Configure subscriptions

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

Requirements to enable subscriptions

To enable 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 **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. Generate and **add a reCAPTCHA**: This is only necessary when you want to enable subscriptions on a public knowledge base where readers aren't required to log in before viewing content and you're using your own domain rather than a **knowledgeowl.com** subdomain.

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

Configure subscription notification schedule and email subject

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

To do so:

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

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

> **Regardless of the email schedule you select, subscription notification emails will only be sent if there is New or Updated content to notify subscribers about. See 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.

Enable / Disable	☑ Enable reader subscriptions
Email Schedule	Daily ▾ 3pm ▾

Daily
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

d hour using EST timezone

Email Subject   ...tyDate}}

...owledge base. {{prettyDate}} is the current

Save

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.

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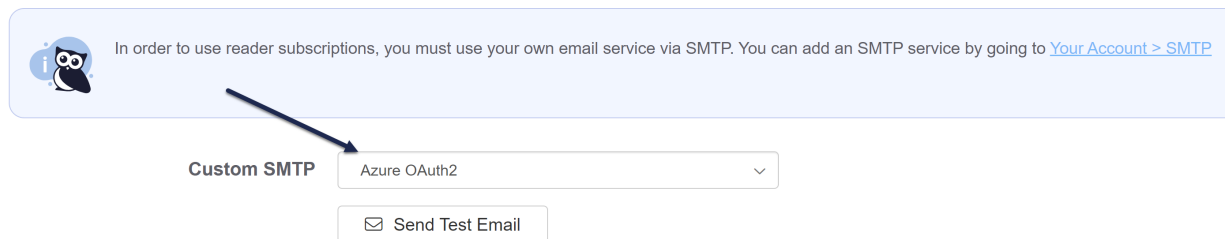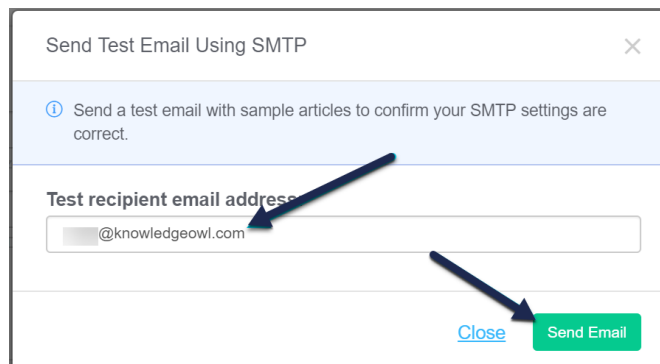
Once you have at least one SMTP service configured in your account:

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

In order to use reader subscriptions, you must use your own email service via SMTP. You can add an SMTP service by going to Your Account > SMTP

Custom SMTP   Azure OAuth2   ⌄

✉ Send Test Email

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.**

Send Test Email Using SMTP   ✕

ⓘ Send a test email with sample articles to confirm your SMTP settings are correct.

Test recipient email address

_____@knowledgeowl.com

Close   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:**

Email sent successfully!   ×

                                                         OK

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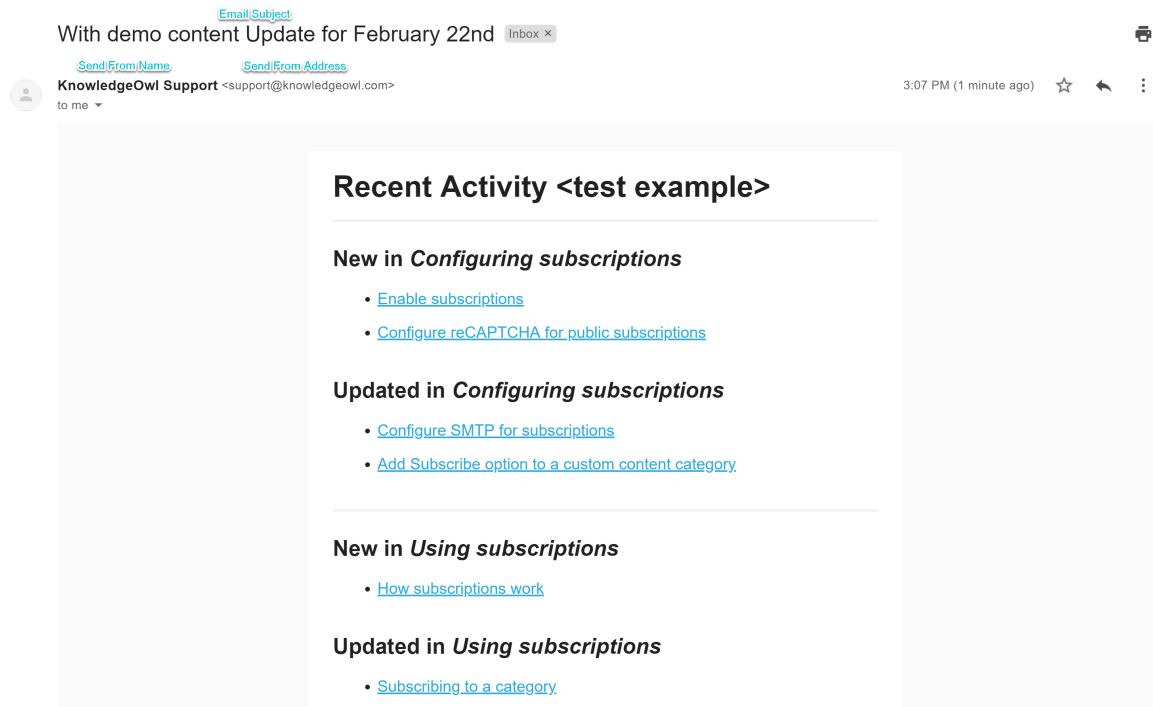
4. **You can Save your changes to come back and finish the setup later, or finish enabling subscriptions now!**

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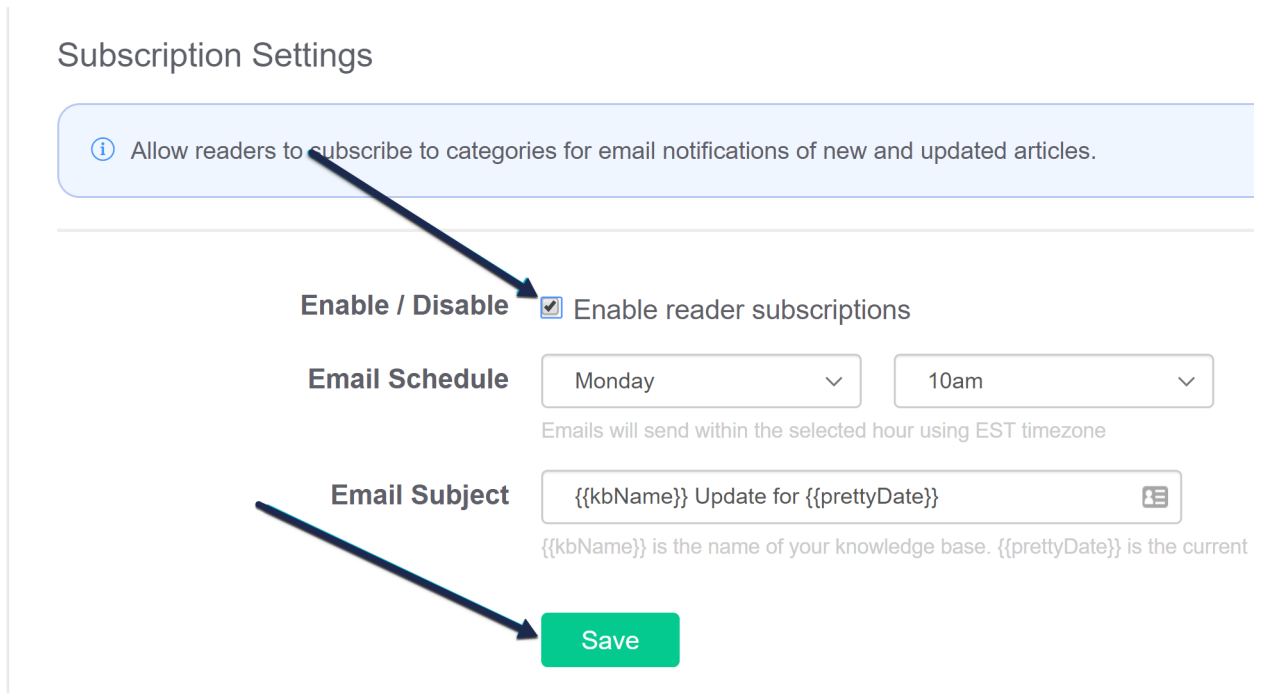
4. Be sure to **Save** your changes.

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

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

Enable / Disable	☑ Enable reader subscriptions
Email Schedule	Monday ⌄ 10am ⌄
	Emails will send within the selected hour using EST timezone
Email Subject	{{kbName}} Update for {{prettyDate}} ⊞
	{{kbName}} is the name of your knowledge base. {{prettyDate}} is the current

Save

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.**

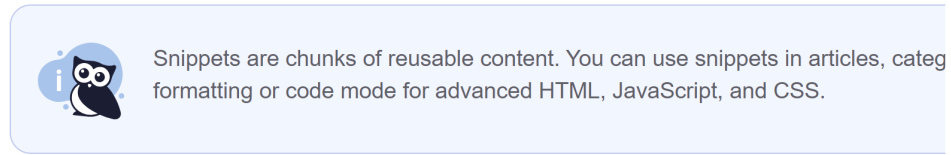# Add Subscribe button to topic and custom content categories

Subscribe buttons are automatically added to most category landing pages. They do not appear by default on topic or custom content categories.

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), you can handle this by **creating a snippet** that will generate the Subscribe button and adding it to the categories manually.

To do so:

1. Go to **Library > Snippets**.

2. Click on the **+ Create New Snippet** button.

Snippets

Snippets are chunks of reusable content. You can use snippets in articles, categ
formatting or code mode for advanced HTML, JavaScript, and CSS.

+ Create New Snippet

Select + Create New Snippet to start

3. Give your snippet 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. Give your snippet a **Description**, 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. Click the dropdown next to **Snippet Content** to select **Code Editor**.

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. Once you're done editing your snippet, be sure to **Create** it.

With your snippet created, you can now add it to the categories you wish:
- For **custom content categories**, you can use the **Insert Snippet** control in the editor bar 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.

Alternatives

If you'd like to play around with where the Subscribe button is positioned, you can see the default behavior by copying this merge code and pasting it into your description of topic categories or the body content of custom content categories: **[template("cat-subscribe")]**

This will create a float-right Subscription button wherever you've placed the template code:

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

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.