Configuring subscriptions

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The configuration options in this section will help you set up subscriptions in your knowledge base.

Requirements to turn on subscriptions

To turn on subscriptions, you'll need to:

1. Make sure you have at least one **SMTP service** configured in **Account > SMTP. You must use your own or a third party SMTP server to send subscription emails.**

2. Configure the **email schedule and subject** for notification emails.

3. Update **KB settings > Subscriptions** to use the desired SMTP and send a test email to be sure everything's working properly.

4. Edit your subscription settings to **enable subscriptions.**

5. Enable spam protection for public subscriptions. By default, subscriptions are only enabled for logged-in readers. If you have a fully public or mixed public-and-private knowledge base and you want viewers who aren't logged in to be able to subscribe, enable this option.

   a. Depending on your **spam protection settings,** you may need to make adjustments in **Security and access > Spam protection.** The page will warn you if there's anything else you need to do.

> **Look before you leap**
> **You must complete steps 1-4 for subscriptions to work properly. You'll need the SMTP details for your email server before you begin this process.**

Set the subscription notification schedule and email subject

To turn on subscriptions, you'll configure a global notification schedule and email subject line.

To do so:

1. Go to **KB settings > Subscriptions.** These settings are all in the **Subscription Settings** section at the top of the page.

2. For the **Email Schedule,** choose to send emails on either a Daily basis or on a Weekly basis.

> **When subscription emails are sent**
> Regardless of the email schedule you select, subscription notification emails are only sent if there is New or Updated content to notify subscribers about. Refer to **Triggering/retriggering subscriptions** for more information.

   a. To send subscription notifications every day, select **Daily** from the dropdown.

   b. To send subscription notifications once a week, select the day of the week you'd like to send the emails from the dropdown.

3. Use the second dropdown to select the time of day you'd like the emails to send. All times used in this schedule are U.S. Eastern timezone.

> **Scheduled job timing**
> Emails generally send between :10 and :15 after the hour that you've selected.

4. The default email subject for notification emails is:

```
{{kbName}} Update for {{prettyDate}}
```

The **kbName** mergecode displays your knowledge base name as it appears in **KB settings > Basic.** The **prettyDate** merge code displays the date as "Month day" (e.g. February 19th). You can modify the subject however you'd like.

5. Be sure to **Save** once you've made these changes!

Set up SMTP for subscriptions

The KnowledgeOwl subscription notification system uses your own or a third-party SMTP email server to send email notifications. Before you enable subscriptions in your knowledge base, you'll need to configure the SMTP settings so that KnowledgeOwl can talk to your SMTP server.
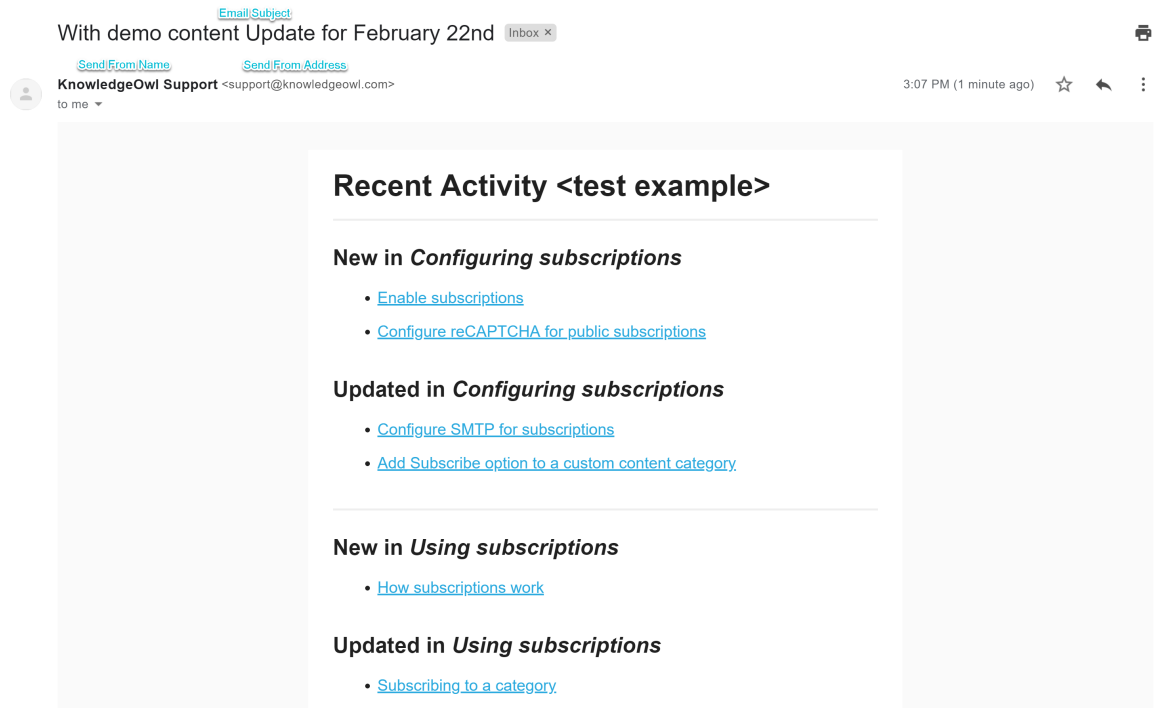
> **SMTP service required**
> Before you can set up SMTP for your Subscriptions, a knowledge base admin must set up an account-wide SMTP service to use. Refer to **SMTP** for more information!

Once you have at least one SMTP service configured in your account:

1. Go to **KB settings > Subscriptions.**

2. In the **SMTP Settings** section, select the SMTP configuration you'd like to use from the **Custom SMTP** dropdown. The dropdown displays the Friendly Names set up for the **SMTP** services in your account.

> Select the Custom SMTP service to use from the **Custom SMTP** dropdown.

3. Select the **Send Test Email** button to send a test Subscription email. This helps to confirm that the SMTP has been properly configured. (And it helps you see a sample of what the emails look like!)

   a. Once you select **Send Test Email,** the **Send Test Email Using SMTP** modal opens.

   b. Enter the **Test recipient email address** you'd like to send the test email to. For **Azure OAuth2 SMTP services**, you'll need to send the test to another Azure email.

   c. Select **Send Email.**

   d. If you receive a message that the email failed, this likely means there's something wrong with your SMTP configuration overall. You may need an IT admin to help troubleshoot your SMTP configuration. Refer to **SMTP** for more detailed instructions on working with different SMTP services. Error messages should be one of two types:

      - **Basic validation:** We'll alert you if the email addresses you've entered don't follow standard email address conventions or if required fields have been left blank.

      - **SMTP provider validation:** If the error comes from the call to your SMTP provider, we'll return the error message they provide.

   e. If everything is properly configured, an "Email sent successfully!" confirmation message displays.

   f. The test email is sent from the address set as your SMTP service's **Send From Address,** with a subject line matching the **Email Subject** defined in the **Subscription Settings** section. It should look something like this:

With demo content Update for February 22nd   Inbox ✕   🖨

👤 **KnowledgeOwl Support** <support@knowledgeowl.com>   3:07 PM (1 minute ago)   ☆   ↩   ⋮
      to me ▾

Recent Activity <test example>

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- Configure reCAPTCHA for public subscriptions

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- Add Subscribe option to a custom content category

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4. **Save** your changes to come back and finish the setup later, or finish **enabling subscriptions** now!

Set up public subscriptions

By default, subscriptions will only be enabled for logged-in readers only.

If you have a knowledge base that is partially or fully available to the public (e.g. doesn't require people to log in to read content), you might want to enable subscriptions for readers who aren't logged in. We call these Public Subscriptions.

Setup for knowledge bases with honeypot spam protection

If you are using honeypot **spam protection**, to enable public subscriptions:

1. Go to **KB settings > Subscriptions.**

2. In the **Public Subscriptions** section, check the box to **Enable subscriptions for readers on public knowledge base.**

3. Be sure to **Save** your changes.

Setup for knowledge bases with reCAPTCHA spam protection

If you're using reCAPTCHA spam protection with a KnowledgeOwl subdomain (such as support.knowledgeowl.com), skip to step 2 below.

If you're using reCAPTCHA spam protection with a private domain for your knowledge base (such as help.our-amazing-company.com), you'll need to add a reCAPTCHA for your public subscriptions. We require this to prevent bot traffic:

1. Be sure you have a V2 reCAPTCHA key and secret added to **Security and access > Spam protection**. Refer to **Add reCAPTCHA** for more details.

2. Go to **KB settings > Subscriptions**.

3. In the **Public Subscriptions** section, check the box to **Enable subscriptions for readers on public knowledge bases (no login)**.

4. Be sure to **Save** your changes.

The Subscribe button will now be visible to anyone viewing your knowledge base, whether they've logged in or not.

Enable subscriptions

Once you've edited your Email Schedule and Subject to your liking, set up and tested your SMTP, and (optionally) enabled Public Subscriptions, you're ready to turn on Subscriptions.

To enable subscriptions:

1. Go to **KB settings > Subscriptions**.

2. Next to **Enable / Disable**, check the box to **Enable reader subscriptions**.

3. Be sure to **Save** your changes.

At this point, subscriptions are live! Use the New/Updated callouts to trigger subscriptions to send.

> ⚠️🦉 **Complete all steps first**
> Don't enable reader subscriptions until you've set up and tested your SMTP. Without a valid SMTP configuration, no emails will be sent.

Add Subscribe button to topic and custom content categories

Subscribe buttons are automatically added to most category landing pages, but they won't appear on topic display or custom content categories without a little encouragement.

If you'd like to add a Subscribe button to a custom content category or topic display category and have it float next to the category header (as is the default for standard categories), it's a two-step process:

1. Create a snippet that will generate the Subscribe button.

2. Add that snippet to the categories where you want the Subscribe button to appear.

To do so:

1. Go to **Snippets**.

2. Select + **Create New Snippet**.

3. Enter a **Snippet Name,** like "Custom Content Subscribe Button". The **Merge Code Name** will be automatically generated from that Snippet Name, though you can adjust it if you'd like.

4. Enter a **SnippetDescription,** like "This snippet adds the Subscribe button to custom content categories and topic display categories it's added to. It positions the button in the category header. For custom content categories, insert the snippet anywhere into the body of the category; for topic display categories, paste the snippet merge code into the category description."

5. Select the **Snippet Content** dropdown and choose **Code Editor:**

Gif showing the Snippet Content dropdown selection. Hover over to play.

6. Copy the script below and paste it into the Code Editor:

```
<p>[template("cat-subscribe")]</p>
<script>
 $(function() {
  $(".ko-cat-sub-cntr").insertBefore($(".hg-article-header h1"));
 });
</script>
```

7. In **Visibility,** check the box to **Hide from PDFs.**

8. Select **Create.**

With your snippet created, you can now add it to the categories you wish:
- For custom content categories, use the Insert Snippet editor control to add the snippet anywhere in the custom content category body.
- For topic display categories, copy the snippet merge code and paste it directly into the category's description.

This Subscribe button will inherit the styling for Subscription buttons across your site. You can also Style the Subscribe button differently.

Alternatives

If you'd rather display the Subscribe button in the body of the category content, instead of floating next to the header, copy the merge code below and add it wherever you'd like the button to display:

```
[template("cat-subscribe")]
```

This adds a float-right Subscription button wherever you've placed the template code.

Style the Subscribe button differently

There are two CSS classes that impact the Subscribe button:
- `.btn.btn-default.ko-cat-sub` : This is the styling for the button itself. So if you'd like to change the button styling in some way, here's where you do it. This might include: background color, the color (for the text), the border, box-shadow, or padding between the text and the button edges.
- `.ko-cat-sub-cntr` : This container is what gives the Subscribe button its float: right positioning and the margin-right. If you'd like to change button positioning on the page, you'll want to add custom CSS for this class.

To adjust the style for the button:

1. Go to **Settings > Style.**

2. Below the preview pane, be sure **Custom CSS** is selected.

3. Copy the default styling for the button from here and paste it into your Custom CSS:

```
.btn.btn-default.ko-cat-sub {
    background: #fff; /* Button color */
    color: #333; /* Subscribe font color */
    border: 1.5px solid #555; /* Button border--#555 sets the color */
    box-shadow: none;
    padding: 8px 18px;
}
```

4. **Edit** as necessary to get the look and feel you want.

5. **Save** your changes.

For example, here, we've added CSS to style the Subscribe button font color and button border to match the color we use across our theme:

```
.btn.btn-default.ko-cat-sub {
    color: #1d284f; /* Change button font color to KO theme*/
    border: 1.5px solid #1d284f; /* Change border color to KO theme*/
}
```

Force readers to subscribe with their reader account email address

By default, when readers subscribe to a category, they will first see a pop-up where they can enter the email address of their choice. This is by design, since some of our customers have readers who share accounts (such as one reader account per client, consulting firm, partner, etc.).

But if you always require your readers to have their own email address, you can bypass the screen where they enter an email address entirely, and take them straight to the Manage Subscriptions page.

This approach has a few advantages:
- **It's more foolproof.** There's no risk that they'll enter an improperly-formatted email address, or one with a typo in it.
- **It's faster.** It removes the extra step to enter an address and click another button before they're subscribed.
- **It prevents the use of personal email addresses.** You may have security or compliance reasons why you don't even want links to your knowledge base content to be emailed to non-work email addresses.

> **Note: you cannot make these changes if you are using Public Subscriptions.**

To make these changes:

1. Go to **Settings > Style.**

2. Below the Preview pane, be sure **Custom HTML** is selected.

3. Next to the **Custom HTML** dropdown, be sure **Body** is selected.

4. Copy the code below and paste it into the bottom of the Custom HTML editor:

```
<script>
  $('.documentation-article .ko-cat-sub').click(function(){
      $('#subscription-modal form').submit();
  });
</script>
```

5. Now select **Custom CSS** below the Preview pane.

6. Copy the CSS Below and paste it anywhere into the Custom CSS section:

```
/* Hide the Subscription modal by default */
#subscription-modal {
    display: none !important;
}
```

7. **Save** your changes.