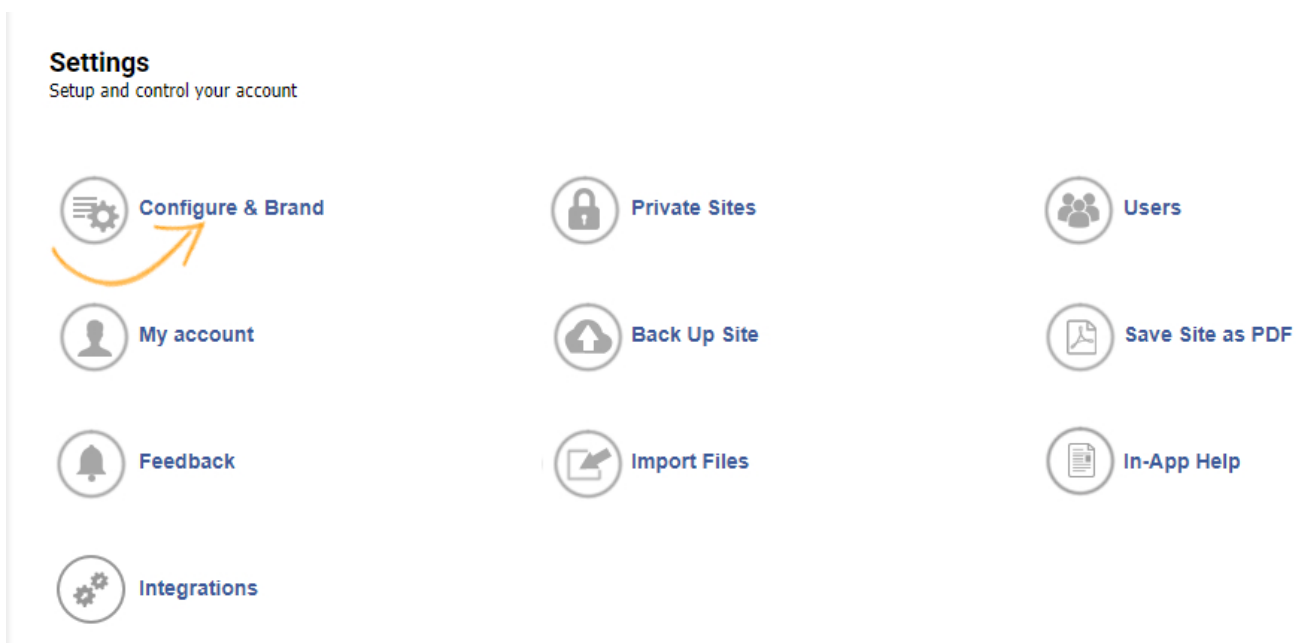
To edit the setup of a site:

**Step 1:** Log in to your account as an administrator and click "Settings."

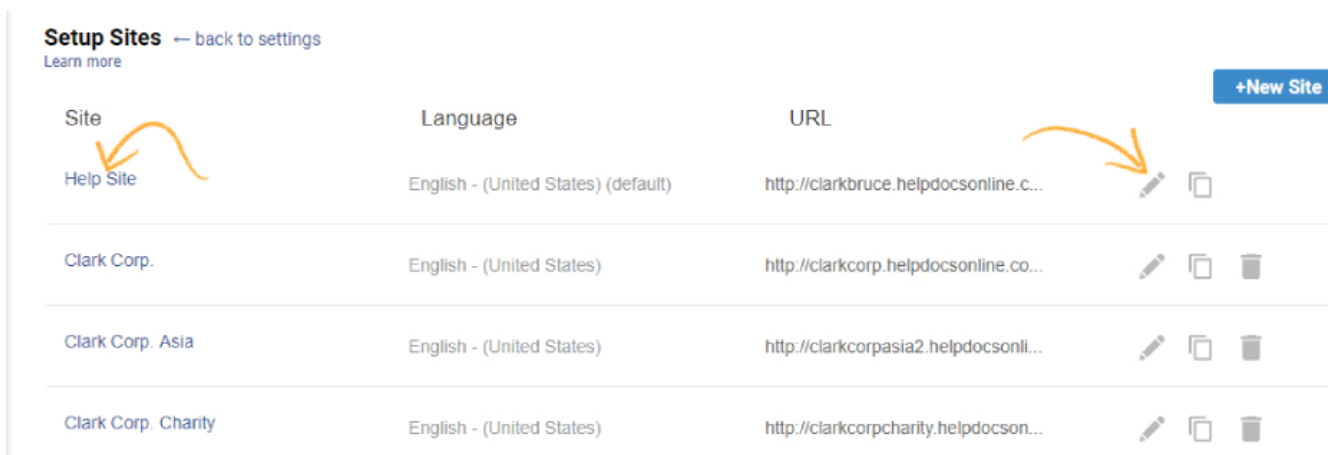




**Step 2:** Click "Configure & Brand."



**Step 3:** Select the site you wish to edit, click on the site name or the respective 'edit button' as shown in the below image.



**Step 4:** Navigate through the site setup options and implement the desired changes. Click "Save" to retain your changes. Follow the guide on [adding and customizing a site](#) for a detailed explanation.

Settings Branding Table of Contents Mobile SEO Search

Language English - (United States) [Learn more](#)

☐ Site is another language of an existing site

Address https://  .helpdocsonline.com  
or [Setup your own domain](#)

Name   
The name of your site and will appear on the web browser title

Home Page

Hide global search box on home page

Breadcrumb

This is an example of how this page will look like.

Home  
http://knowledgebase.helpdocsonline.com  
Help Center  
Search for answers  
Cup, Compass, Wrench, Download icon

## Delete a Site

Deleting a site will **permanently delete** all pages, all CSS, all images, all tooltips, and all data associated with the site. There is no undo function.

To delete a site, please call our support at one of the following helplines:

US - (855) 776-7763

UK - (0808) 189-1027

AU - (1800) 823-195

UAE - (8000) 3570-4334

### Related Articles:

[Add and Customize a Site](#)

[Duplicate/Clone a Site](#)

[Custom Domain](#)

# How to Duplicate a Site

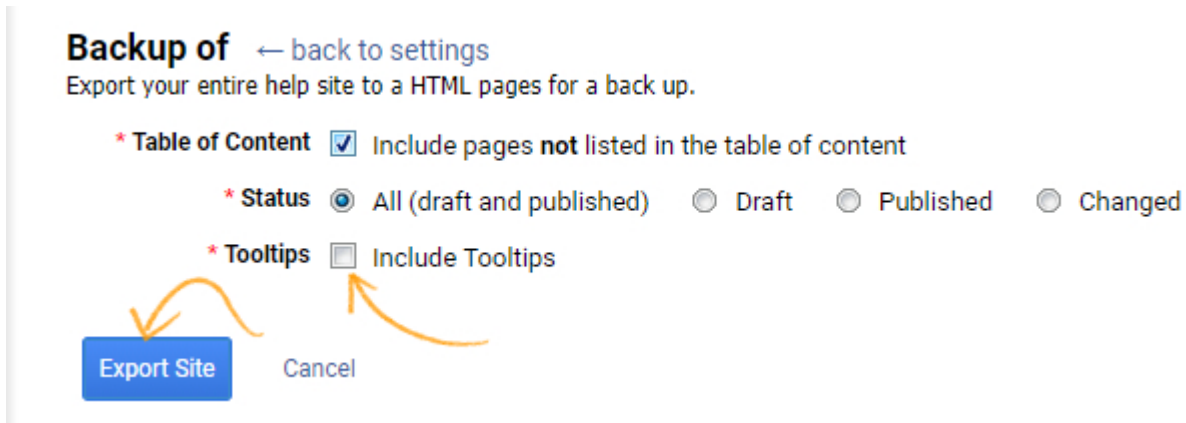
Follow this guide for duplicating an existing site. You may want to duplicate a site if you are creating a similar knowledge base or if you want to translate the site into another language.

However, the site [branding](#) will have to be configured manually for each site.

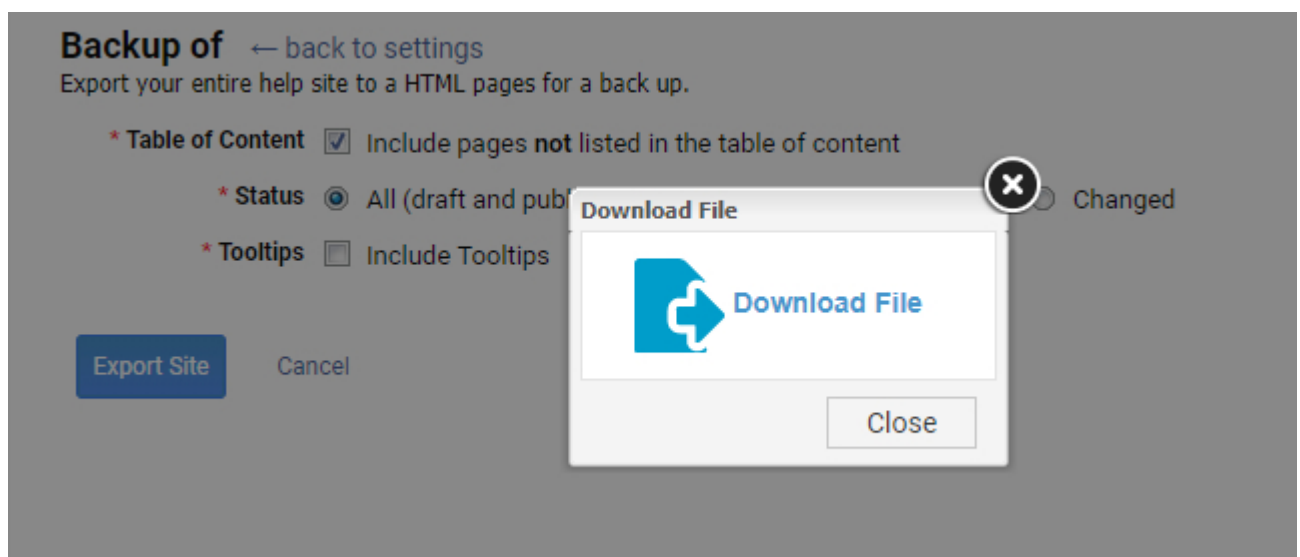
Here are the steps to duplicate a site:

## Step 1 > Export site

1. Log in to your account (as an administrator) and click **Settings**.
2. Select **Back Up Site**.
3. Uncheck **Include Tooltips**.
4. Then click **Export Site** button.



5. You will be prompted to download a zip file. Click on Download File and save it to your computer.




## Step 2 > Create New Site

1. If you haven't created a new site yet, follow these instructions for [adding a new site](#).


## Step 3 > Import Content into New Site

1. Log in to your account (as an administrator) and click **Settings**.
2. Select **Import Files**.
3. Select the new site you created.
4. **Browse** for the zip file.
5. Uncheck **Create a new folder for imported pages**.

### Import [← back to settings](#) Import your HTML files

 Import your HTML pages into ProProfs. If you are migrating from Robohelp or FrameMaker you can export pages as HTML then import it. It is recommend you test a small sample of 5 pages before importing the entire site. [Learn more](#) [hide](#)

**\* File**

Select File:   Max size: 50 mb

Directories to Exclude

Directory names without slashes and separated by commas. All files in these directories will be ignored.

**\* Select Content By** ☒ HTML Tag ☐ Dreamweaver template region

Tag	Attribute	=Value
<input type="text" value="body"/>	<input type="text"/>	<input type="text"/>
<small>The HTML tag, without brackets</small>	<small>Leave blank to use a tag without an attribute, or when the attributes don't matter, such as &lt;body&gt;</small>	<small>Enter the attribute's value (such as width, ID, or class name) without quotes</small>

**\* Other Options** Import page as ☒ Draft ☐ Published

- ☒ Import linked images
- ☒ Update internal links
- ☒ Convert special characters (accents and symbols)
- ☒ Do not import CSS Style  
Check this option if you do not want any CSS to be imported. Imported CSS may override or conflict with your site CSS. Also check this option if you are importing files into the site multiple times since this would add CSS each time you imported resulting in duplicate CSS entries.
- ☒ Remove all inline styles and formatting
- ☒ Create a new folder for imported pages  
Unchecking will put all the imported pages in the root of table of contents
- ☐ Clean up bad (Word, Frontpage) HTML
- ☐ Import TOC names from RoboHelp  
Check this option if you want to replicate TOC names for respective pages from RoboHelp.

**Conflicts** ☒ Create a new page if the page already exists  
☐ Update existing pages with imported pages of the same page title or URL

[Start Import](#) [Cancel](#)

6. Click on **Start Import**.

7. Your pages will be shown in your TOC just like how it was arranged on the original site.

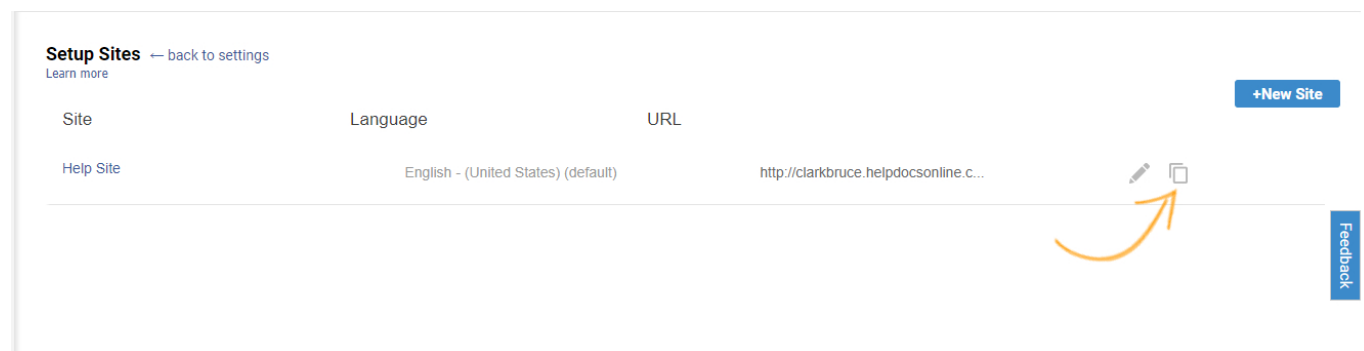
## How to Clone a Site

Follow this guide for cloning an existing site. You may want to clone a site if you are creating a similar knowledge base or if you want to translate the site into another language. However, the site **branding** will have to be configured manually for each site.

Here are the steps to Clone a site.

### Step 1 >

1. Log in to your account (as an administrator) and click **Settings**.
2. Select **Configure and Brand**
3. Click the Clone/Copy Icon, marked by the arrow in the screenshot.



### Step 2 > Copy Site

1. A pop-up will appear, Fill in the desired URL and the name of the Clone site.
2. Select the pages you wish to clone. You can select '**all pages**' or chose specific pages.
3. Click **Create** to complete the process.

**Related Articles:**

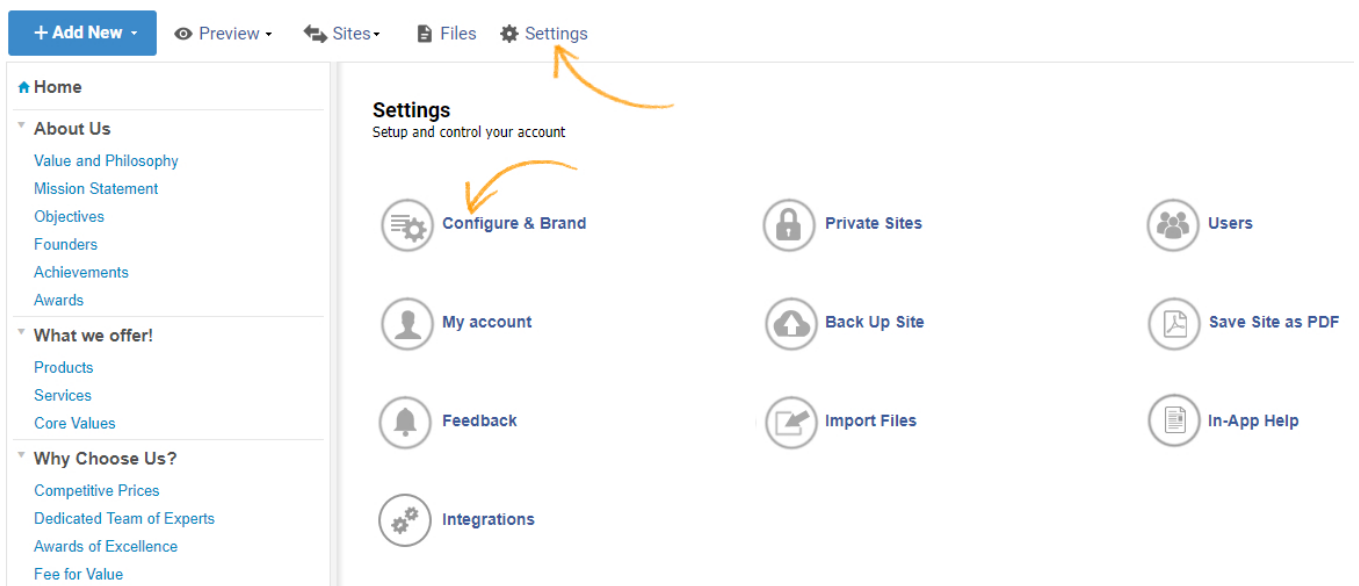
- [Add and Customize a Site](#)
- [Edit or Delete a Site](#)
- [Multiple-Site Search](#)

# Multiple-Site Search

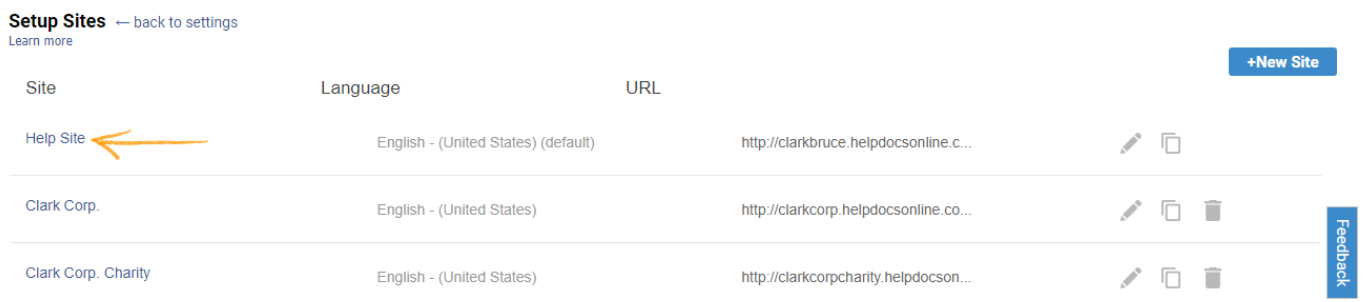
ProProfs Knowledgebase allows you to search content across all of your sites simultaneously. So, if a piece of content is in multiple locations across different sites or you are not sure of the location, you will be able to find it in a jiffy.

**Note:** After you have enabled multiple-site search from settings, users of your Knowledgebase would have the option to search multiple Knowledgebases from the "advanced" search menu. Here's how you can enable multiple-site search:

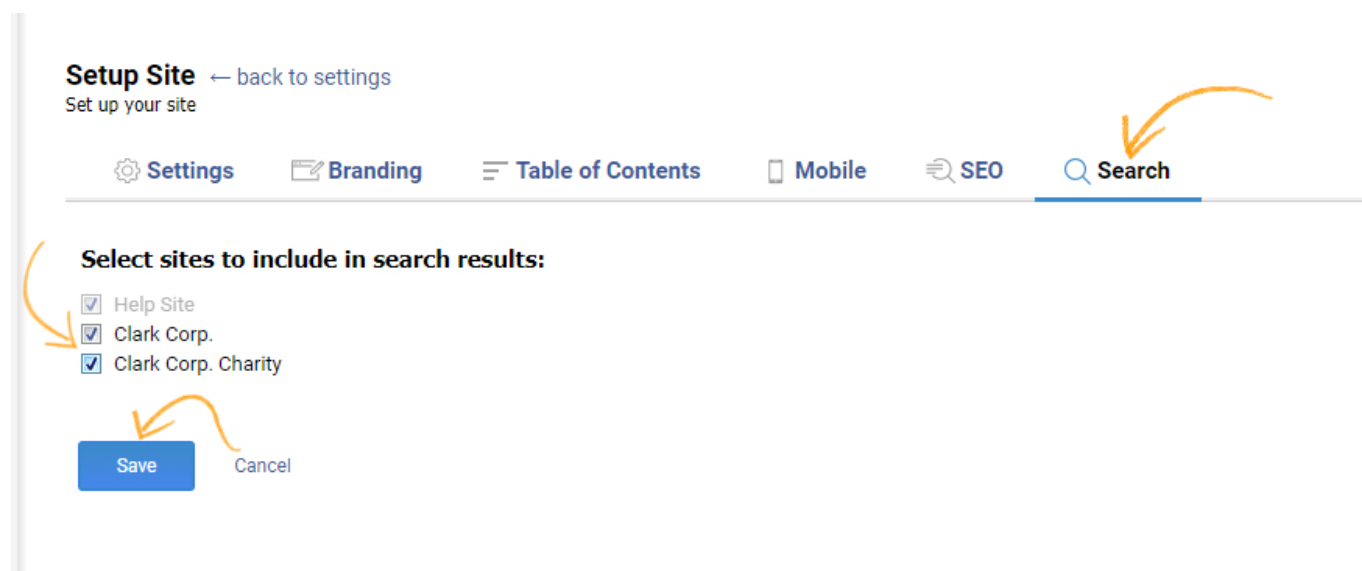
**Step 1:** Click "Settings," then click "Configure & Brand."



**Step 2:** Select a site from the list. Click site name to proceed.

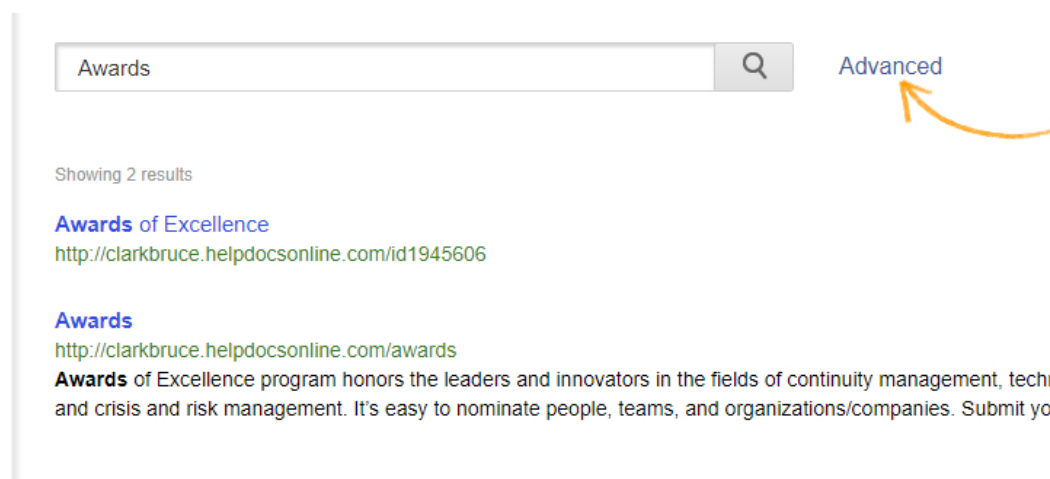


**Step 3:** Site setup loads up. Click "Search" tab and select sites to include in search results. Click "Save" to save the changes.



Here 's how this works for the users:

**Step 1:** Search a keyword. The results will only be from the current site. Click "Advanced" from the results page.



**Step 2:** In "Include results from" section select checkboxes for desired sites. Click "Search" to search multiple sites.



[← Back to main search](#)

Search Includes:  All words ▼

Does Not Include:

Sort by: Relevance ▼

Include results from: ☒ Clark Corp.   
☐ Clark Corp. Charity

 [Search](#)

Here's how multiple-site search results appear:

Include results from: ☒ Clark Corp.  
☐ Clark Corp. Charity

[Search](#)

Showing 3 results

#### [Awards of Excellence](#)

<http://clarkbruce.helpdocsonline.com/id1945606>

#### [Awards](#)

<http://clarkbruce.helpdocsonline.com/awards> 

**Awards** of Excellence program honors the leaders and innovators in the fields of continuity management, technology recovery, and crisis and risk management. It's easy to nominate people, teams, and organizations/companies. Submit your nomination...

#### [Awards](#)

<http://clarkcorp.helpdocsonline.com/awards> 

**Awards** of Excellence program honors the leaders and innovators in the fields of continuity management, technology recovery, and crisis and risk management. It's easy to nominate people, teams, and organizations/companies. Submit your nomination...

**Suggested Reading:** [Search Engines\(Google\)](#)

These keywords cannot be used as a Title URL's as they are being already used for our internal pages:

<https://yourcompanyname.helpdocsonline.com/access>

<https://yourcompanyname.helpdocsonline.com/admin>

<https://yourcompanyname.helpdocsonline.com/build>

<https://yourcompanyname.helpdocsonline.com/ckfinder>

<https://yourcompanyname.helpdocsonline.com/company>

<https://yourcompanyname.helpdocsonline.com/component>

<https://yourcompanyname.helpdocsonline.com/crocodoc>

<https://yourcompanyname.helpdocsonline.com/cron>

<https://yourcompanyname.helpdocsonline.com/download>

<https://yourcompanyname.helpdocsonline.com/email>

<https://yourcompanyname.helpdocsonline.com/export>

<https://yourcompanyname.helpdocsonline.com/folder>

<https://yourcompanyname.helpdocsonline.com/group>

<https://yourcompanyname.helpdocsonline.com/help>

<https://yourcompanyname.helpdocsonline.com/jira>

<https://yourcompanyname.helpdocsonline.com/login>

<https://yourcompanyname.helpdocsonline.com/main>

<https://yourcompanyname.helpdocsonline.com/mobile>

<https://yourcompanyname.helpdocsonline.com/option>

<https://yourcompanyname.helpdocsonline.com/plan>

<https://yourcompanyname.helpdocsonline.com/plugins>

<https://yourcompanyname.helpdocsonline.com/purchase>

<https://yourcompanyname.helpdocsonline.com/register>

<https://yourcompanyname.helpdocsonline.com/signup>

<https://yourcompanyname.helpdocsonline.com/restrict>

<https://yourcompanyname.helpdocsonline.com/search>

<https://yourcompanyname.helpdocsonline.com/tcss>

[https://yourcompanyname.helpdocsonline.com/\*\*tooltip\*\*](https://yourcompanyname.helpdocsonline.com/<b>tooltip</b>)

[https://yourcompanyname.helpdocsonline.com/\*\*topic\*\*](https://yourcompanyname.helpdocsonline.com/<b>topic</b>)

[https://yourcompanyname.helpdocsonline.com/\*\*user\*\*](https://yourcompanyname.helpdocsonline.com/<b>user</b>)

[https://yourcompanyname.helpdocsonline.com/\*\*util\*\*](https://yourcompanyname.helpdocsonline.com/<b>util</b>)

[https://yourcompanyname.helpdocsonline.com/\*\*video\*\*](https://yourcompanyname.helpdocsonline.com/<b>video</b>)

[https://yourcompanyname.helpdocsonline.com/\*\*class\*\*](https://yourcompanyname.helpdocsonline.com/<b>class</b>)

[https://yourcompanyname.helpdocsonline.com/\*\*constructor\*\*](https://yourcompanyname.helpdocsonline.com/<b>constructor</b>)

[https://yourcompanyname.helpdocsonline.com/\*\*function\*\*](https://yourcompanyname.helpdocsonline.com/<b>function</b>)

[https://yourcompanyname.helpdocsonline.com/\*\*static\*\*](https://yourcompanyname.helpdocsonline.com/<b>static</b>)

# Account and Billing

# Purchasing ProProfs Knowledgebase

If you've never used ProProfs before, you can get started by [selecting a plan](#), that suits you best, on our pricing page.

## Some pointers:

- ProProfs has different pricing plans to suit your business.
- After you select a plan, enter in your billing information.
- Review and click submit. Your account will instantly be activated.
- You will receive an email invoice. You will also receive an email invoice each time you are billed.
- You can [cancel](#) or [upgrade/downgrade](#) your account at anytime.

## What is a Knowledge Base and How it Works

Video About: [What is a Knowledge Base and How it Works](#)

**Suggested Readings:** [Upgrade or Downgrade your Plan](#)

# Upgrade or Downgrade Your Plan

We make it easy to move between subscription plans, to upgrade or downgrade, at any time. All upgrades are billed the prorated amount.

## Benefits of upgrading your current plan:

- Increase your productivity by adding more members.

## Benefits of downgrading your current plan:

- Save on your expenses.

## To Upgrade or Downgrade Your Plan:

1) Click on the **"Upgrade"** button located at the top of the page after creating a new account.



### For Public Help Center,

- Select the **plan** you want to opt for and click **"Pay Now."**



**NOTE:** You can select the no. of authors if you choose the PREMIUM plan.

### For Private Knowledge Base,

- Select the no. of users.
- Select the plan you wish to opt for and click "Pay Now."



**NOTE:** For the ENTERPRISE plan, click "View Pricing."

*After the successful payment, your new plan will be reflected in your account.*

*That is all about upgrading or downgrading your plan.*

## Related Articles:

- [Cancel Your Account](#)
- [Update Your Credit Card Information](#)

- [How to Log in and out of ProProfs Knowledgebase](#)

# Cancel Your Account

To cancel your account, follow these steps:

1. Log in to your ProProfs account at <http://www.proprofskb.com/login/>
2. Click **Settings**.
3. Click **My Account**.

## Settings

Setup and control your account



Configure & Brand



Private Sites



Users



My account



Back Up Site



Save Site as PDF



Feedback



Import Files



In-App Help



Integrations

4. Click **Cancel Account**.



Home Settings x

## Manage Account [← back to settings](#)

[Learn more](#)

**Account ID** 11555

**Company Name** clarkbruce

**Web Site**

[Edit](#)

---

**Plan** Business 3 year 500pages (Contact [billing@proprofs.com](mailto:billing@proprofs.com) for changes)

**Status** Active subscription

**Users** 4 of 200

**Pages** 65 of 500

**Sites** 4 of 5

**Storage** 216KB (0%) of 1GB

**View invoices** [Click here](#)

**Change credit card** [Click here](#)

**Cancel account** [Click here](#)

5. A new screen will open. Click **Continue Anyway**.



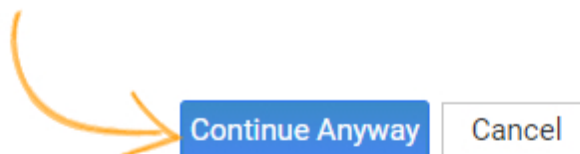
## Need to Cancel Your ProProfs Membership?

**Bummer**, we really like having you as a Member. You've got so much cool content & data saved in ProProfs that we need to warn you that if you cancel:

**You'll Lose Your Content & Data:** You will lose access to all of your saved, historical content and data upon cancellation and ProProfs will permanently delete it in the normal course of business operations (usually 15-20 days after cancellation). You can always join up again, but what's gone will be gone for good.

**Note\*** If you cancel the service before the end of your current paid-up subscription period, your cancellation will take effect immediately and you will not be charged again. If you still want to say goodbye, we won't bill you again, but you'll still be responsible for any charges already incurred.

I understand that all of my content and data such as webpages and reports will vanish into the ether and I won't be able to get it back, even if I ask really nicely:



Your account will be canceled on the date indicated.

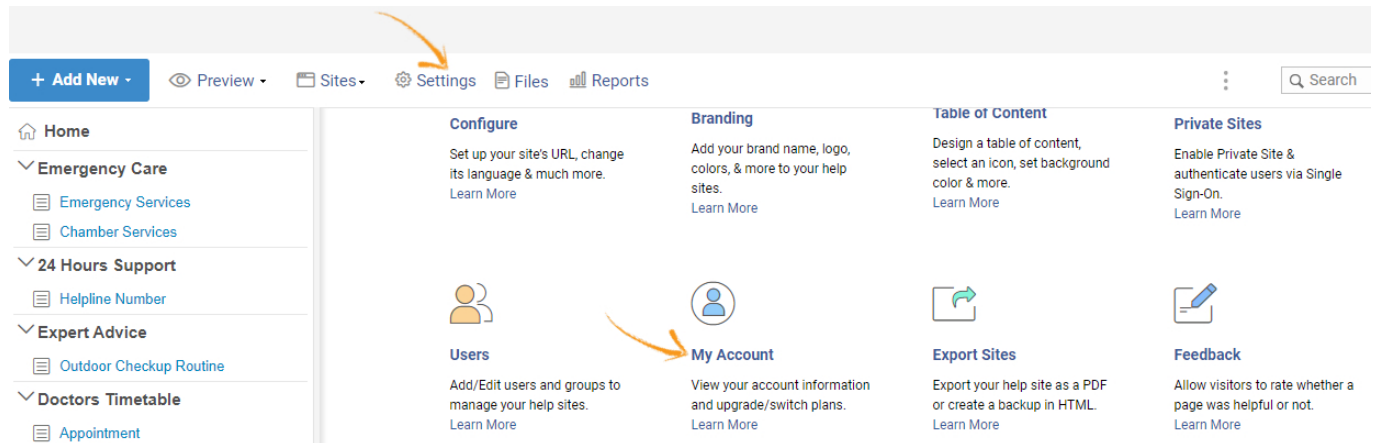
There is no undo function for a cancellation. **Once your account is canceled, all of your site information will be permanently deleted.**

**Suggested Readings:** [Upgrade or Downgrade your Plan](#)

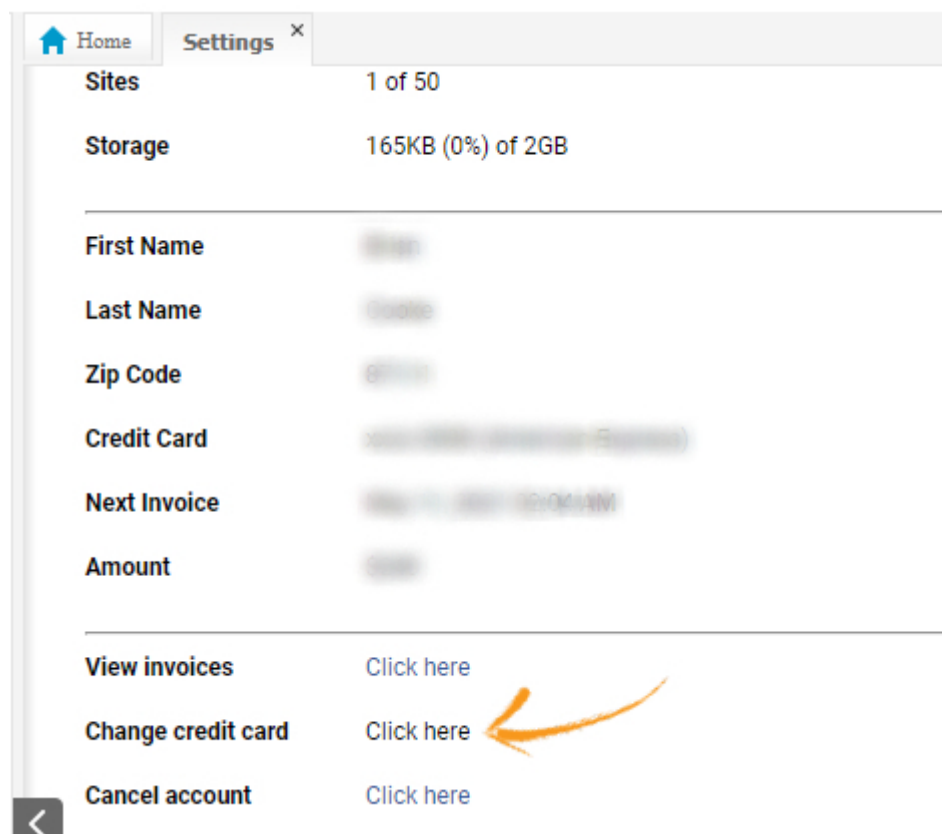
# Update Your Credit Card Information

To update your credit card information, follow these steps:

**Step 1:** On your ProProfs Chat dashboard, go to **Settings >> My Account**.



**Step 2:** Locate the option Change credit card and access it.



**Step 3:** Enter the new billing information and save. The new credit card will be billed from here on.

## Billing Information

---

### Payment Method

Credit Card ▾

### Company Name

### First Name \*

### Last Name \*

### Phone Number

### Credit Card Number

### Expiration Date

06 June ▾

2011 ▾

### CW

XXX

### Street Address 1 \*

### Street Address 2

Suggested Readings: [Invoices](#)

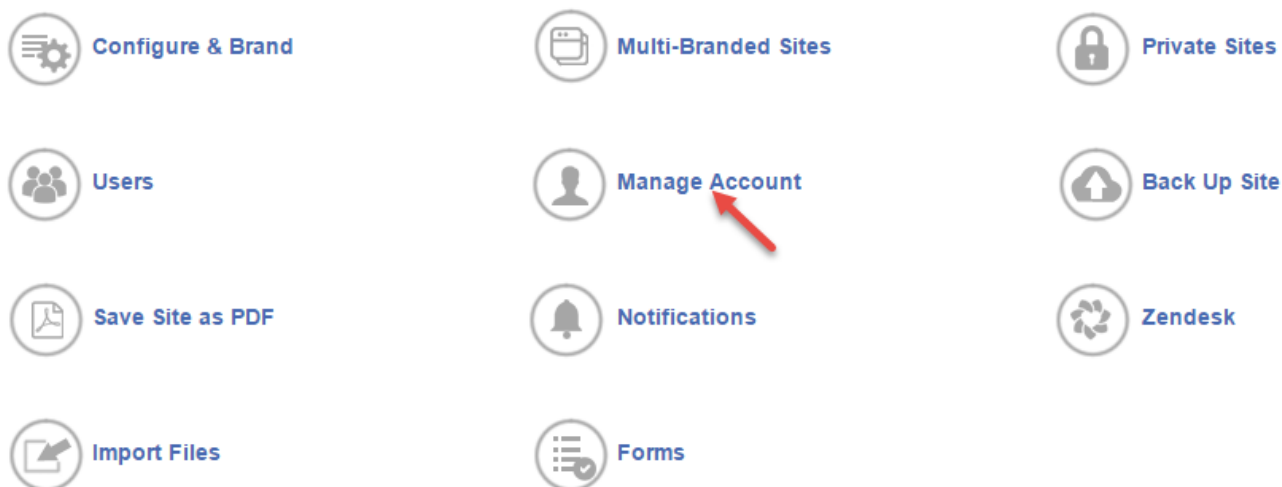
# Access invoices

If at any time you need copies of your invoices follow this step:

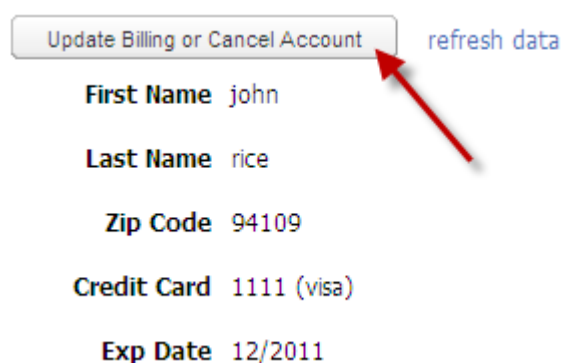
1. Log in to your ProProfs account at <http://www.proprofskb.com/login/>
2. Click **Settings**.
3. Click **Manage Account**.

## Settings




Setup and control your account



4. Click **Update Billing or Cancel Account**.



5. A new screen will open. On the bottom of the screen will be a section for all your past invoices

Invoices				
	Invoice Number	Date	Total	
	<a href="#">3680</a>	February 27, 2014		<a href="#">details</a>
	<a href="#">3504</a>	January 27, 2014		<a href="#">details</a>
	<a href="#">3334</a>	December 27, 2013		<a href="#">details</a>
	<a href="#">3163</a>	November 27, 2013		<a href="#">details</a>

# How to Log in and out of ProProfs Knowledgebase

## Log in

To log in to ProProfs you must have a valid login including a username and password. Your administrator must first add you as a user of the application. To log in to the system:

1. **Enter the URL** <https://www.proprofskb.com/login/>

The login window displays on this page. If the login screen does not display, verify that you have typed the URL correctly.

2. **Enter your username and password.**

If you cannot log in, take one of the following actions:

- Verify that the username and password are correct, including any capital letters. If you have forgotten your password, see Retrieving forgotten or lost passwords
- Verify with your administrator that you have the correct username and password.
- Contact your system administrator to ensure that your account has not been disabled.

3. Click **Login**.

## Log-Out

Click the **log-out** link located at the top right of every screen. If you are using [your own custom header](#), you will need to include the {login} variable where you want the log-in/log-out link to appear.

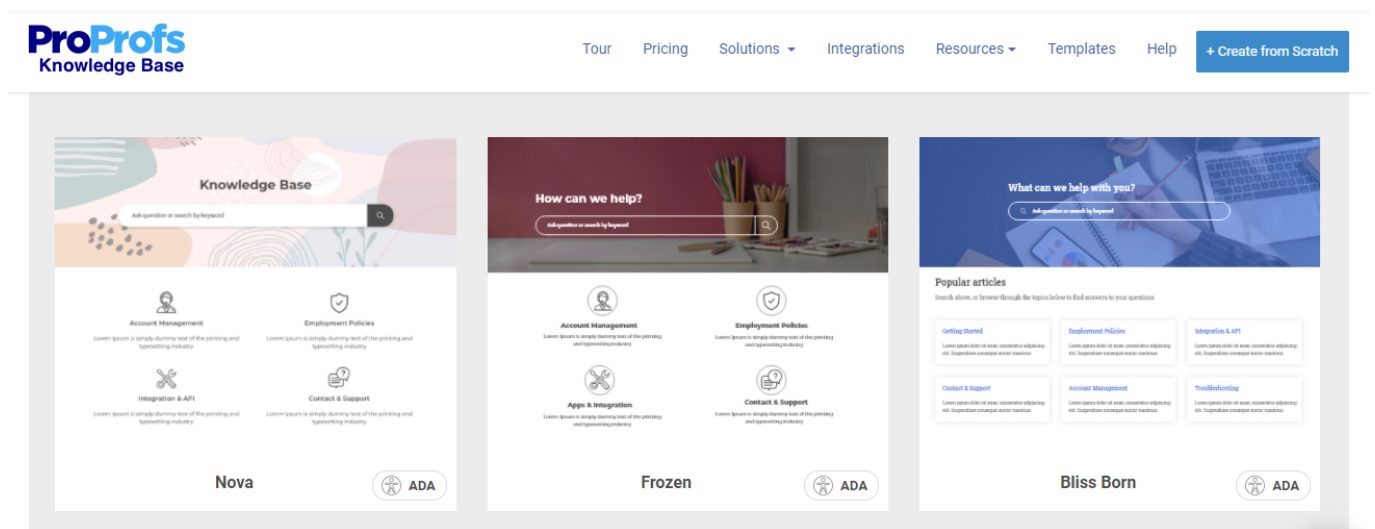
**Suggested Reading:** [How to Create a Knowledge Base](#)

# ProProfs Knowledge Base: Commitment to Accessibility

ProProfs is committed to making its software as accessible as possible to people with special needs, including those with visual, hearing, cognitive, and motor impairments. We're continually working towards improving our software accessibility to ensure we provide equal access to all our users.

## Conformance Standards

We always make sure that the **ProProfs Knowledge Base** is simple and easy to use for everyone regardless of their physical capabilities. Our Knowledge Base templates are designed to support **ADA** requirements and they are compatible with **section 508**. This is highlighted by the ADA labeling on all our Knowledge Base templates, as shown in the screenshot below.



## What is the ADA?

**ADA** stands for the **Americans with Disabilities Act**. It is a civil rights law ensuring that people with disabilities are entitled to equal rights and opportunities as everyone else. ADA further forbids any discrimination against people with disabilities in all the areas available for the general public, including schools, jobs, transportation, etc.

We also continuously work on keeping our website simple and easy to use for all our users. The **Web Content Accessibility Guidelines (WCAG)** defines requirements to make web content more accessible to a wider range of users, including people with disabilities.

ProPorfs has a robust review process in place that includes a systematic examination of our website's accessibility, allowing us to make improvements and adjustments, as needed, in accordance with the **WCAG 2.1 Level AA**.

### Related Articles:

[How to Create a Knowledge Base](#)



[How to Create Multi Branding Help Site](#)

[Guide to \(WYSIWYG\) Editor](#)

# Drafts

# View, Edit, and Delete Tooltips

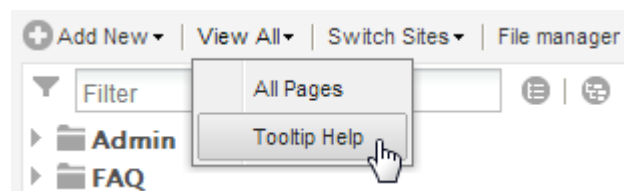
The Tooltip Help button opens a table of all tooltips and provides tools to manage them. From the table, you can view, edit, and delete tooltips. You can also search to find tooltips quickly.

- [View All Tooltips](#)
- [Toolbar](#)
- [Search](#)
- [Table Columns](#)
- [Edit Tooltips](#)
- [Delete Tooltips](#)

+ New Tooltip   Delete			
<input type="checkbox"/>	Tooltip Name	Description	Preview
<input type="checkbox"/>	dba		<a href="#">View</a>
<input type="checkbox"/>	cvv	The CVV Number ("Card...	<a href="#">View</a>
<input type="checkbox"/>	Finibus Bonorum		<a href="#">View</a>
<input type="checkbox"/>	Lorum Ipsum		<a href="#">View</a>
<input type="checkbox"/>	business phone	the main business teleph...	<a href="#">View</a>
<input type="checkbox"/>	email	why we need email	<a href="#">View</a>
<input type="checkbox"/>	web site	link to web site	<a href="#">View</a>
<input type="checkbox"/>	EIN	An Federal Tax Identific...	<a href="#">View</a>
<input type="checkbox"/>	monthly spend		<a href="#">View</a>
<input type="checkbox"/>	Simple tooltip	this is a description of th...	<a href="#">View</a>

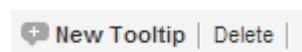
## View All Tooltips

To view all tooltips, do the following:



- Click on **Tooltip Help** in the main toolbar.

## Toolbar



- **New Tooltip** - This button will display options for you to create a new tooltip.
- **Delete** - This button will delete tooltips that you have selected by checking them. No trash can exists for tooltips. Deleting tooltips will permanently delete them.

## Search

Above the table of tooltips, on the right-hand side, is a search box where you can enter words to search in the tooltips. The table will refresh to display all tooltips matching your search words.

To clear a search, press the **X** icon in the search box.

## Table Columns

The table of tooltips contains the following columns:

- **[]** – This check box, when clicked (checked), selects that particular tooltip to be deleted.
- **Tooltip Name** - Clicking the name of a tooltip will open the tooltip in the window used to create it. Here you can edit it and save the changes. ProProfs will instantly update those changes to the tooltip on your website.
- **Description** - This column offers a description of the tooltip.
- **Preview** - Hovering the mouse cursor over the word **View** will preview that tooltip as your users will see it.
- **Date** - This column shows the date the tooltip was first created or the date the tooltip was last modified. The table will be sorted from newest to oldest by default.

## Edit Tooltips

To edit a tooltip, click on the tooltip name in the table of tooltips. The tooltip will open in the same window used to create it. Here you can edit it and save the changes.

## Delete Tooltips

The delete function in the table of tooltips allows you to delete one or more tooltips you select in the table.

To delete one or more tooltips, do the following:

- **Select the tooltip**- To select a tooltip, click the check box to the left of the tooltip name. To select multiple tooltips, keep selecting more tooltips by checking their respective check boxes.

- **Select all tooltips in the table** - All tooltips in the table can be selected by checking the check box in the table header (on the left-hand side of Tooltip Name). Unchecking this same header check box will cause all tooltips in the table to be unchecked (NOT selected).
- **Click Delete in the toolbar** - This button will delete all the selected tooltips.

**Note:** Your user role will determine whether or not you are able delete tooltips.

**Suggested Reading:** [Create a Tooltip](#)