



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 your **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!

Configure 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.



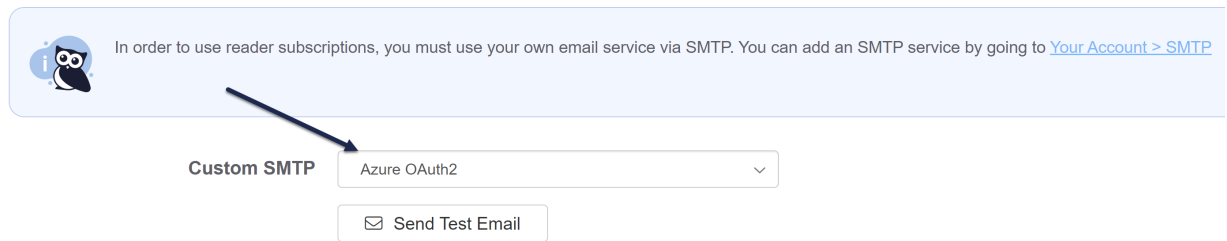
Before you can set up SMTP for your Subscriptions, you must set up an account-wide SMTP service to use. See [SMTP](#) for more information!

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

1. Go to **Settings > Subscriptions**.

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

SMTP Settings



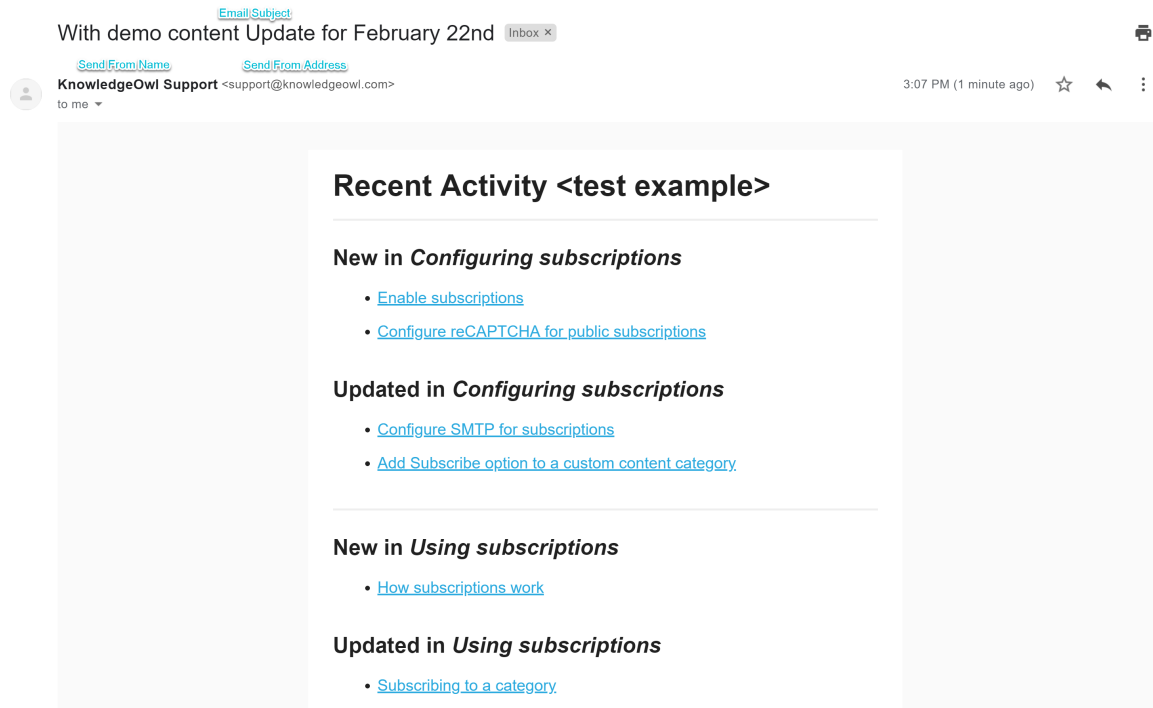
3. Click the **Send Test Email** button to send a test Subscription email. This helps to confirm that the SMTP has been properly configured. (And it helps you see a sample of what the emails look like!)
 - a. Once you click the button, a pop-up will open where you can enter the email address you'd like to send the test to. For **Azure OAuth2 SMTP services**, you'll need to send the test to another Azure email.
 - b. Enter the test recipient email address and click **Send Email**.



- c. 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. See **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.
- d. If everything is properly configured, you'll see a confirmation message:



- e. You should receive an email with the subject line matching the **Email Subject** defined in the **Subscription Settings** section, from the address specified in your SMTP service's **Send From Address**. It should look something like this:



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

Configure 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.

Enabling public subscriptions in knowledge bases using honeypot spam protection

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

1. Go to **Settings > Subscriptions**.
2. In the **Public Subscriptions** section, check the box next to **Enable subscriptions for readers on public knowledge bases**

Public Subscriptions



A spam protection method is required for readers who are not logged in to protect against subscription signups by bots. Private domains may setup reCAPTCHA via [Settings > Basic](#). Choose honeypot spam protection in [Settings > Basic](#) if you do not wish to use reCAPTCHA.



Enable subscriptions for readers on public knowledge bases (no login)

The Public Subscriptions section

3. Be sure to Save.

Enabling public subscriptions in knowledge bases using reCAPTCHA spam protection

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

If you are using reCAPTCHA [spam protection](#) with a private domain for your knowledge base (such as help.our-amazing-company.com), you will 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 [Settings > Basic > Spam Protection Settings](#). See [Add reCAPTCHA](#) for more details.
2. Go to [Settings > Subscriptions](#).
3. In the **Public Subscriptions** section at the bottom of the page, check the box next to "Enable subscriptions for readers on public knowledge bases (no login)".

Public Subscriptions



A spam protection method is required for readers who are not logged in to protect against subscription signups by bots. Private domains may setup reCAPTCHA via [Settings > Basic](#). Choose honeypot spam protection in [Settings > Basic](#) if you do not wish to use reCAPTCHA.



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](#) and added a [reCAPTCHA](#), you're ready to turn on Subscriptions.

To enable subscriptions:


1. In **Settings > Subscriptions** in the **Subscription Settings** section, check the box next to "Enable reader subscriptions".

Subscription Settings

i Allow readers to subscribe to categories for email notifications of new and updated articles.


Enable / Disable Enable reader subscriptions

Email Schedule
Emails will send within the selected hour using EST timezone

Email Subject 
{{kbName}} is the name of your knowledge base. {{prettyDate}} is the current

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

At this point, subscriptions are live! Use the [New/Updated callouts](#) to trigger subscriptions to send.

 **Do not enable reader subscriptions until you have, at minimum, configured your SMTP settings.**
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:**

Snippet Name

Merge Code Name **Merge Code Value**

Limited to alphanumeric characters, dashes, and underscores

Snippet Description

This snippet is used to...

Snippet Content WYSIWYG Editor ▾

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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.
