

CRM Knowledge Base



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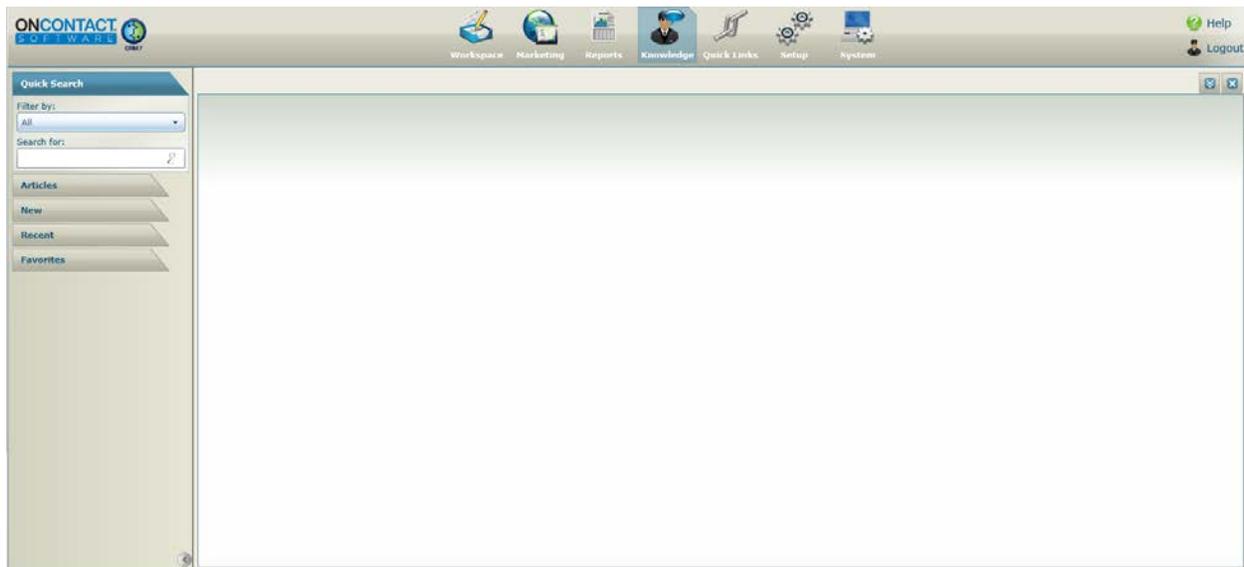
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Overview:

The Knowledge Base allows you to store a library of information which can be searched by keywords. You may store articles with instructions for you Customer Service team to solve problems, manuals for your products, etc. These articles can be grouped by category to make it easier for users to locate a topic of interest.

1. To access the Knowledge Base, click the Knowledge icon. By default, the knowledge screen is empty.

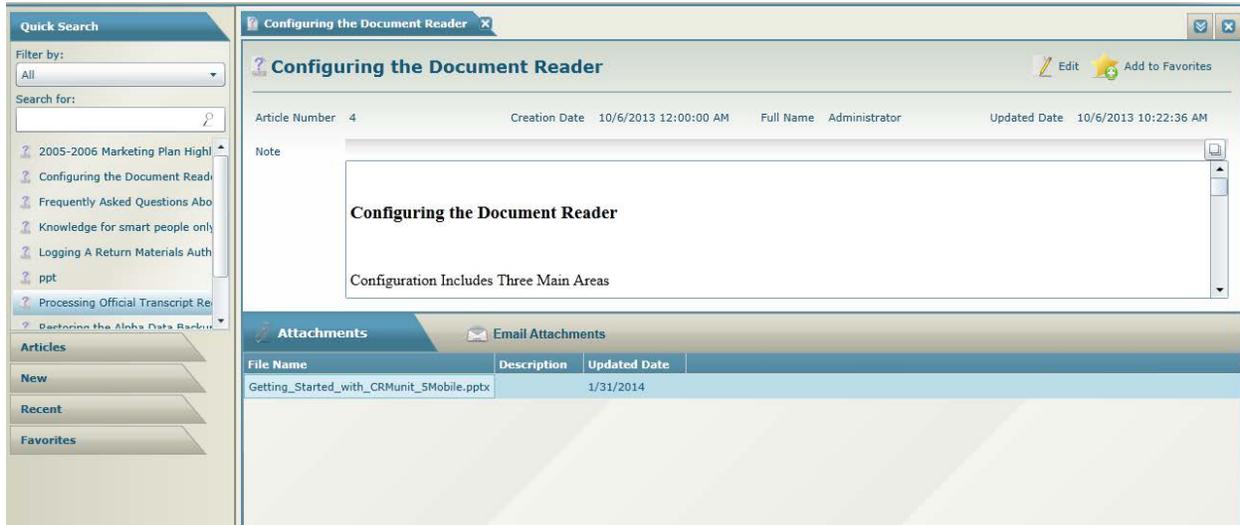


2. The controls at the left allow you to:
 - a. Use Quick search to search the entire library by keyword
 - b. Use saved searches to search for articles using additional search criteria
 - c. Add New Articles to the library
 - d. View articles you Recently opened
 - e. Add articles you often require to your Favorites list

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The Article Record:

An example Article record is shown below. Each is automatically numbered when it is created. The Article Number is shown in the upper left corner, along with its Creation Date, the Author's User Name, and the Date it was last Updated.

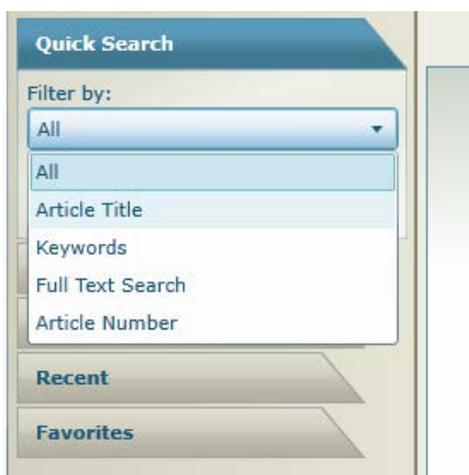


The Notes section is a free-form text field and contains the comments from the author. In this example, they describe the how to Configure the Document Reader – and refer Users to the attached documents listed for reference. Notice that the attached files may be emailed directly from here if desired by selecting one or more attachments and clicking the Email Attachments button.

Searching for Articles

Quick Search

1. Choose how you want to search for the articles:

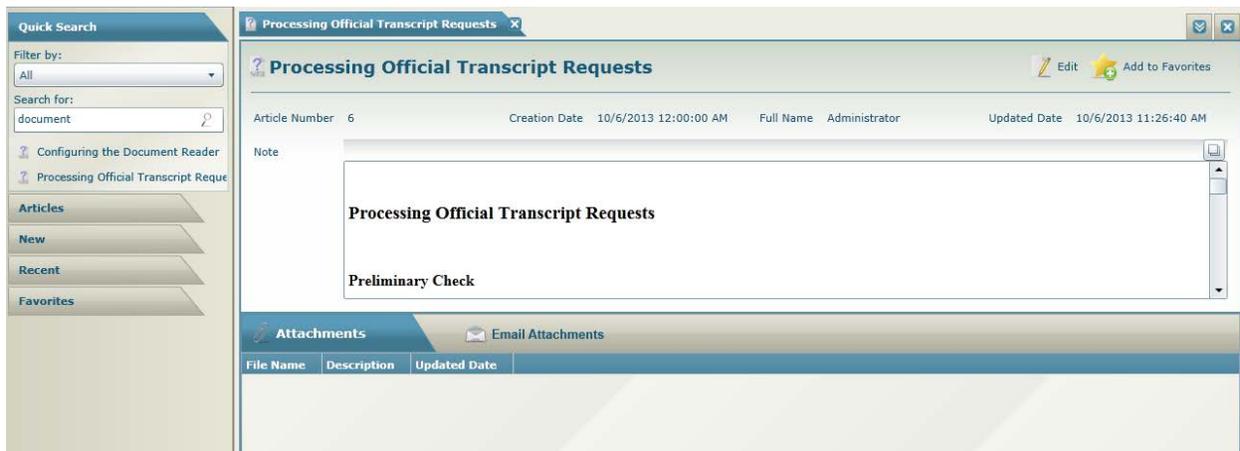


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2. Type in your keyword or article number, etc and Press enter or clicking on the magnifying glass to initiate the search. (Note that you can use the * as a wildcard. EX docu* or *docu*)



3. Click on the article you want to open to display it.

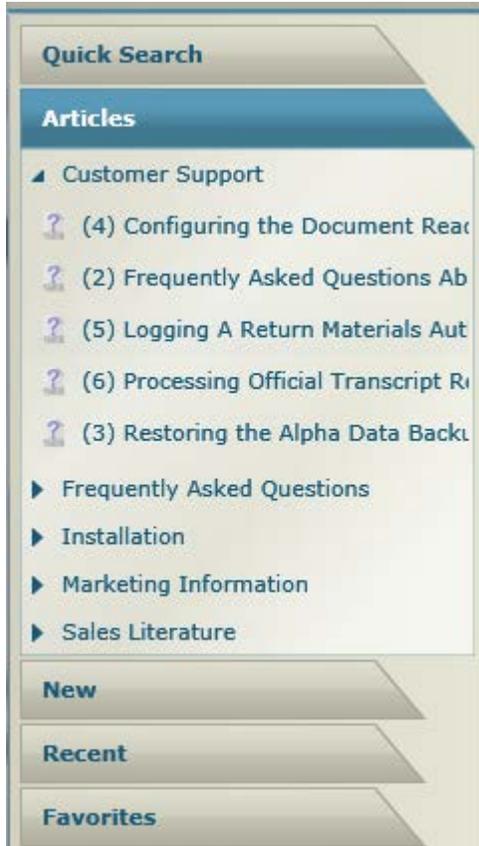


4. Click any attachments to open them.

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Article Groups

1. You can also search for Articles by their assigned groups:



Using Favorites

1. If desired, you can open an Article that you need frequently and click 'Add to Favorites' to add it to your personal favorites list:



2. In the future you can then open the article by clicking on it under the favorites.

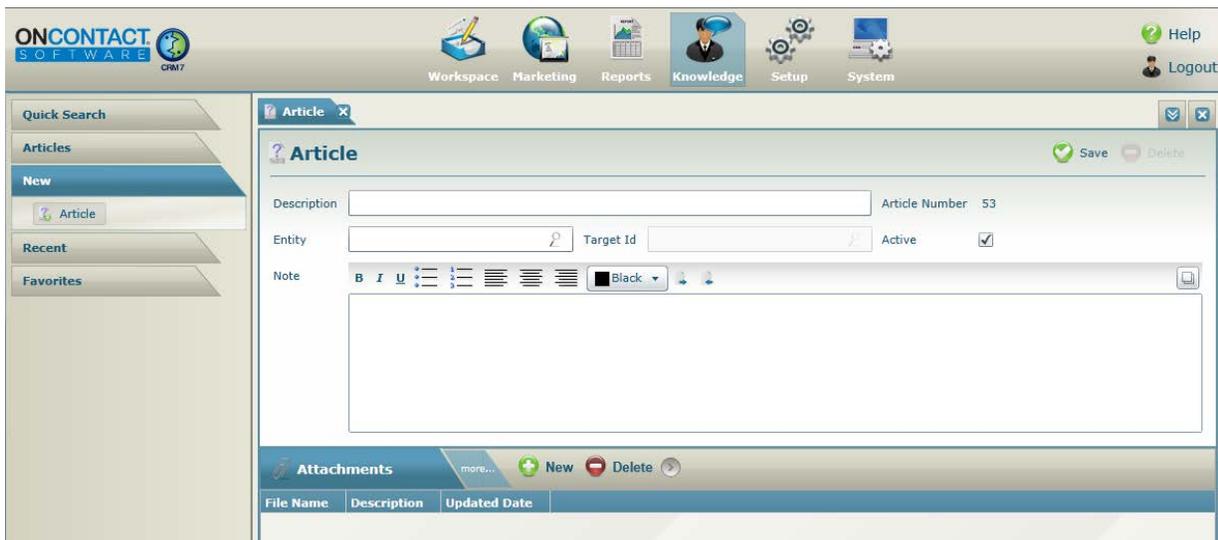
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3. You can also remove an article from favorites by hovering over the name and clicking on the red minus sign.

Adding New Articles

1. In the **Knowledge** tool, **click New**, then **Article**.



Enter an appropriate **Description** for the article. Place the text of the article in the **notes** section of window, or record it separately and use the **Attachments tab** features to link it to the window.

Make the search for a knowledge article more accurate by identifying **Knowledge Base Keywords**. You will be able to search on these words to find a Knowledge Base article.

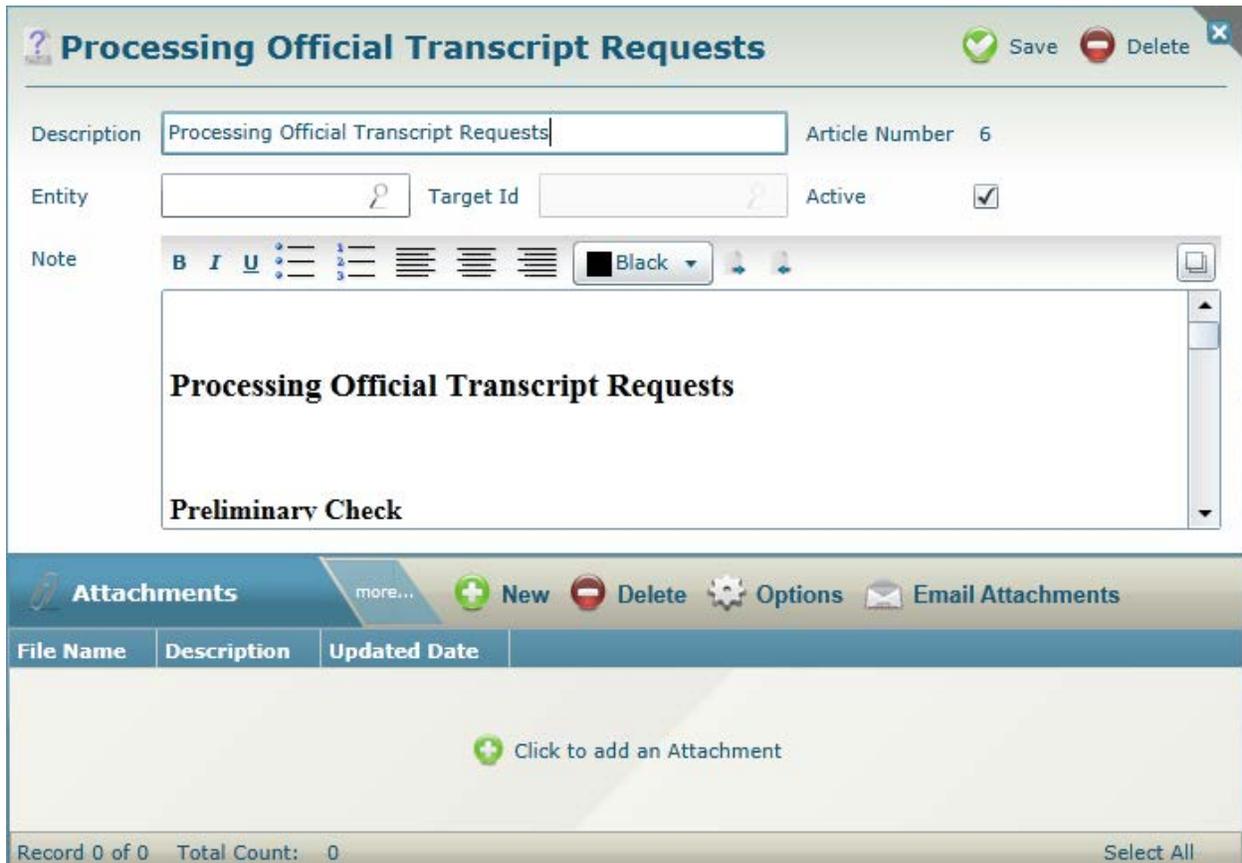
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Search for **Group** to associate the article with. The groups are listed in the **Articles** portion of the **Knowledge** window side toolbar.

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Maintaining Articles

Only people with given privileges will be able to edit. Clicking the Edit button at the top of any Article, zooms to this window:



Processing Official Transcript Requests Save Delete

Description: Processing Official Transcript Requests Article Number: 6

Entity: Target Id: Active:

Note: **Processing Official Transcript Requests**
Preliminary Check

Attachments more... New Delete Options Email Attachments

| File Name | Description | Updated Date |
|----------------------------|-------------|--------------|
| Click to add an Attachment | | |

Record 0 of 0 Total Count: 0 Select All

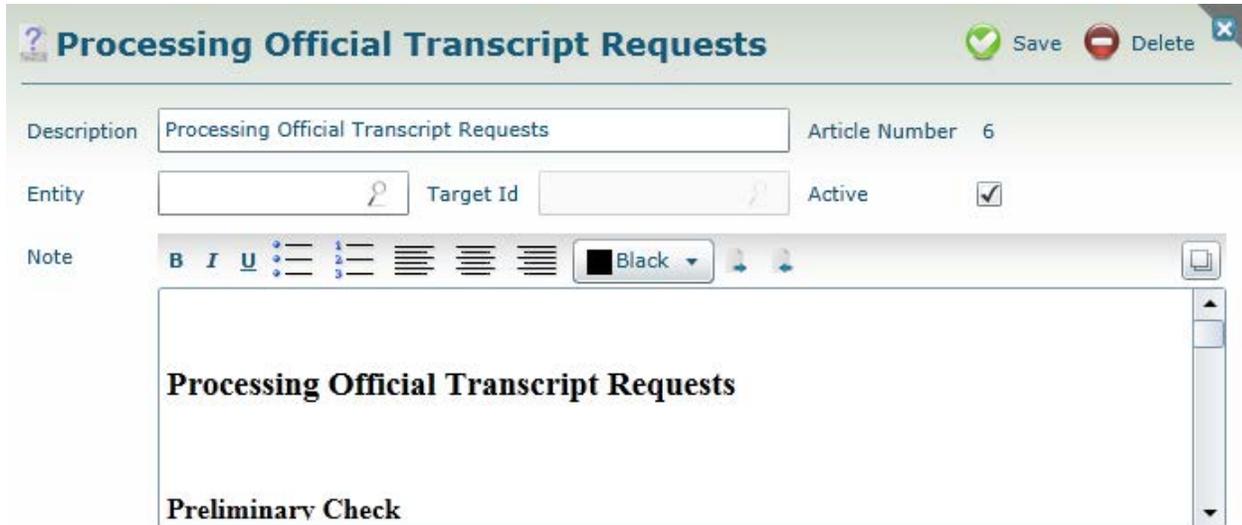
Here you can delete and re-upload documents attached to this KB article.

Notes can be used in any way desired. It has been commonly used for a summary of the article or an area to keep a change log of the documents inside of attachments.

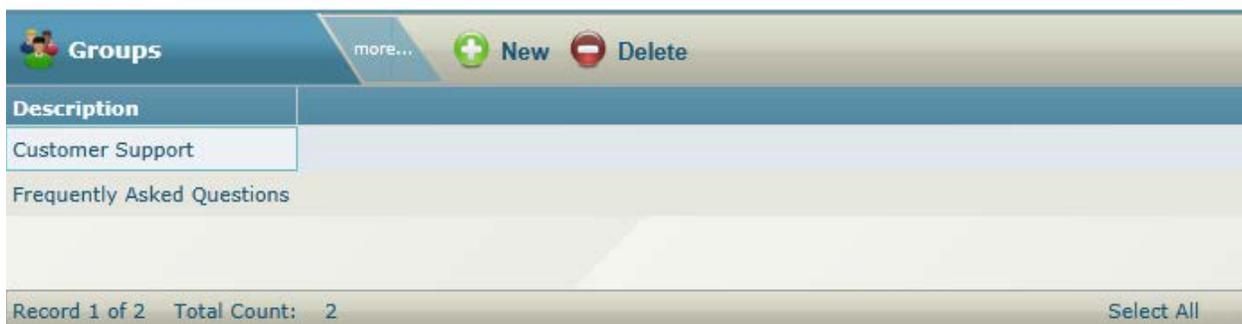
Click **More...** to display additional tabs: Groups and Keywords.

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Groups



The screenshot shows the 'Processing Official Transcript Requests' article editor. At the top, there is a title bar with a question mark icon, the title 'Processing Official Transcript Requests', and 'Save' and 'Delete' buttons. Below the title bar, there are several fields: 'Description' with the value 'Processing Official Transcript Requests', 'Article Number' with the value '6', 'Entity' with a search icon, 'Target Id' with a search icon, and 'Active' with a checked checkbox. Below these fields is a rich text editor with a toolbar containing bold, italic, underline, bulleted list, numbered list, indent, and outdent icons, a color selection dropdown set to 'Black', and a copy icon. The main text area contains the text 'Processing Official Transcript Requests' and 'Preliminary Check'.



The screenshot shows the 'Groups' selection interface. At the top, there is a header with a group icon, the title 'Groups', a 'more...' link, and 'New' and 'Delete' buttons. Below the header is a table with the following content:

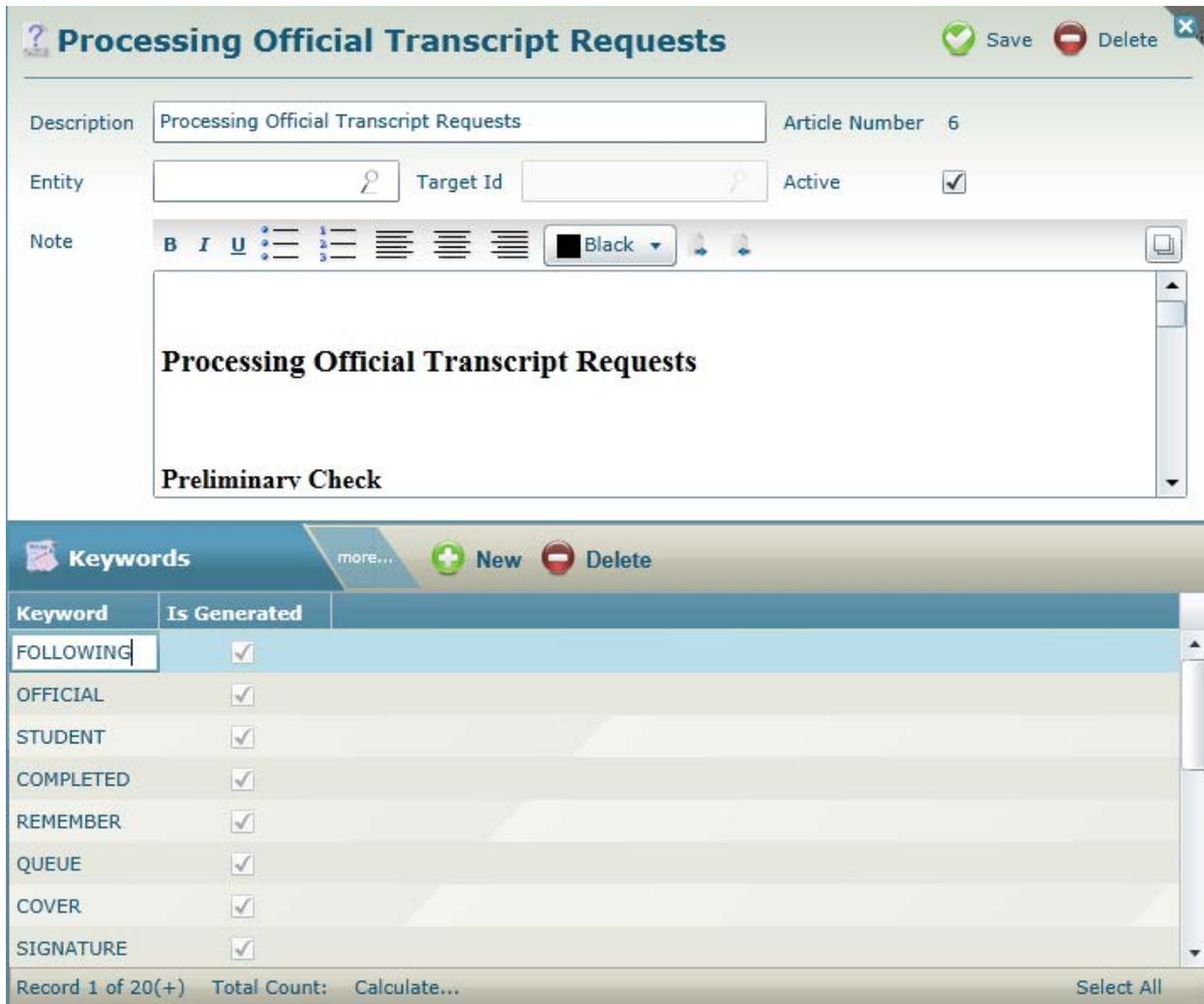
| Description | |
|----------------------------|--|
| Customer Support | |
| Frequently Asked Questions | |

At the bottom of the interface, there is a status bar showing 'Record 1 of 2', 'Total Count: 2', and a 'Select All' button.

Groups lets you decide which categories the article will appear under (listed in the Articles on the left hand pane).

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Keywords



The screenshot displays the CRM Knowledge Base interface. The top section shows the article editor for 'Processing Official Transcript Requests'. The description field contains the text 'Processing Official Transcript Requests'. The article number is 6. The entity and target ID fields are empty. The active checkbox is checked. The note field contains the text 'Processing Official Transcript Requests' and 'Preliminary Check'. The bottom section shows the 'Keywords' table with the following data:

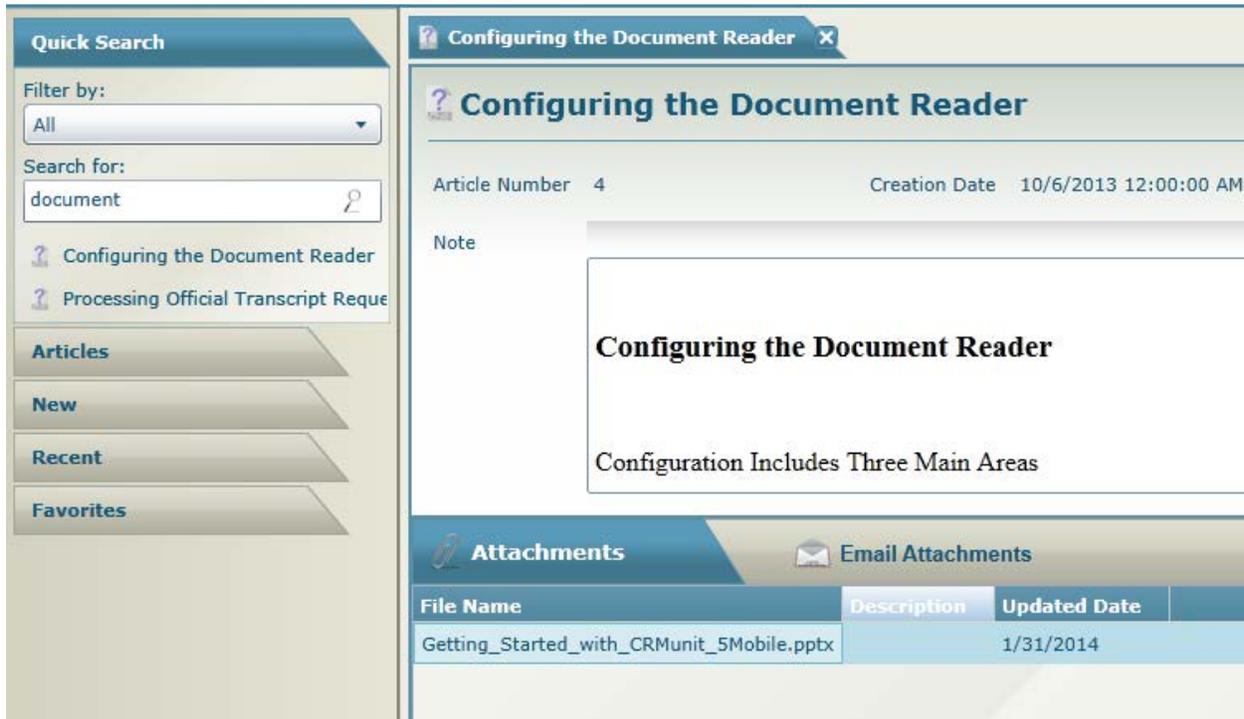
| Keyword | Is Generated |
|-----------|-------------------------------------|
| FOLLOWING | <input checked="" type="checkbox"/> |
| OFFICIAL | <input checked="" type="checkbox"/> |
| STUDENT | <input checked="" type="checkbox"/> |
| COMPLETED | <input checked="" type="checkbox"/> |
| REMEMBER | <input checked="" type="checkbox"/> |
| QUEUE | <input checked="" type="checkbox"/> |
| COVER | <input checked="" type="checkbox"/> |
| SIGNATURE | <input checked="" type="checkbox"/> |

The table footer shows 'Record 1 of 20(+)', 'Total Count: Calculate...', and 'Select All'.

Keywords allows you to add words the user can search on outside of the title. All words in the title are inherently keywords.

Emailing Article Attachments

1. When you have an article open, and want to Email the attachment(s), first select the article(s) from the displayed list. Selected attachments will change to blue.



The screenshot displays the CRM interface for an article titled "Configuring the Document Reader". The article number is 4, and the creation date is 10/6/2013 12:00:00 AM. The article content includes a note with the title "Configuring the Document Reader" and the text "Configuration Includes Three Main Areas". Below the article content, there is a table of attachments. The table has three columns: "File Name", "Description", and "Updated Date". One attachment is listed: "Getting_Started_with_CRMunit_5Mobile.pptx" with an updated date of 1/31/2014. The "Email Attachments" button is highlighted in blue.

| File Name | Description | Updated Date |
|---|-------------|--------------|
| Getting_Started_with_CRMunit_5Mobile.pptx | | 1/31/2014 |

2. Click the Email Attachments button to launch an Email window which includes you selected attachments:

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