# Table of Contents

Getting Started ........................................................................................................ 1

Creating a Knowledge Base | ProProfs Knowledge Base Help Center ......................... 2
How to Add, Edit, and Delete a User ........................................................................ 5
Dashboard Overview ................................................................................................. 10
Tour Videos .............................................................................................................. 16

Create a Stunning Knowledge Base ............................................................................. 17
Design Your Knowledge Base ..................................................................................... 18
Configure Your Knowledge Base Settings ..................................................................... 19
Improve Collaboration .................................................................................................. 20
Analyze Your Knowledge Base Reports ......................................................................... 21
Create Online Documentation ..................................................................................... 22
Create Internal Knowledge Base .................................................................................. 23

Create Your Company Logo .......................................................................................... 24
Customize Your Homepage .......................................................................................... 27
Add, Edit, and Delete a Page ......................................................................................... 39
Add, Copy and Delete a Folder ..................................................................................... 43
Add a Sync Page .......................................................................................................... 48
Create a Tooltip ........................................................................................................... 55
Add Content Snippets .................................................................................................... 64
Add Toggle Content ....................................................................................................... 69
Add Merge Tags ............................................................................................................. 73

Content Management .................................................................................................. 81
Create a new Help Site .................................................................................................. 82
Create Multi Branding Help Site .................................................................................. 83
View Pages .................................................................................................................. 86

Guide to (WYSIWYG) Editor ......................................................................................... 91
Supported File Types ..................................................................................................... 106
Revision History ........................................................................................................... 107
Page Restrictions .......................................................................................................... 110
Folder Restrictions ....................................................................................................... 121
Callouts ......................................................................................................................... 130

Table of Contents (Side Menu) ..................................................................................... 132

Overview .................................................................................................................... 133
Pages ............................................................................................................................ 137
Links ............................................................................................................................. 140

Add a Lightbox ............................................................................................................ 143
Add a Popup .................................................................................................................. 149
Working With Images .................................................................................................. 154
Tables ........................................................................................................................... 163

Links ............................................................................................................................. 170
Lists ............................................................................................................................... 178
Videos ........................................................................................................................... 181
CSS ............................................................................................................................... 185

Basic Overview ............................................................................................................ 191
How to Use Single Sourcing ....................................................................................... 192
Logged in vs. Logged out ............................................................................................ 194
<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>195</td>
</tr>
<tr>
<td>Keyword Index</td>
<td>200</td>
</tr>
<tr>
<td>Tabs</td>
<td>204</td>
</tr>
<tr>
<td>Password Reset</td>
<td>207</td>
</tr>
<tr>
<td>Pages</td>
<td>209</td>
</tr>
<tr>
<td>Recover a Deleted Page</td>
<td>210</td>
</tr>
<tr>
<td>Feedback and Ratings</td>
<td>212</td>
</tr>
<tr>
<td>Editing Content</td>
<td>216</td>
</tr>
<tr>
<td>File &amp; Image Manager</td>
<td>217</td>
</tr>
<tr>
<td>PDF</td>
<td>223</td>
</tr>
<tr>
<td>Advanced Search</td>
<td>224</td>
</tr>
<tr>
<td>How to Add URL to Folders</td>
<td>228</td>
</tr>
<tr>
<td>How to Copy a Folder Within and Across Knowledge-Bases</td>
<td>230</td>
</tr>
<tr>
<td>Troubleshooting Web Browsers</td>
<td>235</td>
</tr>
<tr>
<td>Settings</td>
<td>237</td>
</tr>
<tr>
<td>Add and Customize a Site</td>
<td>238</td>
</tr>
<tr>
<td>Custom Domain</td>
<td>250</td>
</tr>
<tr>
<td>White Label</td>
<td>254</td>
</tr>
<tr>
<td>Table of Contents</td>
<td>255</td>
</tr>
<tr>
<td>Permanent URL Redirection</td>
<td>269</td>
</tr>
<tr>
<td>Search Engines (Google)</td>
<td>274</td>
</tr>
<tr>
<td>Google Webmaster Tools</td>
<td>283</td>
</tr>
<tr>
<td>Bing Webmaster Tools</td>
<td>286</td>
</tr>
<tr>
<td>Private Sites &amp; Single Sign-On</td>
<td>289</td>
</tr>
<tr>
<td>Private Sites</td>
<td>290</td>
</tr>
<tr>
<td>Restricting Site Access Using IP Restrictions</td>
<td>293</td>
</tr>
<tr>
<td>Single Sign-On</td>
<td>295</td>
</tr>
<tr>
<td>JWT Single Sign-On</td>
<td>305</td>
</tr>
<tr>
<td>User Management</td>
<td>308</td>
</tr>
<tr>
<td>Add, Edit, Delete Users</td>
<td>309</td>
</tr>
<tr>
<td>Roles &amp; Permissions</td>
<td>313</td>
</tr>
<tr>
<td>Workflow Rules</td>
<td>315</td>
</tr>
<tr>
<td>Member Manager</td>
<td>319</td>
</tr>
<tr>
<td>My Account</td>
<td>331</td>
</tr>
<tr>
<td>Import &amp; Export</td>
<td>334</td>
</tr>
<tr>
<td>Import Data From Zendesk</td>
<td>335</td>
</tr>
<tr>
<td>Import From Madcap Flare</td>
<td>341</td>
</tr>
<tr>
<td>Import PowerPoint (PPT)</td>
<td>342</td>
</tr>
<tr>
<td>Import From PDF</td>
<td>343</td>
</tr>
<tr>
<td>Mobile &amp; Tablet</td>
<td>346</td>
</tr>
<tr>
<td>Page Footer</td>
<td>347</td>
</tr>
<tr>
<td>In-App Help Widget</td>
<td>354</td>
</tr>
<tr>
<td>ProProfs Knowledge Base Integrations</td>
<td>358</td>
</tr>
<tr>
<td>Forms</td>
<td>359</td>
</tr>
<tr>
<td>Salesforce</td>
<td>360</td>
</tr>
<tr>
<td>Freshdesk</td>
<td>369</td>
</tr>
<tr>
<td>Custom Form</td>
<td>378</td>
</tr>
<tr>
<td>Zendesk</td>
<td>383</td>
</tr>
<tr>
<td>Zendesk Integration with ProProfs Knowledge Base</td>
<td>384</td>
</tr>
<tr>
<td>Topic</td>
<td>Page</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Zendesk Agent App</td>
<td>389</td>
</tr>
<tr>
<td>Zendesk Help Center Integration With ProProfs Knowledge Base</td>
<td>391</td>
</tr>
<tr>
<td>Zendesk Classic</td>
<td>397</td>
</tr>
<tr>
<td>Agent Interface</td>
<td>398</td>
</tr>
<tr>
<td>Search Widget</td>
<td>399</td>
</tr>
<tr>
<td>Post Ticket Widget</td>
<td>406</td>
</tr>
<tr>
<td>Web Portal</td>
<td>413</td>
</tr>
<tr>
<td>Documentation Tab</td>
<td>414</td>
</tr>
<tr>
<td>Zendesk Header</td>
<td>419</td>
</tr>
<tr>
<td>Forum Search</td>
<td>422</td>
</tr>
<tr>
<td>Restricting Access</td>
<td>426</td>
</tr>
<tr>
<td>Zendesk Support Widget</td>
<td>431</td>
</tr>
<tr>
<td>Zendesk Single Sign-On</td>
<td>440</td>
</tr>
<tr>
<td>API</td>
<td>441</td>
</tr>
<tr>
<td>Create &amp; Delete a User API</td>
<td>442</td>
</tr>
<tr>
<td>Desk.com Integration With ProProfs Knowledge Base</td>
<td>446</td>
</tr>
<tr>
<td>Google Analytics Integration With ProProfs Knowledge Base</td>
<td>457</td>
</tr>
<tr>
<td>Google Fonts Integration With ProProfs Knowledge Base</td>
<td>468</td>
</tr>
<tr>
<td>Google Translate Integration With ProProfs Knowledge Base</td>
<td>471</td>
</tr>
<tr>
<td>LiveChat Integration With ProProfs Knowledge Base</td>
<td>476</td>
</tr>
<tr>
<td>Olark Live Chat Integration With ProProfs Knowledge Base</td>
<td>480</td>
</tr>
<tr>
<td>TidioChat Integration with ProProfs Knowledge Base</td>
<td>483</td>
</tr>
<tr>
<td>SnapEngage Chat Integration With ProProfs Knowledge Base</td>
<td>487</td>
</tr>
<tr>
<td>Wufoo Forms Integration With ProProfs Knowledge Base</td>
<td>491</td>
</tr>
<tr>
<td>JIRA integration With ProProfs Knowledge Base</td>
<td>496</td>
</tr>
<tr>
<td>Disqus Integration with ProProfs Knowledge Base</td>
<td>499</td>
</tr>
<tr>
<td>Yammer Integration With ProProfs Knowledge Base</td>
<td>502</td>
</tr>
<tr>
<td>ProProfs Live Chat Integration With ProProfs Knowledge Base</td>
<td>505</td>
</tr>
<tr>
<td>Slack Integration With ProProfs Knowledge Base</td>
<td>510</td>
</tr>
<tr>
<td>ProProfs Survey Maker Integration With ProProfs Knowledge Base</td>
<td>515</td>
</tr>
<tr>
<td>Okta Integration With ProProfs Knowledge Base</td>
<td>520</td>
</tr>
<tr>
<td>How to Integrate Azure AD With ProProfs Knowledge Base</td>
<td>522</td>
</tr>
<tr>
<td>Reports</td>
<td>527</td>
</tr>
<tr>
<td>Overview of Reports</td>
<td>528</td>
</tr>
<tr>
<td>Summary</td>
<td>529</td>
</tr>
<tr>
<td>Suggestions</td>
<td>536</td>
</tr>
<tr>
<td>Content</td>
<td>540</td>
</tr>
<tr>
<td>Authors</td>
<td>543</td>
</tr>
<tr>
<td>Broken Links</td>
<td>545</td>
</tr>
<tr>
<td>Advanced</td>
<td>547</td>
</tr>
<tr>
<td>GDPR</td>
<td>548</td>
</tr>
<tr>
<td>What is GDPR?</td>
<td>549</td>
</tr>
<tr>
<td>How Does ProProfs Knowledge Base Support Data Portability?</td>
<td>550</td>
</tr>
<tr>
<td>How Do I Delete Users and Their Information?</td>
<td>551</td>
</tr>
<tr>
<td>Contextual Help</td>
<td>552</td>
</tr>
<tr>
<td>Introduction to Contextual Help</td>
<td>553</td>
</tr>
<tr>
<td>View, Edit, and Delete Tooltips</td>
<td>557</td>
</tr>
<tr>
<td>Security &amp; Restrictions</td>
<td>560</td>
</tr>
<tr>
<td>Conditional Content</td>
<td>561</td>
</tr>
<tr>
<td>Section</td>
<td>Page</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Introduction to Conditional Content</td>
<td>562</td>
</tr>
<tr>
<td>ProProfs Knowledgebase Glossary</td>
<td>568</td>
</tr>
<tr>
<td>Sites</td>
<td>571</td>
</tr>
<tr>
<td>Edit or Delete a Site</td>
<td>572</td>
</tr>
<tr>
<td>Duplicate/Clone a Site</td>
<td>575</td>
</tr>
<tr>
<td>Multiple-Site Search</td>
<td>579</td>
</tr>
<tr>
<td>List of Reserved Title URL</td>
<td>582</td>
</tr>
<tr>
<td>Account and Billing</td>
<td>584</td>
</tr>
<tr>
<td>Purchasing ProProfs Knowledgebase</td>
<td>585</td>
</tr>
<tr>
<td>Upgrade or Downgrade your Plan</td>
<td>586</td>
</tr>
<tr>
<td>Cancel Your Account</td>
<td>587</td>
</tr>
<tr>
<td>Update Credit Card Information</td>
<td>590</td>
</tr>
<tr>
<td>Invoices</td>
<td>592</td>
</tr>
<tr>
<td>How to Log in and out of ProProfs Knowledgebase</td>
<td>594</td>
</tr>
<tr>
<td>Submit A Ticket</td>
<td>595</td>
</tr>
<tr>
<td>ProProfs Knowledge Base: Commitment to Accessibility</td>
<td>596</td>
</tr>
<tr>
<td>Drafts</td>
<td>598</td>
</tr>
</tbody>
</table>
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 own color theme, CSS, domain name, and other features.

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

Here's how you can create a knowledge base:

**Step 1:** From your ProProfs Knowledge Base dashboard, go to Sites >> + Help Site.

**Step 2:** Enter the site URL, name, and click Create to proceed.
Help Site

Setup your site

**URL:**  
https://[username].helpdocsonline.com

**Site Name:**  
The name of your site which will appear on the web browser title

Create  Cancel

**Step 3:** Select from a variety of **templates** or build your site from **scratch**.

**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.
Getting Started

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

You can add a user, edit their details, and delete them in easy steps. All this can be done in the Settings of your Knowledge Base dashboard.

Let's first take a look at how you can add a user:

**Step 1:** From your ProProfs Knowledge Base dashboard, go to Settings >> User.

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

**Step 3:** Fill the required details and click Create at the bottom of the form. The user has been added.
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. Browse the file for uploading.
3. Upload the file so that the users are added.
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 should appear as a table and the first row of the sheet should be the header. Also, the header should have the details in the same order as mentioned below or else it won't work.

Download Sample Upload Files.xlsx

Upload your list in a spreadsheet format.

To edit a user, do the following:

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

Step 2: You can now edit the details such as user credentials, their role, language, time zone, and more.
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 as well. Once you're done, save.

To delete a user, do the following:

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

![Dashboard Screenshot](image)

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.

**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 users 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
Create
Add Your Company Logo to Your Knowledge Base

Customize your knowledge base by adding your company logo and customizing the header to match the color theme of your website.

Here's how you can add a logo to your knowledge base:

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

![Dashboard](image)

**Step 2:** Scroll down to the section **Header and Logo** and set the **Site Header** to **Default**. Then, click **Your Logo Here**. You make other adjustments as well such as the text color, header color, etc. Once done, **save**.
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.
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.

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.
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.
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.

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

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.

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.’

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

Alternatively, you can [create a Footer through HTML/CSS](#) by clicking the **Advanced** button.
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?
How to Add, Edit, and Delete a Page

Create multiple pages in your help sites to provide the best possible self-help experience to your website visitors and customers. In this article, you'll learn:

- Add a page
- Edit and delete a page

Here's how to add a page in the knowledge base:

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

**Step 2:** Under the Page tab, click Blank Page and then Select. If you want, you can also import pages from the Import tab.
Step 2.1: You can go to the Import tab and import pages in the following formats: .doc, .docx, and .pdf
Here's how to edit and delete a page:

**Step 3:** Once the page is added, it is opened for editing. By default, the page is titled 'Untitled'.

You can do the following to edit and delete the page:

1. Right-click on the page in the Table of Content to **rename** it, create a **duplicate** copy, **delete** it, etc. Alternatively, you can click on the **settings icon** on the page title in the TOC to invoke the same options.

2. Customize the **page URL** and access the **page settings**. In the settings, you can enter SEO keywords, meta description, the author name for the page, and more. You can also decide
the page-type as text or video, whether you’d like the page to appear in the Table of Content, etc.

3. and 4. are the page titles.

**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.

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

**Note:** The ability to publish pages depends on the user’s role.

If you want to edit a page that is saved as a draft or already published, select the page and click **Edit Page**.

**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 exit the page and come back later. However, you can still continue editing the page.

**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

Folders are used to organize and group pages. You can also create hierarchies of folders and pages. You can rename, copy, add restrictions, make the folder hidden, and enable disable folder content page.

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

In this article, you will learn

- Add a Folder
- Copy a Folder
- Delete a Folder

Other settings for the folder management

- Rename a Folder
- Folder Content Page
- Expand and Collapse Menu
- Make Hidden

**Here's how to add a folder in the knowledge base:**

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

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

**Here's how to copy a folder in the knowledge base:**

**Step 1:** Right-click over the folder name and click on Copy Folder.
Step 2: Provide the **folder name** and **select the help site** where you want to copy the folder. Click on **Save**.

Here's how to delete a folder in the knowledge base:

Step 1: Right-click over the folder name and click on **Delete**.
A confirmation message will appear that you must confirm that you want to delete the folder. Click on Yes.

**Rename a Folder**

You can rename the folder any time by right-clicking and selecting Rename. Enter the name and click outside of the text input to save the folder name.

**Folder Content Page**

You can enable or disable the folder content page. The folder content page displays the list of pages inside the folders. By default folder content page is always enabled, you disable the same
by right-clicking on the folder name and select **Folder Content Page**. Select **disable** and click on **Save**.

Expand/Collapse Menu

By default, the folder should be collapsed, if you set the folder open by default after page loading, click on **Expanded Menu**.

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

Make a Folder Hidden

This allows you to hide the folder and all the items inside the folder. Only logged-in users will
see hidden folders. To make a folder hidden, right-click on a folder then click **Make Hidden**.

If you want to make the hidden folder visible, simply right-click on the folder name and click on **Make Visible**.

**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

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 various folders. It offers central editing, editing the page in one folder or location will automatically apply the changes elsewhere.

Example: We have synced the Awards Page with the Awards of Excellence Page.
Here's how you can add a sync page

**Step 1:** Log in to your ProProfs Knowledge Base account, right-click on the page which you want to sync with another page.
**Step 2:** A window will appear listing all the published pages. Select the page you wish to sync, then click **Save**.
Step 3: The sync page with the same title as the original page is ready to be synced to a different page. To move, Click and Drag the synced page in this case "Awards" to the desired location.

Another way you can do that simply click on **Add New** and select **Sync Page**. A new will appear listing all the published pages. Select the page you wish to sync, then click **Save**.
**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

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 a graphical user interface. A tooltip is meant to provide instant explanatory text. For example, technical terms present in a web form can have tooltips providing users helpful information using short descriptions.

Below is an example of what a tooltip is:

In this article, you'll learn:

- How to create a tooltip on a website
- How to create a tooltip on a ProProfs page
- How to edit a tooltip content

Here's how you can create a tooltip on a website:

**Step 1:** On your ProProfs Knowledge Base dashboard, go to + Add New >> Tooltip.
Step 2: Enter the required details.

- **Name**: Enter the tooltip name that will be used to recognize the tooltip. This is hidden from the users.
• **Description:** This is used to describe the tooltip content. This is also hidden from the users.

• **Custom ID:** This is automatically generated. But you can enter your own. Please note that it shouldn't contain any numeric character.

• **Width/Height:** Adjust the width of the box in which 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 position of the cursor respectively.

• **Auto-Close:** Enable this option if you want the tooltip to close automatically on moving the cursor away from the link.

• Enter the tooltip text in the large text box provided.

• **Test Here:** This is to preview the tooltip.

• **Use https (secure):** Check this in case your website or web application runs on //https (SSL).

• **Use Custom ID:** Check this if you've provided your own Custom ID.

**Tooltip style and CSS**

**CSS (Cascading Style Sheets)** stores style presentation information (such as colors, fonts, layout, etc.) of a webpage. ProProfs provides you the option to independently control the CSS for the tooltips you create. This allows you to have a distinct style for your tooltips compared to the webpage content it is being applied to.

**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 pointers that you can change based on your preferences:

**Sample Code**
Step 3: Copy the code snippet and paste 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 it. They'll do the rest. Save when you're done.
How to add Multiple Tooltips to Your Website

If you are adding multiple tooltips to a single webpage and do not want to load the JavaScript file more than once. The solution is to move the JavaScript script file to the head of your webpage.

Sample Code

```html
<script src="http://www.helpdocsonline.com/jquery-1.7.2.min.js"></script>
<script src="http://www.helpdocsonline.com/v2/tooltips.js"></script>
<a href="#" title="tip:http://site.helpdocsonline.com/ID246">Lorum Ispum</a>
```

Now copy the highlighted code and move the same into the `<head>` tag. Place the rest of the code in the `<body>` tag.

Example

```html
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"http://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
```
To create a tooltip on a ProProfs page:

**Step 4:** You do not have to copy/paste the entire code snippet, to a ProProfs page, as explained above. Instead, just 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 5: You are required to put that numerical value in the following code:

```html
<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 gave during its creation. This is to ensure that the tooltip is shown with the correct name on the intended ProProfs page.

Now, taking the example of the screenshot in Step 4, the updated code should now read:

```html
Sample Code
<a class="hq-tip" href="id=74767">Knowledge Base</a>
```

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

Step 6: Open the ProProfs page for editing where you want the tooltip to appear.
Step 7: Go to the Source to access the code of the page. Copy the updated code from Step 5 where you want the tooltip to appear and save.

This is how the tooltip looks like after it is applied on a ProProfs page.

Edit Tooltip Content

You can view all the tooltips you’ve created as well as edit each one of them if you want. To do that:

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 a tooltip name to open it for editing.
4. Delete a tooltip.
5. Preview tooltip content by hovering the cursor over View.

**Related Articles:**

- How to add a Sync Page?
- How to Create Content Snippets?
- How to Add Toggle Content?
Content Snippets

Content Snippets are small pieces of customizable content that can be placed anywhere on a webpage. They are extremely useful when you want to display a certain text piece (such as an offer) at different locations on your website without needing to repeatedly write that text at multiple locations on a webpage or webpages.

Benefits of using a Content Snippet:

- Prevents you from repeatedly writing the same piece of text.
- Just create a single Content Snippet and place it at the intended locations on your website.
- Any editing done to it will be reflected in all those locations where it is placed.

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

Here's how you can create a Content Snippet:

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

**Step 2:** Enter the required details to create a Content Snippet.
As shown in the screenshot above, all the elements to create a Content Snippet are explained below:

1. Enter the title for the Content Snippet.
2. Enter the description that explains what the Content Snippet is about.
3. Check this if you want to make this Content Snippet available for all your ProProfs sites. You'll be able to add this snippet to all your help sites. Else, keep this unchecked if you want it to be available for this particular page only.
4. Use the toolbar to customize the content for the Content Snippet. You can also add multimedia through Insert.
5. This is the box where you'll write or add the content for the Content Snippet.

**Step 3:** All your created Content Snippets appear in a list, as shown in the screenshot below. Here, you can do the following:

1. Edit a Content Snippet by clicking on its name.
2. Add a new Content Snippet.
3. Delete a Content Snippet.
4. This page can also be accessed by going to **Preview >> Content Snippets**.
Step 4: To add a Content Snippet to a webpage, open the page for editing.

Step 5: From the toolbar, go to Insert >> Content Snippet.

Step 6: Select the Content Snippet you created and click insert.
Step 7: You get a snippet that you can place anywhere on the webpage. Also, you can drag the snippet to create multiple copies of it and place them at different locations on the same webpage. Once you're done, save and update the page.

Step 8: This is how a simple text-based Content Snippet looks like on a ProProfs webpage.
Related Articles:

- How to Create a Tooltip?
- How to Add Toggle Content?
- How to Create a Merge Tags?
How to Add Toggle Content

The toggle allows you to expand or collapse a section of a help article. A toggle has a heading that a user can click to expand a section that displays the hidden content. The hidden or collapsed content can include images, videos, tables, and text. This makes it easier for readers to scan a page efficiently by presenting them with a cleaner interface. The content in a toggle is not just limited to a single article or site. It can be used across multiple sites and is especially useful if a certain piece of information is repeated in multiple articles. For eg. Contact info. of a company.

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

Benefits of Toggle Content:

- Maintains uniformity of information across multiple sites.
- Content created in a toggle is reusable.
- Opens in the same window and doesn't redirect the reader to a separate page.

In this article, you'll learn:

- How to create a Toggle
- How to insert a toggle content

Here's how you can create a Toggle Content:

Step 1: From your ProProfs Knowledge Base dashboard, go to + Add New >> Toggle Content.
Step 2: Add details in the toggle content customization window according to your requirements.

As shown in the screenshot above, let's understand all the elements of the Toggle Content customization window:

1. Add the **title** for the Toggle Content
2. A small **description** of what the Toggle Content is about.
3. Check this if you'd like to make this Toggle Content available for all your ProProfs sites. Keep this unchecked if you want this content for this particular site only.
4. Customize the content using different functions on this toolbar. This is similar to the toolbar you get while adding a new page.

5. This is the box where you write or add the content that will show as Toggle Content.

Once done, **save**.

**Step 3:** Your created Toggle Content appears in a list, as shown in the screenshot below.

Here, you can do the following:

1. Edit a Toggle Content by clicking on its name.
2. Create a new Toggle Content.
3. Delete a Toggle Content.

**Insert** Toggle Content to a Page

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

**Step 2:** From the toolbar, go to **Insert >> Toggle Content**.
**Step 3:** Select the Toggle Content and click **Insert**.

![Insert Toggle Content](image)

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

![Edit Page](image)
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.

Types of Tags

There are two types of merge tags:

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

   ![System merge tags table](image)

   - Merge tags allow you to dynamically add reusable content to your pages. Learn more

2. Custom merge tags - Custom tags are those tags that you can create as per your requirements and add them to pages on your help site.
In this article, you'll learn:

- How to create a Merge Tag
- How to add a Merge Tag to a page
- How to view, edit, and delete Merge Tags
- How to add custom color to Merge Tags

Here's how you can create a Merge Tag:

**Step 1:** From your ProProfs Knowledge Base dashboard, go to + Add New >> Merge Tag.
Step 2: Provide the **Name, Default Value** for the placeholder. Click on **Save**.

- **Name** - 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.

![Merge Tag](image)

Step 3: All your created Merge Tags appear in a list as shown in the screenshot below. This page can also be accessed by going into **Preview >> Merge Tags**.

![Merge Tags](image)

Here, you can do the following:

1. Edit a Merge Tag by clicking on its name.
2. Create a new Merge Tag.
3. Delete a Merge Tag.
4. This page can be accessed by going into **Preview >> Merge Tags**.
Here's how to insert a Merge Tag on a ProProfs page:

Step 1. Open a page for editing where you want to add a Merge Tag.

Step 2: From the toolbar, go to Insert >> Merge Tag.

Step 3. Select the **System Merge Tag** or **Custom Merge Tag** you want and click **Insert** to add it to the page.
When to use System merge tags

ProProfs Knowledge Base offers a library of different system merge tags that 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.

<table>
<thead>
<tr>
<th>Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>user.first_name</td>
<td>Display the first name of the user.</td>
</tr>
<tr>
<td>user.last_name</td>
<td>Display the last name of the user.</td>
</tr>
<tr>
<td>user.email</td>
<td>Display email address of the user.</td>
</tr>
<tr>
<td>user.role</td>
<td>Display the role of the user like admin, editor, etc.</td>
</tr>
<tr>
<td>user.language</td>
<td>Display the language preference of the user.</td>
</tr>
<tr>
<td>user.timezone</td>
<td>Display timezone of the user</td>
</tr>
<tr>
<td>user.last_login_time</td>
<td>Display the last login date and time of the user.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>page.id</td>
<td>Display unique id of the page.</td>
</tr>
<tr>
<td>page.type</td>
<td>Display the type of the page as text or video.</td>
</tr>
<tr>
<td>page.title</td>
<td>Display the title of the page.</td>
</tr>
<tr>
<td>page.status</td>
<td>Display status of the page like published, draft, etc.</td>
</tr>
<tr>
<td>page.toc_name</td>
<td>Display the name of the page on the table of content.</td>
</tr>
<tr>
<td>page.url</td>
<td>Display URL of the page.</td>
</tr>
<tr>
<td>page.created_at</td>
<td>Display the date and time of the page when the page was created.</td>
</tr>
<tr>
<td>page.created_by</td>
<td>Display full name of the user who created the page.</td>
</tr>
<tr>
<td>page.last_modified_at</td>
<td>Display date and time of the page when the page was last modified.</td>
</tr>
<tr>
<td>page.last_modified_by</td>
<td>Display full name of the user who modified the page last time.</td>
</tr>
<tr>
<td>page.published_at</td>
<td>Display date and time of the page when the page was last published.</td>
</tr>
<tr>
<td>page.published_by</td>
<td>Display full name of the user who published the page last time.</td>
</tr>
<tr>
<td>page.related_articles</td>
<td>Display the related articles on the page.</td>
</tr>
<tr>
<td>page.published_till</td>
<td>Display the expiry date of the page.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>page.next_page</td>
<td>Display a hyperlink of the next page based on the table of content order.</td>
</tr>
<tr>
<td>page.next_page_url</td>
<td>Display URL of the next page based on the table of content order.</td>
</tr>
<tr>
<td>page.previous_page</td>
<td>Display a hyperlink of the previous page based on the table of content order.</td>
</tr>
<tr>
<td>page.previous_page_url</td>
<td>Display URL of the previous page based on the table of content order.</td>
</tr>
</tbody>
</table>
4. Additional information - Use these tags to give additional information about your company, website, recently published pages in your knowledge base and more.

<table>
<thead>
<tr>
<th>Tag Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>site.name</td>
<td>Display the name of the help site.</td>
</tr>
<tr>
<td>site.url</td>
<td>Display the URL of the help site.</td>
</tr>
<tr>
<td>site.language</td>
<td>Display the language of the help site.</td>
</tr>
<tr>
<td>site.recently_published_pages</td>
<td>Display the most recently published page.</td>
</tr>
<tr>
<td>company.name</td>
<td>Display company name.</td>
</tr>
<tr>
<td>company.website</td>
<td>Display company website.</td>
</tr>
</tbody>
</table>

How to add custom color to Merge Tags

Once you are done adding the merge tag, select the tag and click on the text color from the toolbar. Select the color for your merge tag.

After selecting a color, save the page and click on Preview.
Help Site Branding
Content Snippets
How to Create a new Help Site
How to Create a Multi Branding Help Site

The Multi Branding Site feature allows you to create multiple copies of a single help site. You can brand each copy differently by putting a different logo on its Home page. This enables you to market the same help content under different brands. You can create as many multi branding sites as you need. Using the Multi Branding Site feature is easy and it prevents you from manually creating entire multiple sites with the same content.

Here's how you can create a multi branding help site:

Step 1: From your ProProfs Knowledge Base dashboard, go to Sites >> + Multi Branding Site.

Step 2: The following pop-up window will open.
Here, do the following:

1. Select the help site of which you want to create multi branding sites.
2. Complete the URL for the multi branding site you're creating.
3. Enter the name for the multi branding site you're creating.
4. Click **Create**.

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

**Step 4:** When you want to see the multi branding sites that you've created, go to **Sites**, and then
locate the primary help site that you’ve branched out to multiple branding sites (as shown in the screenshot below).

Repeat the steps above to create more multiple branding sites for the same help site.
How to View All the Pages in the Knowledge Base

You can see all the pages you've created under a particular help site by using the feature **View Pages**. It lists all the pages of a help site that you can sort according to their statuses such as published, unpublished, in the draft, or in progress. The **View Pages** feature further enables you to manage these pages easily in a single location. All this is explained below in the article.

Here's how you can view and manage all the pages of a help site:

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

**Step 2:** This is how the **View Pages** screen looks like. You can see a list of all the pages you've created under a particular help site along with a variety of details.

**Step 3:** Let's understand what all you can do on the **View Pages** screen, starting with how to sort the pages list according to their **status**, as shown in the screenshot below.
1. Sorting the pages list according to their status is just a click away:

- **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 also include those pages that are originally published but any recent changes in them are not yet live. Hence, their current status will be shown as Unpublished.
- **Unpublished**: Only the pages that are unpublished are shown in the list.
- **Draft**: Only the pages that are being created for the first time are considered to be in the draft. This shouldn’t be confused with unpublished pages. Only a published page can have its status changed to Unpublished.

**Step 4**: Moving on, there is a set of options available for you to manage the pages, as highlighted in the screenshot below. Let’s take a look at them.

2. These options allow you to perform the most important actions on the pages:

- **Delete**: Select a page or pages and delete them.
• **Edit**: Edit a single or multiple pages. The screenshot below shows how the Edit window looks like. You can change the page type between text/video, author name, enable to 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 for this page/pages.

![Edit Window](image)

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

• **Unpublish**: You can unpublish a page or pages with this option. This is useful when, for example, the content on a page has become outdated and is no more useful for the viewer. You can unpublish it to hide it from the public view.

• **Reset Feedback**: If you've received any feedback on a page, this option resets the feedback to zero. Just select a page/pages and hit Reset Feedback.

**Step 5**: Up next, are the columns. Each of these columns is clickable. For example, you can click on the column **Page Title** to sort the page list according to the page titles.
Step 5.1: You can hide any of these columns and add more columns as well. To do that, follow the sequence as shown in the screenshot below.

1. When you hover the cursor over some of the column names, a down arrow button is displayed. Click on it.
2. Go to Columns.
3. Check/uncheck the column names you want to show/hide.

Step 5.2: Let's understand what these different columns mean:
• **TOC Name:** This means the title of the page that is shown in the Table of Contents.

• **Page Title:** The page title as shown on the page itself. Also, this is shown as a link, on the View Pages screen, to open a particular page.

• **Status:** Represents a page's status such as published, unpublished, draft, and in-progress.

• **PDF:** 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 show a page in the search results.

• **Last Modified:** This shows the date when a page was last edited.

• **Author:** Shows the name of the person who created a page.

---

**Related Articles:**

- Edit or Delete a Page
- Home Page
- How to Add and Publish a Page
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:

![Toolbar Screenshot](image)

**Shown below is the complete toolbar.**

![Toolbar Image](image)

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**
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).
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.

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.
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.
Revision History

Want to recover a previous version of a page? 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. The versions allow you to look back at the recent changes you’ve made and revert to an earlier version if necessary.

Benefits of accessing the Revision History of a page:

- See all previous versions of a page along with their respective date and time of creation.
- Restore any previous 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 how you can access the revision history of a page:

**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 version and previous pages that you can restore. You can also see the differences between any two versions of the page.

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

2. **Restore this version** - Clicking this option restores that particular version over the one which is currently published. 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 the differences between them. The screenshot below shows how the differences between any versions of a page 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.
Step 2.1: To see the workflow history, click **WorkFlow History**.

<table>
<thead>
<tr>
<th>Date</th>
<th>Status</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 19, 2020 12:48:35 AM</td>
<td>Publish</td>
<td></td>
</tr>
<tr>
<td>Feb 19, 2020 12:48:08 AM</td>
<td>Publish</td>
<td></td>
</tr>
<tr>
<td>Jun 25, 2019 09:30:59 PM</td>
<td>Publish</td>
<td></td>
</tr>
<tr>
<td>Jun 13, 2019 12:52:43 AM</td>
<td>Publish</td>
<td></td>
</tr>
<tr>
<td>Jun 13, 2019 12:52:12 AM</td>
<td>Publish</td>
<td></td>
</tr>
</tbody>
</table>

**Related Articles:**

- Edit or Delete a Page
- Home Page
- View All Pages
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.

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.

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.

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.
You can use URL parameters to hide or show certain pages in your 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 your 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.
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.
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.
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
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
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.

**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.
How to restrict editing to users

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

![Image showing how to locate Restrictions]

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

You can use URL parameters to hide or show certain folders in your 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.
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.
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.
Suggested Reading: Introduction to Conditional Content
What Are Callouts?

Help articles require constant updating. Every time a new feature is added or an existing feature modified, the articles related to it need to be created or edited according to requirements. Callouts are small graphic illustrations that inform the visitor about such changes. 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 appropriate article.

Given below is an example of a callout:

How To Enable Callouts In ProProfs KnowledgeBase

Step 1: Login to your ProProfs KnowledgeBase account. Select the help article you need to add a Callout for and click on Edit Page.

Step 2: Once the editing window opens, Click on the Settings button.

Step 3: Click on the Advanced tab and choose a callout from the Call Outs drop-down menu. The Callout Start and Callout End can be used to schedule the lifetime of a callout. Once set, Click on Save and Update the article.
### Basic

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Outs</td>
<td>New</td>
</tr>
<tr>
<td>Callout Start</td>
<td>04/23/2019</td>
</tr>
<tr>
<td>Callout End</td>
<td>05/04/2019</td>
</tr>
<tr>
<td>Page Links</td>
<td>URL:</td>
</tr>
<tr>
<td></td>
<td>Permalink:</td>
</tr>
<tr>
<td></td>
<td>Static Link:</td>
</tr>
<tr>
<td>Page Restrictions</td>
<td>Restrictions</td>
</tr>
<tr>
<td>Published on</td>
<td></td>
</tr>
<tr>
<td>Published till</td>
<td></td>
</tr>
</tbody>
</table>

### Advanced

- Save
- Cancel

### Related Articles:

- How to Add and Publish a Page
- Edit or Delete a Page
- Editor Toolbar
Table of Contents (Side Menu)
Overview

The Table of Contents lists the hierarchy of pages, folders, and subfolders for a site in a tree format.

- 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

It is very easy to add pages, folders, and links to the table of contents.

Table of Contents Style

We currently offer two styles which we call Modern and Tree. You can change the style in the site's admin.
Drag and Drop to Reorder

You can move pages or folders by dragging and dropping them. Pages can be reordered or placed in folders or on top of other pages. Folders can be reordered and placed in other folders.

- To change the order, click your mouse on a page or folder and hold your mouse button down.
- Drag the page or folder to the desired location.
- To move a page or folder into another location a green icon will indicate a valid drop location.

- To move a page or folder in between two items a split indicator will appear.

- A red icon indicates that you have selected an invalid drop location. Sometimes it takes a little finesse to get the page into the desired location.

- Release the mouse button and the new order will save automatically.
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
- Folders options and more

See Add and Customize site.

Turn Off the Table of Contents

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

- Click on the **Settings** link.
- Select **Add, Edit, Customize Sites**.
- Select the site you want to turn off the table of contents for.
- Uncheck **Enable TOC**.
- Click **Save**.

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 image below.
To add the book-style icons, go to Settings -> Configure & brand and select the box that says "Show book icon".

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

Suggested Reading: Folders in the Table of Contents
Pages in the Table of Contents

- 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

To add a new page to the table of contents, follow these steps:

- Click on the **New Page** button in the toolbar.
- This will insert a new page into the table of contents (and will open the content editor for the new page).
- Enter a name for the page, and click outside of the text input 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).

- Text page that is published live
- Text page in draft mode
- Video page
- Video page in draft mode
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.

- When editing a page, from the page details click the link More settings.
- To remove the page from the table of contents, uncheck Show page in table of contents. This will hide the page from the table of contents.
- 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.

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

Rename a Page

- To rename a page in the table of contents, double-click on the page or right-click and select Rename.

Context Menu (Right-Click)

Each page and folder in the table of contents offers a context menu (right-click menu). To access the menu, right-click.
• **Start Open or Start Closed** - This allows you to set whether the subpages are shown by default. Start Open means that the page will be expanded and show the subpages. Start Closed means the subpages will be hidden until the parent page is clicked.

• **New Link** - This will create a new link at the location of the click. Learn more about links.

• **New Folder** - This will add a new folder at the location of the click. Learn more about folders.

• **New Page** - This will create a new page at the location of the click.

• **Rename** - This will activate a text input for you to rename the page.

• **Edit** - This opens up the page editor.

• **Delete** - This will move the page to the trash can. To permanently delete the topic, the user must empty the trash can contents. If the page has subpages or folders then this option will be disabled. To delete the page, drag all subpages from parent page.

• **Duplicate** - This will make a duplicate of the page with the same name plus ",- copy" at the end.

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

**Related Articles:**

- How to Add and Publish a Page
- Home Page
- Edit or Delete 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).

- Add a Link
- Link to Another Page
- Link to an External Website
- Editing a Link

Add a Link

To add a new link to the table of contents, follow these steps:

1. Open the "Add New" drop-down menu button, then click "Sync Page."
2. This will insert a new link into the table of contents (and open an overlay to define the link).
3. Enter a name for the link, and click outside of the text input to save the new page name.

Link to Another Page

This will allow you to have several entries in the table of contents for a single page.
Select the radio option **Sync Page** to ensure the page grid is shown.

Select the page you want to link to by clicking that page title. Optionally select anchor link.

The link will be created.

Click **save**.

Link to an External Website

This will allow you to have several entries in the table of contents for a single page.

Select the radio option **External link**.

Enter any web address available on the Internet, such as a website, a PDF document, or an image.
Example:
www.site.com/about.html
www.site.com/report.pdf

- For the Target, select the **Same Window**, which will open the link in the same browser window, or **New Window**, which will open the link in a new browser window.
- Click **Save**.

**Editing a Link**

To edit a link, right-click on the link and select **Edit Link**.

**Suggested Reading:** Editor Toolbar
Add a Lightbox

A lightbox is a JavaScript overlay. 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. To add a lightbox to your website or application, all you have to do is copy and paste a small code snippet.

- How to Add a Lightbox to Your Site
- The Code Snippet
- Adding Multiple Lightboxes to a Website
- Adding a Lightbox to a ProProfs page
- Lightbox Style and CSS
- Updating Content

How to Add a Lightbox to Your Site

Step 1 - Generate the lightbox

You can turn any ProProfs page into a lightbox.

1. Locate the page in ProProfs you want to add to your website or web application.
2. In the toolbar, click **Pop-Up & Lightbox**.
3. Click on the **Lightbox** tab.
Specify the following:

- **Width.** Enter in the width of the lightbox window. The default is 500 pixels.
- **Height.** Enter in the height of the lightbox window. The default is 700 pixels.
- **Use https.** If your website or web application runs on https:// (SSL) then check this box. 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.** By default the embed code will use the page’s URL. However, if you later change the page URL the lightbox will no longer work. The page ID will never change so this option is ideal if you plan on changing the page URL later.
- **Test.** Clicking the Test button will open the lightbox so you can test it before you copy the code.

Step 2 - Copy the code snippet

The next step is to copy the code snippet from ProProfs and paste it into your website.
1. Right-click inside the input box, and select **Copy**.

**Step 3 - Paste the code into your website or web application**

The next step is to add the code to your website. To do this, simply copy and paste the code snippet to your website wherever you want the lightbox to appear. It will insert a hyperlink to open the lightbox.

If you work with a developer, simply copy the code, and email it to the developer.

**Here is an example of lightbox code in a basic HTML webpage:**

```html
<!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>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
<title>Untitled Document</title>
</head>
<body>
<!-- Start lightbox code -->
<script src="http://www.helpdocsonline.com/jquery-1.7.2.min.js"></script>
<script src="http://www.helpdocsonline.com/v2/lightbox.js"></script>
<a id="679" href="javascript:;">Adding a Profile Photo</a>
<script type="text/javascript">
var lb = new TopicLightBox{
    baseUrl: 'http://emailmarketingco.helpdocsonline.com/',
    id:679,
    title:"Adding a Profile Photo",
    background: true,
}
</script>
</body>
</html>
```
Step 4 - Save and preview

After you add the code to your webpage, save the webpage, and preview it.

The Code Snippet

We have added //comments next to each line to help explain this sample code snippet.

```html
<script src="http://www.helpdocsonline.com/jquery-1.7.2.min.js"></script>
<script src="http://www.helpdocsonline.com/v2/lightbox.js"></script>  //this is the link to the javascript file. You can move this to your pages <head>
<a id="679" href="javascript:;">Profile Photo</a>  //link name and can be changed
<script type="text/javascript">
var lb = new TopicLightBox({
    baseUrl: 'http://emailmarketingco.helpdocsonline.com/','',  //do not change this
title:"Adding a Profile Photo", //lighboxes title, delete it for a blank title
    background: true, //change to false if you do not want a background overlay
    anchor: "name of anchor"  //Add this manually to target a specific anchor target on a page
    width:700,  //width of the lightbox
    height:500  //height of the lightbox
});
</script>
```

Adding Multiple Lightboxes to a Website

If you are adding multiple lightboxes to a single webpage, you will not want to load the JavaScript file more than once. The solution is to move the JavaScript script file to the head of your webpage.

Here is an example of a webpage with two lightboxes:

```html
<html xmlns="http://www.w3.org/1999/xhtml">
    <head>
        <!--Lightbox 1-->
        <a id="679" href="javascript:;">Adding a Profile Photo</a>
        <script type="text/javascript">
            var lb = new TopicLightBox({
                baseUrl: 'http://emailmarketingco.helpdocsonline.com/','',  //do not change this
title:"Adding a Profile Photo", //lighboxes title, delete it for a blank title
                background: true, //change to false if you do not want a background overlay
                anchor: "name of anchor"  //Add this manually to target a specific anchor target on a page
                width:700,  //width of the lightbox
                height:500  //height of the lightbox
            });
        </script>
    </head>
</html>
```
Adding a Lightbox to a ProProfs page

You can also add a lightbox on a ProProfs page. You will need to insert this hyperlink in the pages source. To do this click on 'Source' from the editors toolbar and paste in the below code where you want the link. Then update the link name and click the 'Source' icon again to view the page.

Choose any of the link formats below. You can open a lightbox by page name, page ID, or URL. You can also open to a specific anchor point on the page

**Page url:**
This will open the lightbox by the page URL name. For example if you have a page site.helpdocsonline.com.com/how-to-reset-password you would copy how-to-reset-password and update that section in the link code. You can also target a specific anchor point on that page how-to-reset-password$anchor

**Url from another site:**
You may want to include a lightbox from another one of your sites. Just copy the URL of the page and update that section of the link code.
Page ID:
The page ID never changes so you do not have to worry about later updating a page URL and having it break your links. To find the page ID just view a page, and from the toolbar select Print > Page Links. Copy the ID and update the link code.

Page Style and CSS

The page's style and formatting are defined by your site's CSS. At this time, you cannot change the style of the actual lightbox window.

Updating Content

Once you have added the code snippet to your webpage or web application, you do not have to worry about making any updates on your webpage. You do not have to copy and paste the code to your webpage each time you make an update in ProProfs. Any updates you make in ProProfs to a page's content will instantly update the lightbox on your webpage. Our goal is to make help content management easy for you.

Related Articles:

Callouts
Add a Popup
Create a Tooltip
Popup Window

You can add a small code snippet to your website or web application that will open a page in a new web browser pop-up window. 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.

- How to Add a Pop-Up to Your Site
- The Code Snippet
- Adding Multiple Pop-Ups to a Web page
- Page Style and CSS
- Updating Content

How to Add a Pop-Up to Your Site

Step 1 - Generate the pop-up window

You can turn any ProProfs page into a browser pop-up.

1. Locate the page in ProProfs you want to add to your website or web application.
2. In the toolbar, click **Pop-up & Lightbox**
3. Click on the **Pop-Up Window** tab.
1. Specify the following:

- **Width**. Enter the width of the browser window. The default is 500 pixels.
- **Height**. Enter in the height of the browser window. The default is 700 pixels.
- **Use https**. If your website or web application runs on https:// (SSL) then check this box. This will update the link in the code from http:// to https://
- **Test**. Clicking the Test button will open the pop-up so you can test it before you copy the code.

Step 2 - Copy the code snippet

The next step is to copy the code snippet from ProProfs and paste it in your website.
1. Right-click inside the input box, and select **Copy**.

**Step 3 - Paste the code in your website or web application**

The next step is to add the code to your website. To do this, simply copy and paste the code snippet to your website where you want the pop-up to appear. It will insert a hyperlink to open the pop-up.

If you work with a developer, simply copy the code, and email it to the developer.

Here is an example of the pop-up code in a basic HTML webpage:

```html
<!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>
<meta http-equiv="Content-Type" content="text/html; charset=utf-8" />
<title>Untitled Document</title>
</head>
<body>
<a href="javascript:void( window.open('http://helpiq.helpdocsonline.com/static/ID629',
'blank', 'scrollbars=yes, toolbar=no, width=700, height=500'));">View</a>
</body>
</html>
```

**Step 4 - Save and preview**

After you add the code to your web page, save the web page, and preview it.
The Code Snippet

We have added these `//comments` next to each line to help explain the code snippet:

```html
<a href="javascript:void( window.open('http://helpiq.helpdocsonline.com/static/ID629',
blank', 'scrollbars=yes, toolbar=no, width=700, height=500'));">View</a>
```

- `scrollbars=yes` // (yes or no) turn the browser scrollbar on or off
- `toolbar=no` // (yes or no) include the web browser's toolbar
- `width=700` // the width of the web browser window (type the number you want here)
- `height=500` // the height of the web browser window (type the number you want here)

`">View</a>` // this is the link name (change this to whatever you want)

Note: The user's browser settings might override these options and make the pop-up window appear in a standard new browser tab or window instead.

Related Articles:

- Callouts
Add a Lightbox
Create a Tooltip
Working With Images

ProProfs allows you to easily add images to pages.

- **Drag and Drop**
- **Copy and Paste Upload**
- **Using the Toolbar**
  - Resizing Images
  - Uploading an Image
- **File Manager**
- **Image Lightbox**

---

**Drag and Drop**

To add files or images to a page, simply drag them from your desktop onto the editor. The system will automatically upload the files or images to the server and insert them into your page without any extra steps.

This feature works with the current stable versions of Firefox, Chrome, and Safari. If you use Internet Explorer, then you need the IE 10 or above.
Copy and Paste Upload

- Open the image up on your desktop.
- Right-click on the image and select Copy (CNTRL + C).
- In the editor, place your cursor where you want the image to go on the page and select Paste (CNTRL + V).
- The image will be uploaded and inserted into your page.

This feature works with the current stable versions of Firefox and Chrome only.

Using the Toolbar

In order to insert an image, simply select from the editor toolbar then select **Upload Image**.

Image Info

The **Image Info** tab is the default tab that opens after you press the button on the toolbar. It allows you to set the image's URL and configure the way it will appear on the page.
Below is an overview of all **Image Info** tab elements:

- **URL** – This is the web address of the image 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 textual description of the image 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** – This sets the horizontal spacing (or margin) between the image border (if present), or the image itself, and other document elements that surround the image, in pixels.

- **VSpace** – This sets the vertical spacing (or margin) between the image border (if present), or the image itself, and other document elements that surround 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.

## Resizing Images

You can easily resize images. If the image is too big, you can alter its dimensions by entering new values into the **Width** and **Height** fields. By default the image ratio is locked, which you can see by the  button. This means that when you change one of the size values (width or height), the other one will be adjusted automatically.

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

You can easily return to the original image size by pressing the  button. This will reset the image size; the original width and height will now appear in appropriate text boxes.

## Uploading an Image

The **Upload** tab of the Image Properties dialog window allows you to upload your own images to your image library.
To upload an image file, click **Add an Image**. When the file browser of your operating system opens, navigate to an appropriate folder and choose a file by double-clicking it or using the **Open** button. To send the file to the server, click the **Send it to the Server** button.

**Advanced**

The **Advanced** tab lets you configure additional image options such as assigning it an ID, a class, a longer description, a tooltip, or CSS style properties. It is meant for advanced users with knowledge of HTML and CSS.
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).

- **Language Code** – This is the language of the image element specified according to RFC 1766 (lang attribute).

- **Long Description URL** – This is the web address of an HTML page containing a longer description of the image (longdesc 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.

- **Advisory Title** – This adds the text of the tooltip that is shown when the mouse cursor hovers over the image (title attribute).

- **Style** – This is for CSS style definitions (style attribute). Note that each value must end with a semicolon and individual properties should be separated with spaces.
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 files you have uploaded. You can browse, upload, and manage images here. Learn more about the file manager.

Image Lightbox

This feature allows you to insert high quality images on your pages but take as little screen space as you specify by utilizing thumbnails. You can also place images in a group/gallery to easily navigate a collection of related images. An image with lightbox applied can be clicked to show the full or custom size of the image.

Follow these steps to add an image lightbox to a page:

- In your content editor, click Insert dropdown > then Image.
- Select Image Lightbox tab in the Image Properties dialog.
- Click Browser server to pick an image from your File Manager. You may also just place an image path in the Image field.
- Make sure to click Ok at the bottom to save your changes.
 Below is the overview of all **Image Lightbox** tab options:

- **Image** - This allows you to just pick an image that exists in your File Manager.

- **Thumbnail size (size of image on page)** - As what the label says, it specifies the size of your thumbnail when the page is viewed. Choices are small(250x250), medium(350x350), large(450x450), Original image, Custom size. When selecting custom size, additional fields will show allowing you to specify width and height.

- **Lightbox size (size of image in lightbox)** - This allows you to specify size of image when viewing in a lightbox. Choices are Original image, Lightbox (800x600), 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 in a page with lightbox applied and having same group will allow the end-user to view other images in the group by using the navigation arrows in
the lightbox frame.

**Suggested Reading:** File & Image Manager
Tables

A table is a perfect format for some types of data, such as statistical information.

- Creating a Table
  - Table Properties
    - Advanced

- Working With Tables
  - Editing & Deleting Table Rows
  - Editing & Deleting Table Columns
  - Cell Properties

Creating a Table

To create a table, press the button on the toolbar. The Table Properties dialog window that will open lets you set configuration options that define table size, display properties, and other advanced properties.

The Table Properties dialog window includes two tabs that group table options:

- Table Properties
- Advanced

Table Properties

The Table Properties tab is the default tab that opens after you press the button on the toolbar. It allows you to set the table dimensions and configure the way the table will appear on the page.
Below is an overview of all **Table Properties** tab elements:

- **Rows** – This is the number of rows in the table (required).
- **Columns** – This is the number of columns in the table (required).
- **Width** – This sets the width of the table in pixels or a percent value. Giving the width as 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** – This drop-down list formats certain table cells as headers and applies special formatting to them. You can apply header formatting to 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, Right.
- **Cell spacing** – This is the space between individual cells as well as cells and table borders, in pixels.
- **Cell padding** – This is the space between the cell border and its contents, 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 a good practice to provide your tables with meaningful summary text in order to make them more accessible to users with disabilities.

**Advanced**

The Advanced tab lets you configure additional image options, such as assigning an ID, a class, a language direction, or CSS-style properties. 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, the table can be modified. To edit the table, either double-click it, or open the table context menu by right-clicking on it or using the Menu/Application key on your keyboard.

To delete the whole table and its contents, use the Delete Table option.

The Table Properties option allows you to change the configuration options that were set when the table was created, except the number of rows and columns which are grayed out.

Additionally the table context menu lets you modify the rows, columns, or particular table cells. This method makes it possible to insert new rows, columns, or cells in specified locations, as well as merge and split cells.

Editing & Deleting Table Rows

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

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 that 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 rows at once. 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 that 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 at once.

**Cell Properties**

Table cells can be further customized, creating a unique look and feel. Various configuration options can be set in the **Cell Properties** dialog window which can be opened from the Cell context menu in the table context menu.
Below is an overview of all the **Cell Properties** dialog window elements:

- **Width** – This sets the width of the cell in pixels or a percent value. Giving the width as a percent value lets you set the proportion of the row that the cell (and the column it is located in) will occupy.

- **Height** – This sets the height of the cell in pixels.

- **Cell Type** – This sets the type of the table cell—either a normal data cell or a header cell with special formatting.

- **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.
Links

- External Links
  - URLs (links to other websites, PDFs, etc)
  - Emails
  - Link to anchor in the text
  - Add an external link using HTML

- Anchors
- Removing a Link
- Link to Download a File

External Links

To insert a link into your page, press the button on the toolbar or use the Ctrl+L keyboard shortcut. If you want the link to be assigned to certain text, select that text first. If no text is selected, the link URL or email address will appear on the page as is.

The Link dialog window that will open let's you choose the link type and configuration options pertaining to your choice. It contains tabs that group link options, depending on the link type:

Link Type > URLs

The Link Type is set to URL by default so you can add a website address to your page. For this Link Type, all three tabs of the Link dialog window are available.

Link Info

The Link Info tab is the default tab that opens after you press the button on the toolbar. It allows you to choose the Link Type as well as set the link Protocol and URL.
Below is an overview of all Link Info tab elements:

- **Link Type** – This is the category of the link that will be inserted into the page. You can 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
    Example:
    - http://example.com/about.html
    - http://example.com/image1.jpg

- **Link to anchor in the page** – an internal link to a designated point on your page.
  Example:
  - #anchor1

- **E-mail** – an email address example: myname@example.com

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

- **URL** – This is the website address for the external resource that the link is pointing to.
  - Use the full absolute path.
    Example:
    - http://example.com/about.html
    - http://example.com/image1.jpg

- **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.

- **Link to Topic** - This will open an overlay to link to another page.

**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.

Below is the overview of all **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 specified according to RFC 1766 (lang attribute).
- **Tab Index** – The tab order of the link element (tab index attribute).
- **Advisory Title** – The text of the tooltip that is shown 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 more than one class. If this is the case, separate class names with spaces. See CSS.

- **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. See CSS.

### Link Type > Email

It is easy to insert clickable email addresses to your pages and even add the subject and body of the email message that will be created when you click the link. If you want to add a hyperlinked email address to the page, select **E-mail** from the Link Type drop-down list.

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

- **E-Mail 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 that will be pasted into the subject line of the email message.

- **Message Body** – This is the default text that will be pasted into the email message as its...
content.

For a detailed description of all Advanced tab elements, refer to the Advanced section above.

**Link Type > Link to anchor in the text**

If you want to point to an anchor previously set in the page, select **Link to anchor in the text** from the **Link Type** drop-down list under the **Link Info** tab.

The **Link Info** 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 that contain the ID attribute.

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

An anchor tag URL would be in the format: URL$AnchorName

Here’s an example of how an anchor tag would look like -
http://knowledgebase.proprofs.com/links$type-anchor

In the above example,

- URL is http://knowledgebase.proprofs.com/links

- AnchorName is a type-anchor.
Link Type > Add an external link using HTML

This example shows how you can link certain textual fragments (in this case "email campaign") to webpages or online documents, using HTML. To add the link click on Source on the WYSIWYG Editor as shown below.

Clicking on Source shows you the HTML of the page. Now, locate the text you want to link and add the HTML tag mentioned below.

As shown in the above image, paste this HTML tag and replace the link and anchor text with your desired ones.

Anchors

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."

Removing a Link

Removing a link is just as easy as adding it. When the cursor is placed on a link, the button on the toolbar becomes active. Pressing the button removes the link and leaves plain text. Alternatively, you can also open the element’s context menu by right-clicking, or using the **Menu/Application** key on your keyboard and choosing the **Unlink** command.

Link to Download a File

After you have **uploaded a file**, you can insert a hyperlink that will download that file.

- Edit the page.
- From the editor, the toolbar selects the **hyperlink** option.
  
  ![Toolbar with hyperlink option](image)
  
  - From the links overlay select **Browse Server**, and select the file you want to insert from the file manager.
• A hyperlink will be inserted on the page.

Related Articles:

Tables
Lists
Videos
Lists

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

- Numbered List
- Bulleted List

Numbered List

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

To create a numbered list:

- Click on the number list option in the toolbar

  ![Number list toolbar icon]

- 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.

- If you want to add more items to the numbered list, press the Enter key at the end of the numbered line of text. The cursor will move to the next line and insert the next list number at the beginning of that line.

To use a different style, e.g. lower-alpha:

- Right-click on the ordered list

- Click Numbered List Properties.

- In the dialog box, choose the style, e.g. Lower Alpha, then hit Ok.
Bulleted List

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

To create a bulleted list:

- Click this button.

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

- If you want to add more items to the bulleted list, press the Enter key at the end of the bulleted line of text. The cursor will move to the next line and insert the next bullet at the beginning of that line.

To use a different style:

- Right-click on the unordered list
- Click Bulleted List Properties
- In the dialog box, choose the style, e.g. Square, then hit Ok.
Related Articles:

- Tables
- Links
- Videos
Videos

Videos are great for walk-throughs, how-to's, demos, presentations, and more. When adding a new page, you can also specify it as a "video" page so users can quickly identify it in the table of contents (TOC) and the search results. You can easily embed videos from popular services like YouTube, Vimeo, and Blip.tv or you can upload videos directly from your local drive.

This article covers the following topics:

- How to embed Youtube videos
- How to upload a video in Knowledge Base

Follow these steps to learn how to embed Youtube videos:

**Step 1:** Navigate to the Youtube video page and open "Share" options.

**Step 2:** Go to embed option and copy the code.

**Step 3:** Click the "Embed Media" button in the Knowledge Base editor. Make sure to place the
Step 4: Paste the embed code in the 'Embed Media Dialog' box and click "OK." Your video will be added to the page.

Here's how the embedded video will appear in the editor:
You can double click the video to open the properties.

Let's learn how to upload a video in Knowledge Base:

**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."

We support videos in the MP4 format with file sizes up to 15 MB. If you want to
**Step 3:** When you have uploaded the video from your local drive it will automatically be added to the user media library so you can re-use it whenever needed. You can select the video’s alignment, and add custom width and height. Click “OK” to add it to the page.

![Video upload interface]

**Related Articles:**

- File & Image Manager
- Tables
- Editor Toolbar
CSS

Pages are formatted and styled by the CSS. This is a **site-wide CSS** that applies to all pages in a site. When you change a page's CSS it will affect the entire site. Each site comes with default CSS styles.

CSS stands for Cascading Style Sheets. It allows you to store style presentation information (such as colors, fonts, layout, etc.) separately from your HTML structure. This allows precise control over your page's layout and format.

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/](http://codex.wordpress.org/)

- Add or Edit CSS
- Applying CSS Styles
- Styles and Format Drop-Downs
- Changing the Default Font
- Reverting Back 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. You can control the theme, header, and other options by customizing the site.
Add or Edit CSS

To edit the CSS, press the toolbar button. An overlay will appear displaying all of your site's CSS. You can add or edit the CSS as you wish.
The CSS file comes with the system defaults style. However you can change any of these styles. This 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 welcome to change any of the default CSS. You can also add more CSS styles and classes to control the layout for any page.
Applying CSS Styles

Many CSS styles are applied automatically to elements. However, you can manually apply CSS styles to elements, such as links, images, DIVs, tables, etc., by double-clicking on the element to open the dialog and then selecting the Advanced tab. You can then enter in the CSS class name or ID that you want applied to the element.

Here is an example for an image.

![Image Properties Dialog](image.jpg)

Styles and Format Drop-Downs

The styles, format, and other options in the toolbar are powered by the CSS. If you want to change the formatting, such as the fonts, sizes, colors, etc., you will need to do it in the CSS.

In the Styles drop-down, here is the mapping to the CSS:

<table>
<thead>
<tr>
<th>Styles Drop Down</th>
<th>CSS Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computer code</td>
<td>.computer_code, code {</td>
</tr>
<tr>
<td>Computer code 2</td>
<td>.computer_code, code {</td>
</tr>
<tr>
<td>Tip</td>
<td>.tip {</td>
</tr>
<tr>
<td>Info</td>
<td>.info {</td>
</tr>
<tr>
<td>Warning</td>
<td>.warning {</td>
</tr>
</tbody>
</table>

In the Format drop-down, here is the mapping to the CSS:

<table>
<thead>
<tr>
<th>Format Drop Down</th>
<th>CSS Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>P { , Body {</td>
</tr>
<tr>
<td>Heading 1</td>
<td>H1 {</td>
</tr>
<tr>
<td>Heading 2</td>
<td>H2 {</td>
</tr>
</tbody>
</table>
Changing the Default Font

This guide is only intended for advanced users. However, the default font could be changed for all pages as follows:

1. Click on the CSS icon in the toolbar
2. Locate the Body {} class on the top of the list
3. Locate the font family attribute and font size as highlighted below.

```css
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`

You can also follow this same guide for changing the paragraph and heading styles.
Reverting Back to the Default CSS

If you break or damage the CSS code, you can click **Revert to default CSS**. This will restore the CSS back to the original setting. However, any CSS you changed or added will be deleted.

```
    font-style: italic;
} .computer_code, code {
    background-color:#f9f9f9;
    font-family:"Consolas", "Courier New", Courier, mono,
    font-size:12px;
    line-height: 1.7em;

(Revert to default CSS)
```

Multiple Sites and CSS

Each site you create will have its own 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.
Basic Overview
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.
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 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.
Search

The search feature will allow users to search and find pages. You can also add a search box to your website or web application.

- Page Suggestions
- Full Site Search
- Search Keywords
- Autosuggest
- Hide a Page from the Search Results
- Hide Search Box from Home Page
- Adding a Search Box to a Page
- Adding 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. Choose one of the suggestions to navigate directly to the page or ignore and perform a site search.

You can use your keyboard to quickly move up and down the list of suggestions then just press the Enter key to open.

Full Site Search

The search will be performed sitewide. Draft pages and pages marked to be excluded from the search will not return in the results. Search will search 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 box and press the Enter key.
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 be highlighted in Yellow Color.

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.

When editing a page, from the page details click the link More settings.

- Make sure the page you select as Show page in search results. Enter your keywords and
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.

- When editing a page, from the page details click the link **More settings**.
- To remove the page from the search results, uncheck the **Show page in search result**.

Hide Search Box from Home Page

If your homepage has a large search box on the page, you may not want to have another search box on the top right.
To hide the search box from the homepage:

1. Log in to your account (as an administrator) and click Settings.
2. Click Add, Edit, Customize Sites.
3. Select the site you want to edit.
4. On the 'start' page settings select Hide global search box on the home page.

The search box will now hide on the home page and appear on every other page.

Adding 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:

```html
<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 just like the global search box and will return the search results. Learn how to
access the source code of a page.

Adding 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. This 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:

```html
<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. If you have a custom domain set up, you would use that URL.
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. When adding new pages you have the option of including the page in the keyword index and can specify an index name. The index will list the keywords in alphabetical order (ABC). You can also hide the entire keyword index tab.

- Enable the Keyword Index
- Viewing 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. You can enable the keyword index on by:

- Click on the **Settings** link.
- Select **Add, Edit, Customize Sites**.
- Select the site you want to enable the keyword index for.
- Check **Show Index Tab**.

- Click **Save**.

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

Viewing the Keyword Index

To access the keyword index, follow these steps:
Click on the **Index** tab (next to the Table of Contents tab).

This will display the index of keywords.

To view a page, click on a keyword and that page will open.

### Add a Page to the Keyword Index

A new page will not appear in the keyword index by default.

- Make sure the **Keyword Index** feature is enabled.
- When editing a page, from the page details click the link **More settings**.
- To add a page to the keyword index, check **Show in Index**.
- Then 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 **Save**.

The keywords will now appear in the index.

**Hide a Page from the Keyword Index**

- When adding or editing a page, there is a check box called Show in Index.

- To hide a page from the keyword index, simply uncheck **Show in Index**.

- Click **Save**.

- The keyword will no longer appear in the keyword index.

**Rename a Keyword**

To rename a keyword, follow these steps:

- When editing a page, from the page details click the link **More settings**.

- In the input field, type the new keyword.

- 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 **Save**.

- The updated keyword will now appear in the index.

**Filter**

The filter will search the index by keyword. It will search 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.

To revert back to normal view, delete the search term out of the box.

Related Articles:

Retrieve Forgotten or Lost Passwords
Tabs
Search
Tabs

One helpful feature of ProProfs is the tabbed viewing. 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. Users can open multiple tabs that interest them (like bookmarking). After reading a tab, they can switch and begin reading the other open tabs. In addition, the administrator can turn off tabs globally or for specific users.

- How to Open a Tab
- How to Close a Tab
- Tab Control
- Tab Scrolling
- Turning Tabs Off
- Disable Tabs for all Users

How to Open a Tab

To open a tab, click on the page you want to view. A new tab will open up automatically.

How to Close a Tab

To close a tab, simply click on the X in the upper right-hand corner of the tab. This will close the page.
Tab Control

The tab control appears in the toolbar and allows users to select from the opened tabs or close all the tabs.

- To change pages, click on the title you want to view.
- The checkmark icon indicates which tab is currently being viewed.
- The Close All Tabs option will close all the tabs, so only the Home page shows.

Tab Scrolling

Once a user opens more tabs than can fit in the tab bar, a slider will appear. You can scroll through the tabs by clicking on one of the buttons.

Turning Tabs Off

If enabled for your site, each user can change views from a tabbed view to a basic view (no tabs).

- To change views, click on the drop-down menu.
Select the desired view.

The application will instantly refresh with the selected view.

Disable Tabs for all Users

If you prefer to have a single page viewing area for all your users, you can turn tabs off for an entire site.

Login to your account.

Click on the Settings link.

Select Manage Sites.

Select the site you want to turn off tabs for.

Under Default View, select Basic (no tabs).

If you do not want to allow users to change their own view, uncheck Allow users to change their own view.

Click Save.

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

Related Articles:

Password Reset
Tabs
Keyword Index
How to Reset Your Password

Follow these steps to retrieve a password. For security reasons we cannot email your password.

2. Click **Forgot password**.
3. Correctly enter your email and click **Next**.
4. Check your email inbox. If you do not see the email from ProProfs, check your spam or junk mail folder.

### Reset your password

You're receiving this email because you have completed the 'Password Reset' form for your ProProfs account. To get started, click the link below and then enter the code provided.

1. Click on the link that says **Click This Link**.
2. Enter the unique code, and click **Next**.
3. Enter your new password and confirm the password.
4. Click **Next**.

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 still be used. The email will expire in one hour.

### Related Articles:
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

To recover a deleted page, do the following:

Step 1. From your ProProfs Knowledge Base dashboard, go to Settings >> Vault.

Step 2. Select the page you want to restore and click Restore.
### 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 useful 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'.

Benefits of asking for feedback on your help content:

- Tells you how your webpages or articles are performing
- Helps you measure customer satisfaction
- Detailed feedback helps you create the best customer experience
- Shows your audience that you value their opinion

Here's how the feedback survey appears at the bottom of a page or article.

Whether the response is 'Yes' or 'No', it is instantly stored in the feedback report that you can check out later. When your website visitor answers ‘Yes’, the following question is presented to them to end the survey. They can choose to send their feedback or ignore the second question by clicking 'No thanks'.

When the answer is 'No', your website visitor gets 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. That said, they can choose to send or ignore this follow-up question by clicking 'No thanks'.
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. Go to Settings >> Feedback from your ProProfs Knowledge Base dashboard.

Step 2. The screenshot below explains how to enable and customize feedback settings.
1. Check the **Turn On Feedback** checkbox to enable users to share feedback.

2. Enter the email address where you’d like to get notified.

3. Enter the feedback question you’d like to ask. In case you do not prefer the edited question, click **Switch to Default** to reset it to the original version.

4. Enter the follow-up question for detailed feedback if the response is ‘No’ to the first question. You can click **Switch to Default** to reset to the original question.

5. Optionally, you can request website visitors to provide their email address when they’re submitting feedback.

6. You can also prevent your website visitors from giving feedback more than once per page visit. For example, if a website visitor submits their feedback, they cannot do it again for the same page unless the page is refreshed or they return to this page.

Click **Save** when you’ve customized the feedback settings.

**Note:** The feedback survey is applied to all your webpages and articles on your help site.

---

2. **How to access feedback report**

Feedback generates a corresponding report that shows you the rating given by your website visitors to your webpages or articles.
Step 1. Go to Reports.

Step 2. Go to Suggestions and scroll down to find the section ‘What are customers saying about articles?’ The screenshot below explains all the data that you can see in the report.

1. List from a minimum of 10 to a maximum of 100 feedback entries on a single page.
2. Shows the names of the articles/webpages that were given feedback.
3. Email addresses of your website visitors.
4. Shows feedback received as 'Good' or 'Bad'. 'Good' means your website visitor clicked 'Yes' while 'Bad' means they clicked 'No'.
5. Shows comments entered by your website visitors for the follow-up questions.
6. The date on which the feedback was given.
7. Download this report.

Related Articles:

How to Recover a Deleted Page

How to Integrate ProProfs Survey Maker Form with Knowledge Base

How to View All Pages
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 dialog box](image)

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
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**
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.

**How can the users make use of the search function:**

**Step 1.** 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.
Step 2. 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.

---

Step 3. You can sort your search by clicking on "Sort by."

**Relevance**: This will show the most relevant search as per the added keywords.
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 offers you the freedom to add URL 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 several links.

Here's how you can get it done:

**Step 1:** Login to your ProProfs Knowledgebase and click 'Settings'. Then, hit 'Configure & Brand'.

**Step 2:** Select the site you want this feature on.

**Step 3:** Click on 'Table of Contents'. Scroll down and enable 'Link folder to page' option. Then, hit 'Save'.

Copyright © 2014 ProProfs
Step 4. Now, go to your chosen site and select any folder. You will see all the pages of the selected folder listed. Refer to 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.
Step 4: You will get a confirmation message. Click "OK" to complete the process.

You have successfully copied folder 'Why Choose Us?-copy' to 'Help Site'

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**.

<table>
<thead>
<tr>
<th>Site</th>
<th>Language</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help Site</td>
<td>English - (United States) (default)</td>
<td><a href="http://clarkbruce.helpdocsonline.co">http://clarkbruce.helpdocsonline.co</a>...</td>
</tr>
<tr>
<td>Clark Corp.</td>
<td>English - (United States)</td>
<td><a href="http://clarkcorp.helpdocsonline.co">http://clarkcorp.helpdocsonline.co</a>...</td>
</tr>
<tr>
<td>Clark Corp.: Asia</td>
<td>English - (United States)</td>
<td><a href="http://clarkcorpasia2.helpdocsonli">http://clarkcorpasia2.helpdocsonli</a>...</td>
</tr>
<tr>
<td>Clark Corp.: Charity</td>
<td>English - (United States)</td>
<td><a href="http://clarkcorpcharity.helpdocsonli">http://clarkcorpcharity.helpdocsonli</a>...</td>
</tr>
</tbody>
</table>
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.

![Tabs](image)

• **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.

![Search Options](image)

**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.
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.

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.

![Header Background Image](image)

2. A new window opens. Now browse your computer for the header background image. Find the image, select it, and then click OK.

![Browse For Folder](image)

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).
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:

```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">`
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:

```html
<div id="navmain">
  <div id="login">{login}</div>
  <div id="logo"> <img src="http://site.com/1.png"/></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 `<img src="http://www.proprofs.com/logo.png" />` 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 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.
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](image)

   **Site Name** Email Marketing Co.
   
   The name of this help docs site. Appears on the web browser title
   
   **Start Page** Home
   
   **Site Address** http://emailmarketingco.helpdocsonline.com
   
   or **Set up 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.
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.

**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** English - (United States)
- **Site Address** http://help.youremailco.com Remove this Domain
- **Site Name** Email Marketing Co.

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.

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.
d) **Font Size**: Pick a font size of your choice.

![Font Size selection]

- Arial
- Futura
- Lucida
- Segoe UI
- Tahoma
- Trebuchet
- Verdana

**e) Line-Height**: You can increase or decrease the distance between two lines.
f) **Width:** You can adjust the width of the table of contents panel in pixels.

![Width](image)

**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](image)

**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.
How to Enable Page TOC

2. **Page Table of Contents**: Toggle it to **Yes** to display the table of contents in an article.

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.

---

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](https://www.microsoft.com). 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.

![Find & Replace Interface](image)

12. **Tag Tooltips**: You can enable this option to offer a tooltip within an article depending upon the contained information. [Learn More.]

![Tag Tooltips Interface](image)

When you toggle Tag Tooltips to 'Yes.'
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.
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 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
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.
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.'
Step 4: Click 'Save' to save your changes.

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

track-your-package
edit-cancel-order

Note: Choosing the New permalinks/URLs also adds the new selected page.

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. If 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**.

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.

- 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.
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.

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.


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

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 `title` 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

**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.

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.

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)
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.

- 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.
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.

Step 1. Log in to your account (as an Administrator) and click Settings.
Step 2. Click Private Sites.
Step 3. Select the site which you want to make private from the list of sites.
Step 4. Enable private sites by clicking on the toggle button (refer to the image below).

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.

   - 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.*
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.

- 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

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

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 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/. 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.
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](https://github.com/proprofs-account/sso-php). You can also download an ASP.NET version from [https://github.com/proprofs-account/sso-php](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.

```php
require_once('lib/ProProfs_SSO_Support.php');
//enter your API key here
$ProProfs_api_key = '9d1e2693fe4fc477cf26bc0df3372985';
```
Next, let's 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.

  ```php
  // 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.

  ```php
  //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.

  ```php
  //logout the end-user from ProProfs, and it will redirect to your remote auth url  
  public function logout_ProProfs(){
  ```
do_ProPros_authorization() does the heavy work and runs everytime a page is accessed on a private site but no valid ProPros session is available. This is the case in our sample implementation as it’s being called in the Auth URL.

```php
public function do_ProPros_authorization($site_access = '') {
    //If Remote logout URL is entered in ProPros the 'log-out' link can destroy the end-users session in ProPros and the session on your web application.
    $action = isset($_REQUEST['action']) ? (string)$_REQUEST['action'] : 'login';
    $logout_url = $this->ProPros_remote_url.'logout/?site='.$this->custom_ProPros_site;
    header('location:'.$logout_url);
    exit;
}
```
Now let’s look at `login.php` closely.

In this section:

```php
session_start();
$current_url = explode('?', $_SERVER['REQUEST_URI']);
$current_url = explode('/', $current_url[0]);
array_pop($current_url);
$_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 http://www.proprofs.com/knowledgebase/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.
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.

```html
<a href="http://yoursite.helpdocsonline.com/64ps4xoq2ut33mzzebrb8zfqmj8vzdj67embed=true">Link to your help site</a>
```

**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:**

```php
$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)
```
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.
Add, Edit, and Delete Users

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. Follow the steps below to:

- Add Users
- Edit User Profile
- Delete User
- Make a user Inactive

Add Users:

1. Log in to your Knowledge base administrator account and navigate to "Settings" ----> "Users." Click "+ New User" button to add a new user.

2. Enter user details in the new user form, or you can select to import user details via excel sheets. Assign roles, groups and site access. Click "Create" at the end of the form to add the user.
Edit User:

1. Click any user's name from the list to edit their profile.

2. The user profile will load up- similar to the new user form, with additional option to change the password for that user. Make the necessary changes and click "Save" to secure the changes.
**Delete User:**

To delete a user, click the "Delete" button for that user in the 'all users' list. A pop-up, seeking confirmation will appear, select "Yes" to delete the user.

**Make a user inactive:**

To make a user inactive, click the Inactive button for that user in the 'all users' list. A pop-up, seeking confirmation will appear, select "Yes" to make the user inactive.
## User Management

### User List

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Role</th>
<th>Group</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bruce Clark</td>
<td><a href="mailto:clark.brce@gmail.com">clark.brce@gmail.com</a></td>
<td>Admin</td>
<td></td>
<td>Active</td>
</tr>
<tr>
<td>Katie Emerson</td>
<td><a href="mailto:katie@gmail.com">katie@gmail.com</a></td>
<td>Editor</td>
<td></td>
<td>Active</td>
</tr>
<tr>
<td>Ben Jones</td>
<td><a href="mailto:jonesben@gmail.com">jonesben@gmail.com</a></td>
<td>Editor</td>
<td>Editors</td>
<td>Active</td>
</tr>
<tr>
<td>Chris Hook</td>
<td><a href="mailto:hookchrist@gmail.com">hookchrist@gmail.com</a></td>
<td>Editor</td>
<td>Editors</td>
<td>Active</td>
</tr>
</tbody>
</table>

### Related Articles:
- Roles & Permissions
- How Do I Delete Users and Their Information?
- Workflow Rules
Roles & Permissions

Roles and 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.

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.

Each role can perform a certain set of tasks, called Permissions.

Here’s the permissions chart for each role:

<table>
<thead>
<tr>
<th>Permissions</th>
<th>Administrator</th>
<th>Editor</th>
<th>Contributor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add New Folders</td>
<td>✅</td>
<td>✅</td>
<td></td>
</tr>
<tr>
<td>Delete folders</td>
<td>✅</td>
<td>✅</td>
<td></td>
</tr>
<tr>
<td>Edit Folders</td>
<td>✅</td>
<td>✅</td>
<td></td>
</tr>
<tr>
<td>Add Pages</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Edit Pages</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Publish Pages</td>
<td>✅</td>
<td>✅</td>
<td></td>
</tr>
<tr>
<td>Delete Pages</td>
<td>✅</td>
<td>✅</td>
<td></td>
</tr>
<tr>
<td>View All Pages</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Add Tooltips</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Edit Tooltip</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Delete Tooltip</td>
<td>✅</td>
<td>✅</td>
<td>✅</td>
</tr>
<tr>
<td>Access Settings</td>
<td>✅</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.
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 check mark 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**

![Custom Status Image]

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**

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.
### 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.
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.

**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.

Step 4: In the next screen that pops up, define the roles and permissions of the group members. You can also override the current permissions. When you are done setting the roles and permissions, click Submit.
Once you've have completed and saved all the steps above, you will be able to efficiently manage and collaborate with multiple writers and editors to create your knowledge base. If you wish to make changes to the group you created like remove or add users, change the group name, or alter user roles, click **Edit** under the group name.

**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.
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.

<table>
<thead>
<tr>
<th>Users</th>
<th>Webites</th>
<th>Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 A, B</td>
<td>Design, Development,</td>
<td></td>
</tr>
<tr>
<td>2 B</td>
<td>Development</td>
<td></td>
</tr>
<tr>
<td>3 A, E</td>
<td>Design, Product</td>
<td></td>
</tr>
<tr>
<td>4 B, C</td>
<td>Development, SEO</td>
<td></td>
</tr>
<tr>
<td>5 A, B, C, D</td>
<td>Design, Development, SEO, Content</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Firstname</th>
<th>Lastname</th>
<th>Email</th>
<th>Role</th>
<th>Group (Optional)</th>
<th>Access Sites (0 =&gt; No 1 =&gt; Yes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td><a href="mailto:1@sample.com">1@sample.com</a></td>
<td>Editor</td>
<td>Design, Development,</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>2</td>
<td><a href="mailto:2@sample.com">2@sample.com</a></td>
<td>Admin</td>
<td>Development</td>
<td>0</td>
</tr>
<tr>
<td>3</td>
<td>3</td>
<td><a href="mailto:3@sample.com">3@sample.com</a></td>
<td>Viewer</td>
<td>Design, Product</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td>4</td>
<td><a href="mailto:4@sample.com">4@sample.com</a></td>
<td>Contributor</td>
<td>Development, SEO</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td>5</td>
<td><a href="mailto:5@sample.com">5@sample.com</a></td>
<td>Admin</td>
<td>Design, Development, SEO, Content</td>
<td>0</td>
</tr>
<tr>
<td>6</td>
<td>6</td>
<td><a href="mailto:6@sample.com">6@sample.com</a></td>
<td>Editor</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

**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.

Step 4: Scroll down to the bottom and click Create to finish the process of adding a new user.
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**.

**Step 2.2:** Enter a group name and click **Next**.

**Step 2.3:** Select a user as the group admin and click **Next**.
Add Admin to this Group  (Step 2 of 4)

Search users by email

Step 2.4: Add users to the group and click **Next**.
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.
Step 2.6: Select the help sites your users/group can access and submit.
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**.
Step 2.1: Edit your company details if required and Save, else, 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.
<table>
<thead>
<tr>
<th>Plan</th>
<th>Price</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FREE</td>
<td>$0</td>
<td>Build a public knowledge base to support customers.</td>
</tr>
<tr>
<td>ESSENTIALS</td>
<td>$0.20</td>
<td>Page/month (billed annually)</td>
</tr>
<tr>
<td>PREMIUM</td>
<td>$0.40</td>
<td>Build unlimited public or private knowledgebases with secure access. Includes advanced features such as API, white label &amp; more.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>200 Pages</th>
<th>200 Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$480/Year</td>
<td>$384/Year</td>
</tr>
<tr>
<td></td>
<td>$960/Year</td>
<td>$768/Year</td>
</tr>
</tbody>
</table>

Note: Discounts applied for annual billing.
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

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.

---

**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.

  Active API tokens (2)

  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.

  Active API tokens (2)

  Add API token

- Enter the **API token description** and copy the API token as mentioned. Click **Save**.
**Step 4:** Return to your ProProfs Knowledge Base account,

- Enter the following details in the popup window:

  - **Zendesk Subdomain:**
  - **Email:**
  - **Token:**

- Click ‘**Next**.’ On the next page, you will see a list of articles associated with your Zendesk account.
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.
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.


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 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.
**Step 3:** The following confirmation message will appear after a PDF file is successfully imported. Click **OK** to acknowledge the message.

![File Successfully Imported](image)

**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.
Here’s an example of how the Footer appears at the bottom of a webpage. Click **Save & Done** to save the changes.

**Step 3:** If you want, you can even enable and disable the Footer. To do that, click the **settings** icon on the page editor.
Step 4: Enable or disable the Footer option as per your preference.

**Basic**
- Page Type: Text
- Author: ProProfs Help IQ
- 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

**Advanced**
- Search engines: Allow page to be crawled by search engines (Google, Yahoo, Bing)
- Feedback: Enable / Disable
- Footer: Enable / Disable

Sample Code | HTML
```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/">
                        <img src="https://www.proprofs.com/api/includes/global/images/allproductlogo/KB.png?v=2" style="width: 130px;">
                    </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>
                        </a></li>
                    </ul>
                </div>
            </div>
        </div>
    </div>
</div>
```
Sample Code | CSS

```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;
```
How to Configure In-App Help Widget for Your Website

**Help Widget** is a web application that you can embed on your webpages. 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

Once configured, the Help Widget appears on the right-hand side of the webpage as a small **Help** icon.

Following is the final outcome when you expand the **Help** Icon.
To create a help widget, follow the steps below:

**Step 1.** Go to **Settings >> In-App Help** from your ProProfs Knowledge Base dashboard.
Step 2. The screenshot below shows how to group help articles to create a widget.

1. Select the articles or pages you want to add to the help widget.
2. Click Submit Pages.
3. Click **Preview** to see how the widget will appear with the articles you’ve added.

**Step 3.** Copy the code and embed it into your website to successfully add your help widget.

**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.

- 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**.
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**.
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.

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, mult-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.
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** - 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 *

email

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.

- **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.
• **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.

- **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.
• **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.

- 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.

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.
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.
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 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.

- **Show placeholder text in form fields** - Select this option is you want placeholder text to be in the form fields.

At this time only topics from your ProProfs site are suggested.
- **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.

![Support Tab](image)

The tab’s text and color can be customized and branded.

- **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 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.

- **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.
- **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.
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.
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.
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.

![Custom Form Interface]

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.

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 to 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 it.

You can also update your ProProfs header to match whatever header you create in the Help Center.
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.

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

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 a "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 it. 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 simplier 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

   ![Customize design panel](image)

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:

   ```html
   <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
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.

- 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 and copy the below code and paste it in:

```javascript
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.

![API Key](image)

In order for your end-users to view a site the API key must be passed.

7. Now go back to Zendesk and in the code you just pasted in located the code:

```javascript
var ProProfs_hash = 'Private site API key';
```

Select the text *Private site API key* and paste in your API key, overwriting the text. Make sure you do not delete the `"` as this syntax is needed by the JavaScript.

8. Now go back to Zendesk and in the code you just pasted in located the code:

```javascript
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

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.
6. Select all text in the **Zendesk Search Widget** box, then right-click and select **Copy**.

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.
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).
2. Select **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.

---

**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.

6. Select all text in the Post to ProProfs Widget box, then right-click and select Copy.
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**.
4. Enter the widget information.

**Custom widget**

<table>
<thead>
<tr>
<th>Title</th>
<th>Post to ProProfs</th>
</tr>
</thead>
</table>

- 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).
2. Select **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.)
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.

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

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

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.
6. Select all text in the **Documentation Tab** box, then right-click and select **Copy**.

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.
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**

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.

- For the **Title** enter "ProProfs Tab".
- For **Available for** select who you want to be able to see the documentation tab.
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.

```javascript
// 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.

```javascript
(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_documentation.active").length) {
            jQuery("div#top-menu ul#green li.tab_documentation").addClass("first");
        }
    }
})();

Related Articles:

- Zendesk Header
- Zendesk Support Widget
- Zendesk Single Sign-On
Zendesk Header

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.
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.

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.

- **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

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.

- **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.
6. Select all text in the **Forum Search** box, then right-click and select **Copy**.

---

**Zendesk Integration**

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.

---

**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.
3. From the list of available widgets, select **Global JavaScript**.

4. Enter the widget information.

   - For the **Title** enter "ProProfs Forum Search".
   - For **Available for**, change to **Anyone, including people who have not logged in**.
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.

- 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.

```
gwguy0htvlg9
```

Regenerate

1. Select all the text in the **Documentation Tab** box, then right click and select **Copy**.
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**

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.

- For the **Title** enter "ProProfs Tab".
- For **Available for**, change to **People who have logged in** (or one of the other logged-in statuses).
- 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 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.

- **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.
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.
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 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 is 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 browser's window.

The tab's text and color can be customized and branded.

- **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.

<table>
<thead>
<tr>
<th>Lightbox Hyperlink</th>
<th>Pop-up Hyperlink</th>
<th>Embed Code</th>
</tr>
</thead>
</table>

- **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.
- **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:

```javascript
jQuery( document ).ready(function() {
    var hiqimg=document.createElement("img");
    hiqimg.setAttribute('src', 'https://yoursitename.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
Create and Delete a User via API

You can implement an API that will create and delete user to the Knowledge Base

In this article, you'll learn:

1. Create user API
2. Delete user API

1. How to Create 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

<table>
<thead>
<tr>
<th>Name</th>
<th>Required</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>api_key</td>
<td>Yes</td>
<td>String</td>
<td>Your private API key for the FAQ. The API key is available at: Settings &gt; In-App Help &gt; API key</td>
</tr>
<tr>
<td>action</td>
<td>Yes</td>
<td>String</td>
<td>Action of the API “create”</td>
</tr>
<tr>
<td>users</td>
<td>Yes</td>
<td>String/Array</td>
<td>You can create one user at a one time. Sample like email, name, role, access_sites, group</td>
</tr>
</tbody>
</table>

1. role: It can be any value from ‘Admin’, ‘Editor’, ‘Contributor’, ‘Viewer’.

2. access_sites: 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 give access to any of the sites (it can be used when you don’t want to give access to all the sites, but wanted to give access according to any group)

3. group: Pass the group names here separated by comma (if more than one)

Sample Code | JSON

```
Accept: application/json
Content-Type: application/json
{
    "api_key": "<your API key>",
    "action": "create",
}
```
 Sample Code | PHP Script

```php
$data = array();
$data['api_key'] = '<your API key>';  
$data['action'] = 'create';
$users = array('email'=>'sample@mycompany.com','name'=>'Sample','role'=>'Contributor','access_sites'=>0,'group'=>'groupName1,groupName2');
$data['users'] = array($user1);
echo json_encode($data);
```

**Response Format**

**JSON**

**Example Response [Success]**

```json
{
    "status": "SUCCESS",
    "msg": "User added successfully"
}
```

<table>
<thead>
<tr>
<th>Name</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>status</td>
<td>Success</td>
</tr>
<tr>
<td>msg</td>
<td>User added successfully</td>
</tr>
</tbody>
</table>

2. How to delete 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**

<table>
<thead>
<tr>
<th>Name</th>
<th>Required</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>api_key</td>
<td>Yes</td>
<td>Your private API key for the FAQ. The API key is available in the manage account section of the super admin.</td>
</tr>
<tr>
<td>action</td>
<td>Yes</td>
<td>Action of the API &quot;delete&quot;</td>
</tr>
<tr>
<td>users</td>
<td>Yes</td>
<td>Enter email id of the user which you want to delete.</td>
</tr>
</tbody>
</table>

**Note:** We can't delete master user from this API.

### Sample Code | JSON

```json
Accept: application/json
Content-Type: application/json
{
    "api_key": "<your API key>",
    "action": "delete",
    "user":
    {
        "email": "sample@mycompany.com"
    }
}
```

### Sample Code | PHP Script

```php
$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]**

```json
Content-Type: application/json
[
    {
        "status": "SUCCESS",
        "msg": "User deleted successfully"
    }
]
```

<table>
<thead>
<tr>
<th>Name</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>status</td>
<td>Success</td>
</tr>
<tr>
<td>msg</td>
<td>User deleted successfully</td>
</tr>
</tbody>
</table>

**Related Articles:**

- Integrate Salesforce Desk with Knowledge Base
- Integrate LiveChat with Knowledge Base
Integrate Olark with Knowledge Base
Desk.com Integration With ProProfs Knowledge Base

How does this integration help me?

Desk.com’s all-in-one support app has everything a fast-growing business needs to provide fast, awesome customer service. By integrating ProProfs and Desk, you'll have the power of ProProfs Knowledgebase and the reliability of Desk for your customer support. With a single click, your customers can fill out the support form in your knowledgebase and the data will automatically be sent to Desk where a case will be created. Setup is also a breeze as ProProfs uses the case fields from your Desk account.
Collect feedback and support requests

Customers can submit a support request directly from your ProProfs site using the Support Widget. Save your customers from having to locate your contact details or support email. Use the ProProfs form to collect support tickets, feedback, feature requests, and much more. You can even add this form to your external websites or apps.

Embed forms in Desk.com or your website

Embed the Case Widget anywhere in your Desk’s Support Center or use it in your website or web application.

Search suggestions (ticket deflection)

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 it up?

- 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. Select Desk, add your credentials and click on next.

- **Username** - Enter your Desk.com username such as johndoe@xzy.com. This can be any valid Desk username.

- **Subdomain** - Enter your Desk account URL such as company.desk.com

**API Key/Token and Token Secret** - The Support Widget will submit the data to Desk via API. The first step is to fill in the API credentials. This can be found by:
  - Log into Desk.com. From the top navigation select **Settings**.
Then on the upper right look for **Settings**.

On the left side navigation select **API**.

Now from the API page click **Add API Application**.

It will open an overlay to create an API key. For the **name** enter 'ProProfs' and for the **website URL** enter your ProProfs site URL such as http://mysite.helpdocsonline.com. You do not need to enter in a Callback URL or a Support URL.
Click **Add**. The form will save and display your **API key** and **API secret**. Copy these values and paste them into ProProfs.

Next, Desk requires some additional credentials. Click on **Your Access Token**.

An overlay will appear. Copy the **Token** and **Token Secret** and paste into ProProfs.
After you fill in your credentials, click **next**.

**Create the Support Form**

After you enter in your credentials and click next, ProProfs will connect to Desk 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](image)

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 Desk. You can leave as is or rename (this will not affect your help desk).

• **Type** - The field type as provided by Desk (text, email, mult-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.

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 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.

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 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 browsers window.

The tab’s text and color can be customized and branded.

• **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.

- **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.
- **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:

- SalesForce
- Google Analytics
- Google Fonts
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.
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.

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
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-xxxxxxxx-x code.

![Google Analytics](image)

To run Google Analytics for this site, paste in your tracking code. Learn more

UA-1820368-1 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/](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-xxxxxxxx-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. 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-xxxxxxxx-x.
Tracking internal site searches

Your ProProfs site comes with a robust search feature that instantly makes your 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 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**

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.
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 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.

```css
body {
    background-color: #FFF;
    font-family: Verdana, Arial, Helvetica, sans-serif;
    font-size: 13px;
    padding: 10px 65px 35px 25px;
    margin: 0px;
}
.tip {
    background: #FFF5D9;
    padding: 5px;
    line-height: 1.6em;
    width: 85%;
}
/*Info box. Apply it by 'styles > Info' in the editor */
.info {
    background: #d2efc url(/images/info.png) 5px 50% no-repeat;
    padding: 5px 30px;
    line-height: 1.6em;
    width: 85%;
}
/*Warning box. Apply it by 'styles > Warning' in the editor */
.warning {
    /* Revert to default CSS */
}
```
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."
**Step 3.** Select "Integrate."

**Step 4.** Under "Google Translate", you would need to add language codes for the languages you want on your site.
Step 5. Follow this link for the list of language codes. See the image below.

<table>
<thead>
<tr>
<th>Language</th>
<th>ISO-639-1 Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Afrikaans</td>
<td>af</td>
</tr>
<tr>
<td>Albanian</td>
<td>sq</td>
</tr>
<tr>
<td>Amharic</td>
<td>am</td>
</tr>
<tr>
<td>Arabic</td>
<td>ar</td>
</tr>
<tr>
<td>Armenian</td>
<td>hy</td>
</tr>
<tr>
<td>Azerbaijani</td>
<td>az</td>
</tr>
<tr>
<td>Basque</td>
<td>eu</td>
</tr>
<tr>
<td>Belarusian</td>
<td>be</td>
</tr>
<tr>
<td>Bengali</td>
<td>bn</td>
</tr>
<tr>
<td>Bosnian</td>
<td>bs</td>
</tr>
<tr>
<td>Bulgarian</td>
<td>bg</td>
</tr>
<tr>
<td>Catalan</td>
<td>ca</td>
</tr>
<tr>
<td>Cebuano</td>
<td>ceb (ISO-639-2)</td>
</tr>
<tr>
<td>Chichewa</td>
<td>ny</td>
</tr>
</tbody>
</table>

Step 6. Add the language codes in Google Translate text box from Step 4. For multiple languages, separate the codes with a comma without any space.
Step 7. Once you’re done, click save and open your site in a fresh tab.

Step 8. The languages you add would appear as shown below.

Related Articles:
<table>
<thead>
<tr>
<th>Integrations</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SalesForce</strong></td>
</tr>
<tr>
<td><strong>Google Fonts</strong></td>
</tr>
<tr>
<td><strong>Google Analytics</strong></td>
</tr>
</tbody>
</table>
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.

1. Copy and paste this code before the closing \textit{</body>} tag on every page of your website.

   \begin{verbatim}
   <!-- Start of LiveChat (www.livechatinc.com) code -->
   <script type="text/javascript">
   window._lc = window._lc || {};
   window._lc.license = 31991678;
   (function() {
     var lc = document.createElement('script'); lc.type = 'text/javascript'; lc.async
   \end{verbatim}

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.

**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.

**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**.
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.

- 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.

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.

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.

![JavaScript code](https://example.com/js-code.png)
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.
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.

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.
<table>
<thead>
<tr>
<th>Related Articles:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Olark</td>
</tr>
<tr>
<td>SnapEngage</td>
</tr>
<tr>
<td>ProProfs Chat</td>
</tr>
</tbody>
</table>
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.

  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
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
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!

**Related Articles:**

JIRA
Disqus
Yammer
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 your 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.

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.

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

You can find the shortname from the Admin section of your Disqus account.
<table>
<thead>
<tr>
<th>Integrations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wufoo</td>
</tr>
<tr>
<td>ProProfs Chat</td>
</tr>
<tr>
<td>Yammer</td>
</tr>
</tbody>
</table>
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.”
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: proprofs.com

Feed Id: 1164761

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.

```html
Code extract: <div id="yammer-feed" style="height:400px;width:500px;">
</div>
```

Here's how the snippet will appear:
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.
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, navigate 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 remove 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.
**Step 5.** Scroll down and click on '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'.

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:

![Survey Example]

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**.
Step 4: Select the form and click on **Save** or **Create** a new Survey Form by clicking on **Create Survey**.

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, navigate to **Settings >> ProProfs Knowledge Base**.

**Step 2:** Click on **Remove Survey**. The Survey form will remove form your Knowledge Base help site.
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.
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
- Assign users to an app

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.

**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 who is 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](#)

**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
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.
**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?

<table>
<thead>
<tr>
<th>Articles</th>
<th>Reads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a Knowledge Base</td>
<td>96</td>
</tr>
<tr>
<td>Single Sign-On (SSO)</td>
<td>81</td>
</tr>
<tr>
<td>Add and Customize a Site</td>
<td>79</td>
</tr>
<tr>
<td>Guide to the Content (WYSIWYG) Editor</td>
<td>77</td>
</tr>
<tr>
<td>Pop-Up Window</td>
<td>73</td>
</tr>
<tr>
<td>Introduction to Conditional Content?</td>
<td>71</td>
</tr>
<tr>
<td>Lighbox</td>
<td>70</td>
</tr>
<tr>
<td>Menu and Navigation Tour</td>
<td>61</td>
</tr>
<tr>
<td>Introduction to Contextual Help</td>
<td>58</td>
</tr>
<tr>
<td>Roles and Permissions</td>
<td>56</td>
</tr>
</tbody>
</table>

Showing 1 to 10 of 128 entries

**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.
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.
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.

<table>
<thead>
<tr>
<th>Keywords</th>
<th>Searches</th>
<th>Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>add site</td>
<td>2</td>
<td>7</td>
</tr>
<tr>
<td>delete site</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>settings</td>
<td>2</td>
<td>60</td>
</tr>
<tr>
<td>settings and integrations</td>
<td>2</td>
<td>60</td>
</tr>
<tr>
<td>add user</td>
<td>1</td>
<td>60</td>
</tr>
<tr>
<td>adfs</td>
<td>1</td>
<td>No Result</td>
</tr>
<tr>
<td>advanced</td>
<td>1</td>
<td>17</td>
</tr>
<tr>
<td>advanced search</td>
<td>1</td>
<td>33</td>
</tr>
<tr>
<td>alphabetize</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>alphabetize folders</td>
<td>1</td>
<td>32</td>
</tr>
</tbody>
</table>

Showing 1 to 10 of 227 Keywords
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.
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.
### 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.

<table>
<thead>
<tr>
<th>Keywords</th>
<th>Searches</th>
</tr>
</thead>
<tbody>
<tr>
<td>508</td>
<td>2</td>
</tr>
<tr>
<td>99</td>
<td>1</td>
</tr>
<tr>
<td>accessibility</td>
<td>1</td>
</tr>
<tr>
<td>accessibility</td>
<td>5</td>
</tr>
<tr>
<td>adfl</td>
<td>1</td>
</tr>
<tr>
<td>adfs</td>
<td>10</td>
</tr>
<tr>
<td>adsl</td>
<td>1</td>
</tr>
<tr>
<td>analytic</td>
<td>3</td>
</tr>
<tr>
<td>analytics</td>
<td>1</td>
</tr>
<tr>
<td>encor</td>
<td>1</td>
</tr>
</tbody>
</table>
### 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.

<table>
<thead>
<tr>
<th>Articles</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Conditional Content</td>
<td></td>
</tr>
<tr>
<td>Contextual Help</td>
<td></td>
</tr>
<tr>
<td>Copy of Introduction to Conditional Content</td>
<td></td>
</tr>
<tr>
<td>Create</td>
<td></td>
</tr>
<tr>
<td>Create a Knowledge Base - Copy</td>
<td></td>
</tr>
<tr>
<td>Design Word-Class Knowledge Base</td>
<td></td>
</tr>
<tr>
<td>Editing Content</td>
<td></td>
</tr>
<tr>
<td>GDPR</td>
<td></td>
</tr>
<tr>
<td>Getting Started</td>
<td></td>
</tr>
<tr>
<td>Home - ProProfs Documentation</td>
<td></td>
</tr>
</tbody>
</table>
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.

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?

![Graph showing the number of new articles created over time](image)
**Popular Articles:** A list of articles arranged in descending order of their popularity. You can also select to arrange the list in reverse order.

<table>
<thead>
<tr>
<th>Articles</th>
<th>Reads</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>296</td>
</tr>
<tr>
<td>Single Sign-On (SSO)</td>
<td>294</td>
</tr>
<tr>
<td>Create a Knowledge Base</td>
<td>272</td>
</tr>
<tr>
<td>Add and Customize a Site</td>
<td>250</td>
</tr>
<tr>
<td>Settings</td>
<td>244</td>
</tr>
<tr>
<td>Roles and Permissions</td>
<td>238</td>
</tr>
<tr>
<td>Guide to the Content (WYSIWYG)</td>
<td>201</td>
</tr>
<tr>
<td>Introduction to Contextual Help</td>
<td>199</td>
</tr>
<tr>
<td>Introduction to Conditional Content?</td>
<td>188</td>
</tr>
<tr>
<td>Lightbox</td>
<td>171</td>
</tr>
</tbody>
</table>

**Most Liked Articles:** A list of articles arranged in order of the number of 'Up Votes' received.
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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Articles</th>
<th>Up Vote</th>
<th>Down Vote</th>
<th>Reads</th>
<th>Words_Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul</td>
<td>119</td>
<td>340</td>
<td>365</td>
<td>7853</td>
<td>488</td>
</tr>
<tr>
<td>Anton</td>
<td>12</td>
<td>4</td>
<td>2</td>
<td>235</td>
<td>49</td>
</tr>
<tr>
<td>David</td>
<td>5</td>
<td>4</td>
<td>6</td>
<td>223</td>
<td>19</td>
</tr>
<tr>
<td>Brandon</td>
<td>2</td>
<td></td>
<td></td>
<td>38</td>
<td>10</td>
</tr>
</tbody>
</table>

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 log in?

<table>
<thead>
<tr>
<th>Name</th>
<th>Last Login</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anton</td>
<td>Today</td>
</tr>
<tr>
<td>Paul</td>
<td>Today</td>
</tr>
<tr>
<td>Hilary</td>
<td>January 8, 2019 09:14 AM</td>
</tr>
<tr>
<td>David</td>
<td>December 5, 2018 05:21 AM</td>
</tr>
<tr>
<td>Will</td>
<td>November 30, 2018 05:31 PM</td>
</tr>
<tr>
<td>Marcus</td>
<td>October 26, 2018 06:10 AM</td>
</tr>
<tr>
<td>Alfred</td>
<td>July 30, 2018 06:59 AM</td>
</tr>
<tr>
<td>Nancy</td>
<td>June 28, 2018 09:32 AM</td>
</tr>
<tr>
<td>Pristine</td>
<td>June 7, 2018 06:01 AM</td>
</tr>
<tr>
<td>Virgil</td>
<td>May 30, 2018 04:52 AM</td>
</tr>
</tbody>
</table>

Here's how you can analyse your Knowledge Base Reports

Video About: How to Analyze Your Knowledge Base Reports
Broken Links

The broken links section of the knowledge base reports provides a list of all the inactive and broken links throughout the entire knowledge base. It lists the broken links along with the page titles making it easy to fix them. Here's how to access the broken links report:

Navigate to the "Reports" tab and select "Broken Links" from the vertical menu.

Here's how the broken links report appears. You can view the pages with broken links directly from the report by clicking the preview icon.

<table>
<thead>
<tr>
<th>Page Title</th>
<th>Broken Link</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Here's how you can analyse your Knowledge Base Reports

Video About: How to Analyze Your Knowledge Base
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 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
Pop-up

A pop-up is a small window that suddenly “pops up” in the foreground of the page. You can turn any ProProfs page into a pop-up and easily add it to your own website or web app. Follow this guide to learn how to use pop-ups.

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

Example of a tooltip with an image
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
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

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](#)
Security & Restrictions
Conditional Content
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.

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"

**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.
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.”
# ProProfs Knowledgebase Glossary

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>dd/edit page toolbar</strong></td>
<td>When adding or editing a page, this toolbar is located directly above the page.</td>
</tr>
<tr>
<td><strong>Settings</strong></td>
<td>Admins are users who have permission to customize ProProfs. See <a href="#">Roles</a>.</td>
</tr>
<tr>
<td><strong>All Pages</strong></td>
<td>This is a table of all the pages for your site.</td>
</tr>
<tr>
<td><strong>Company</strong></td>
<td>A company is the entity that signs up for ProProfs. For example, &quot;IBM&quot; or &quot;ABC Corp.&quot; Corporations purchase ProProfs to create documentation for their end users.</td>
</tr>
<tr>
<td><strong>Content editor</strong></td>
<td>The content editor is the tool used to type in content and create documentation. The editor tool functions much like Microsoft Word.</td>
</tr>
<tr>
<td><strong>Context menu</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>CSS</strong></td>
<td>A CSS file controls the layout and style of a page. Each site will have its CSS file that can be edited.</td>
</tr>
<tr>
<td><strong>Custom domain</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Draft page</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Edit locks</strong></td>
<td>To prevent multiple users from overwriting each other, a page will become &quot;locked&quot; when a user is editing it.</td>
</tr>
<tr>
<td><strong>Embed page</strong></td>
<td>ProProfs provides the ability to embed help pages in your own web applications and websites. This is often referred to as &quot;contextual help&quot; and saves the end-user from having to browse and locate the help page in ProProfs.</td>
</tr>
<tr>
<td><strong>Embed pop-up</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>End user</strong></td>
<td>End users are the people who are reading the documentation. They do not have login access and can only read the documentation.</td>
</tr>
<tr>
<td><strong>Google Analytics code</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Header color</strong></td>
<td>You can change the header background color of the application.</td>
</tr>
<tr>
<td>------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Header image</strong></td>
<td>You can upload your own background image for the application.</td>
</tr>
<tr>
<td><strong>Header logo</strong></td>
<td>This logo appears on the upper left-hand side of the application. Companies can upload their own logo.</td>
</tr>
<tr>
<td><strong>Image manager</strong></td>
<td>This allows you to manage images, conduct basic file operations on them (such as upload and delete), and insert the images into a page.</td>
</tr>
<tr>
<td><strong>Keyword index</strong></td>
<td>The index will contain a list of &quot;indexed&quot; 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).</td>
</tr>
<tr>
<td><strong>Lightbox</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Logged in</strong></td>
<td>Users can create and manage pages when they are logged in.</td>
</tr>
<tr>
<td><strong>Logged out</strong></td>
<td>This view of the site is what an end-user sees to read your documentation.</td>
</tr>
<tr>
<td><strong>Page</strong></td>
<td>A page is what you create for your end-users to read. Pages can be fully customized using XHTML/CSS.</td>
</tr>
<tr>
<td><strong>Page list</strong></td>
<td>This is a grid list of all the pages for your site.</td>
</tr>
<tr>
<td><strong>Page link</strong></td>
<td>A page link is a link to another page.</td>
</tr>
<tr>
<td><strong>Page status</strong></td>
<td>The status of a page is either &quot;published&quot; (viewable to end users) or &quot;draft&quot; (only viewable to logged-in users)</td>
</tr>
<tr>
<td><strong>Permalinks</strong></td>
<td>Permalinks are the Peto individual pages. These URLs never change.</td>
</tr>
<tr>
<td><strong>Pretty permalinks</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Published</strong></td>
<td>A published page is visible to a logged-out end-user.</td>
</tr>
<tr>
<td><strong>Roles</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Site</strong></td>
<td>A site is a unique set of pages. Companies can create more than one site if their subscription plan allows.</td>
</tr>
<tr>
<td><strong>Site address URL</strong></td>
<td>This will be the URL of the site. Each site will have its own URL.</td>
</tr>
<tr>
<td>----------------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Table of contents (TOC)</strong></td>
<td>The table of contents lists folders and pages in a tree format on the left-hand side.</td>
</tr>
<tr>
<td><strong>Tabs</strong></td>
<td>Each page opens in an area with tabbed views. You have the option of turning the tabbed view off.</td>
</tr>
<tr>
<td><strong>Text page</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Tooltip</strong></td>
<td>When an end-user hovers the cursor over a link, a tooltip may appear—a small &quot;hover box&quot; 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.</td>
</tr>
<tr>
<td><strong>User</strong></td>
<td>This refers to a user at a company who utilizes ProProfs to create and manage documentation. Each user is provided a username and password.</td>
</tr>
<tr>
<td><strong>Video page</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>View page toolbar</strong></td>
<td>When a user is logged in and views a page, the toolbar is located directly above the page.</td>
</tr>
</tbody>
</table>
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.

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.
5. Uncheck Create a new folder for imported pages.
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.
**Copy Site**

- **URL:** https://darkcorp.helpdocsonline.com
- **Site Name:** Clark Corp.
- **Pages:**
  - All pages
  - Specific pages

**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.
Here's how multiple-site search results appear:

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/singup
https://yourcompanyname.helpdocsonline.com/restrict
https://yourcompanyname.helpdocsonline.com/search
https://yourcompanyname.helpdocsonline.com/tcss
https://yourcompanyname.helpdocsonline.com/tooltip
https://yourcompanyname.helpdocsonline.com/topic
https://yourcompanyname.helpdocsonline.com/user
https://yourcompanyname.helpdocsonline.com/util
https://yourcompanyname.helpdocsonline.com/video
https://yourcompanyname.helpdocsonline.com/class
https://yourcompanyname.helpdocsonline.com/constructor
https://yourcompanyname.helpdocsonline.com/function
https://yourcompanyname.helpdocsonline.com/static
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.

1) Click on "Upgrade" button located on the top-right hand corner of your dashboard.

2) Select the plan, you want and click on "Upgrade".

To downgrade your account, please contact our sales team by email or call (855) 776-7763

Suggested Readings: Purchasing ProProfs KnowledgeBase
Cancel Your Account

To cancel your account, follow these steps:

2. Click **Settings**.
3. Click **My Account**.
4. Click **Cancel Account**.
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 cancelation. **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 *

Password

Last Name *

Phone Number

Credit Card Number

Expiration Date

CVV

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.proprofs.com/knowledgebase/login/
2. Click Settings.
3. Click Manage 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.
<table>
<thead>
<tr>
<th>Invoice Number</th>
<th>Date</th>
<th>Total</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>3680</td>
<td>February 27, 2014</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3504</td>
<td>January 27, 2014</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3334</td>
<td>December 27, 2013</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3163</td>
<td>November 27, 2013</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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** http://www.proprofs.com/knowledgebase/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
Submit A Ticket
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