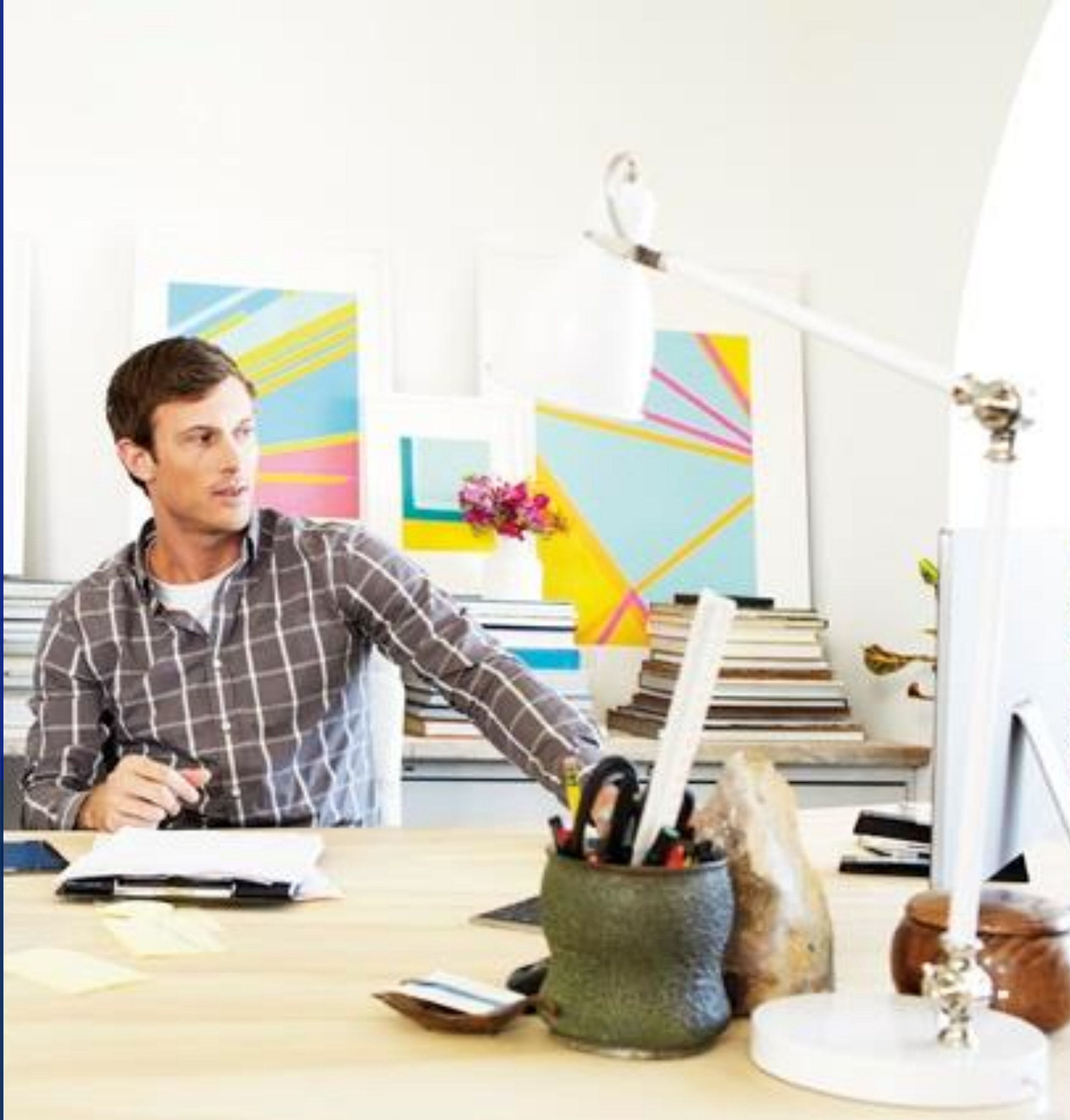
Use knowledge base articles to help your customers

Make information for common questions and issues available to everyone by capturing it in a KB article.

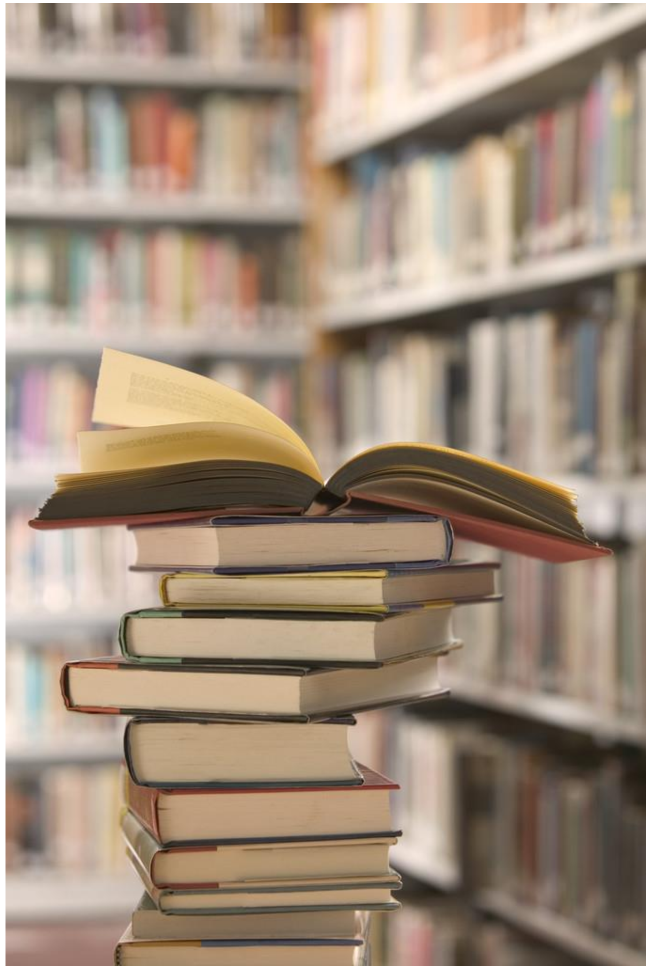
Microsoft Dynamics CRM



make your service team more efficient

Create a repository of KB articles that your customer service team can use when they're working with customers to help answer questions about your product or service.

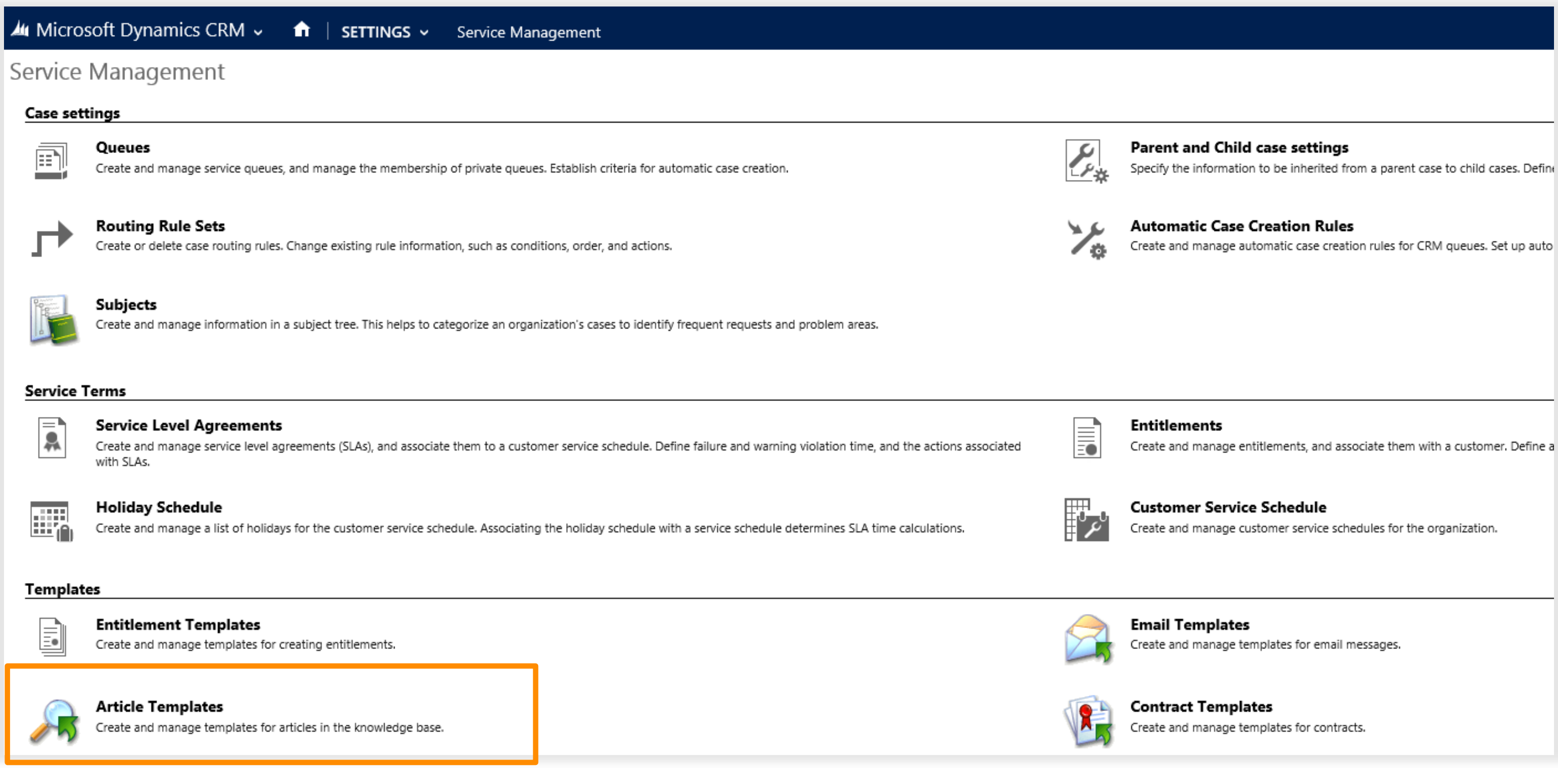
A key benefit of a well-organized knowledge base is that it makes your service team more efficient and helps improve customer satisfaction.



make it easy to create an article

Before your team can create and share KB articles, you'll need to set-up a few Article templates. You can make the templates for common how-to questions and problems and their solutions—so that your team can use those templates to help guide them when they write KB articles.

Go to > **Microsoft Dynamics CRM** > **Settings** > **Service Management** > **Article Templates**

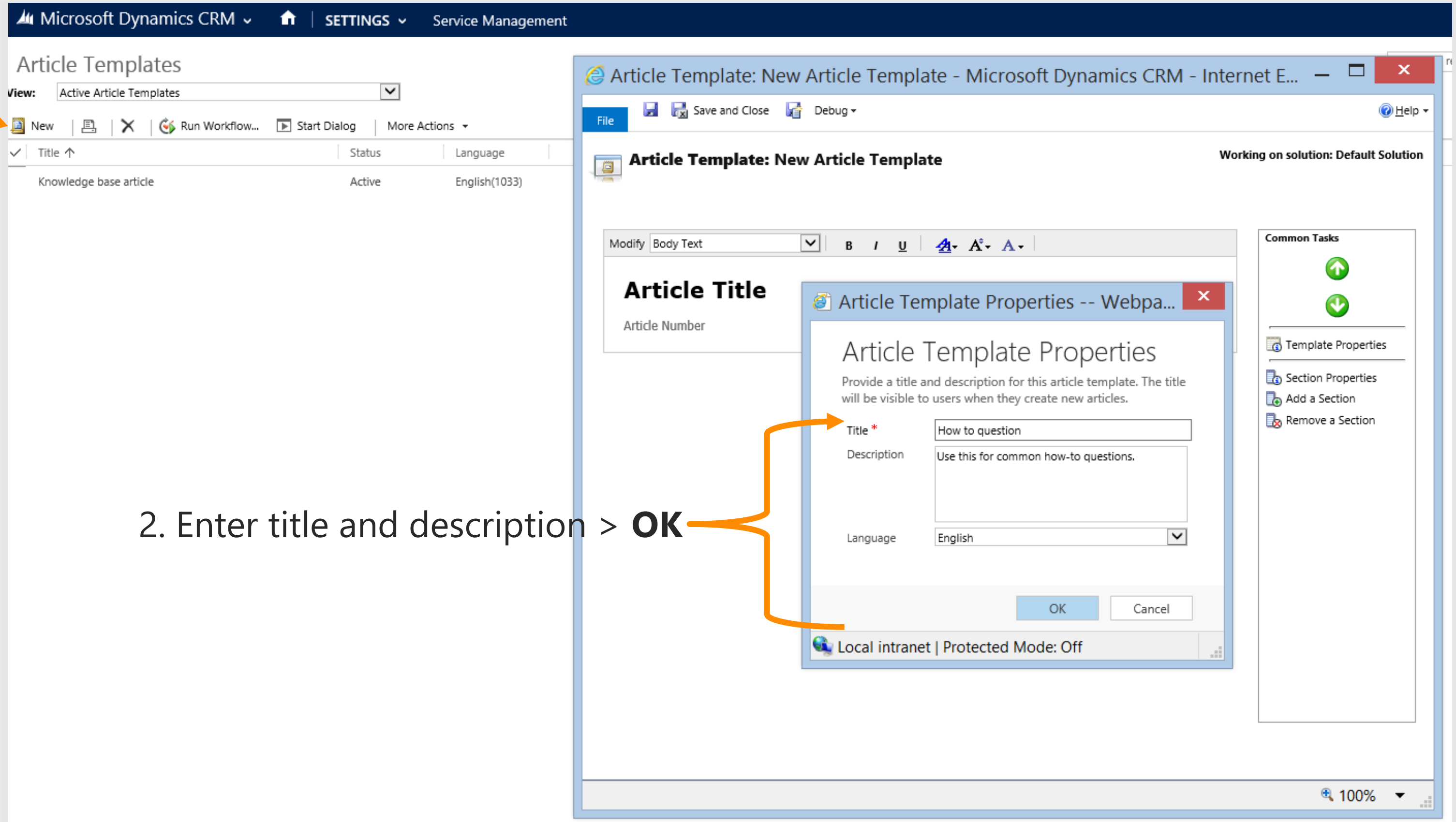


Important Before you get started, make sure that you have the right permissions to create templates.

use templates

1. Click or tap, **New**

2. Enter title and description > **OK**



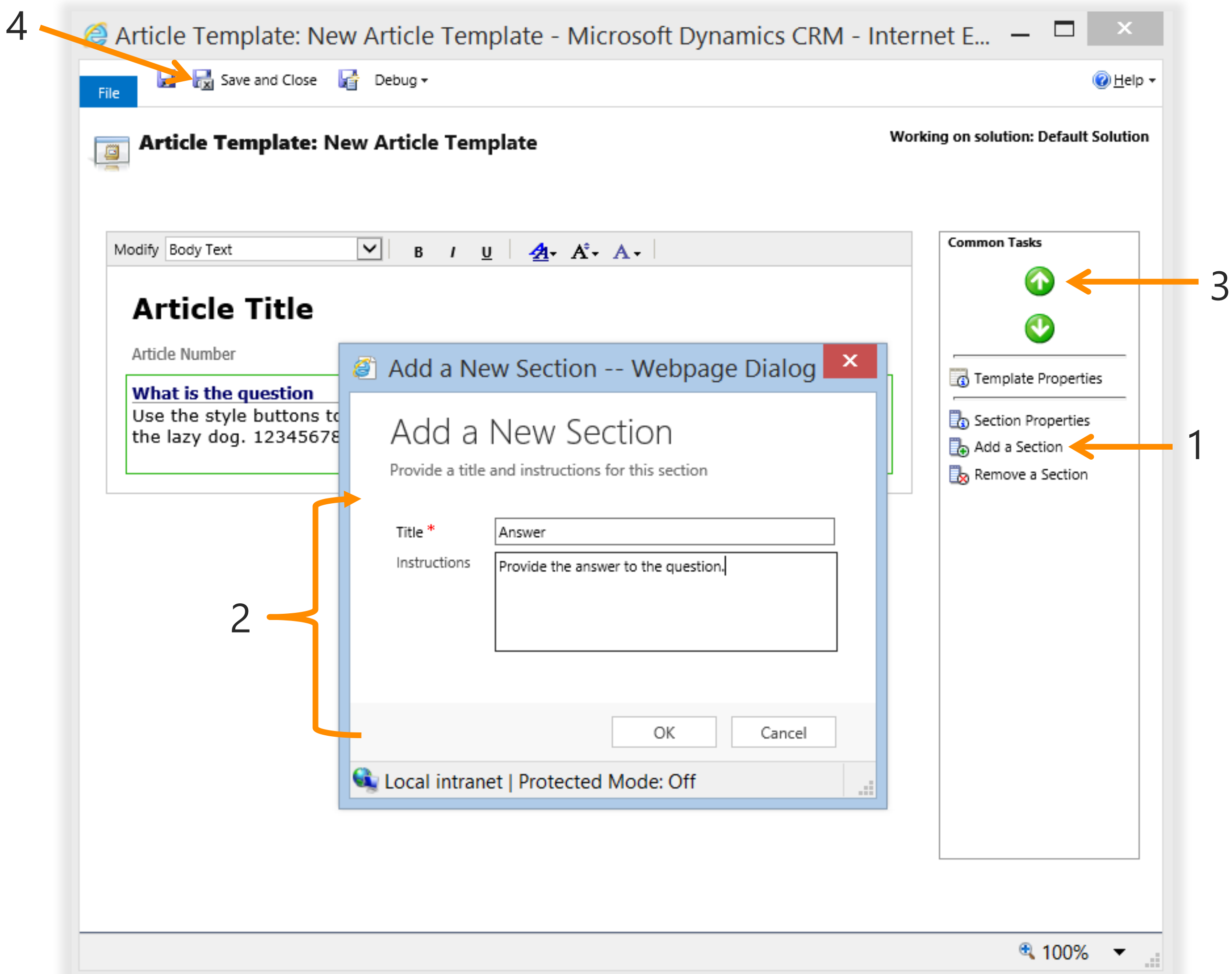
...continued

1. Click or tap to add a section to the template.

2. Enter the title and instruction and then click or tap, **OK**.

3. Use the arrow to move the sections up or down.

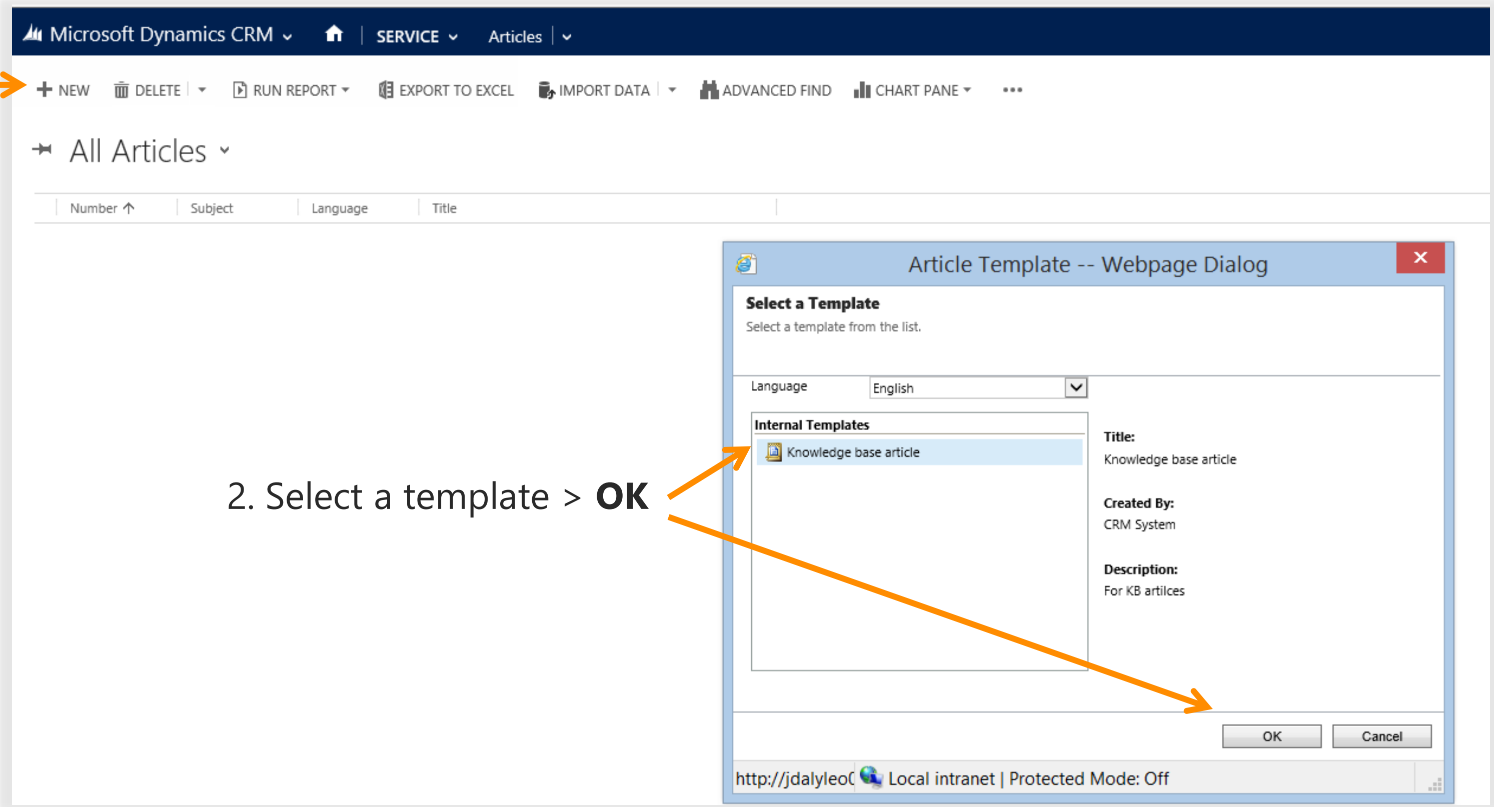
4. When you're done, click or tap **Save and Close**.



now, start creating KB articles

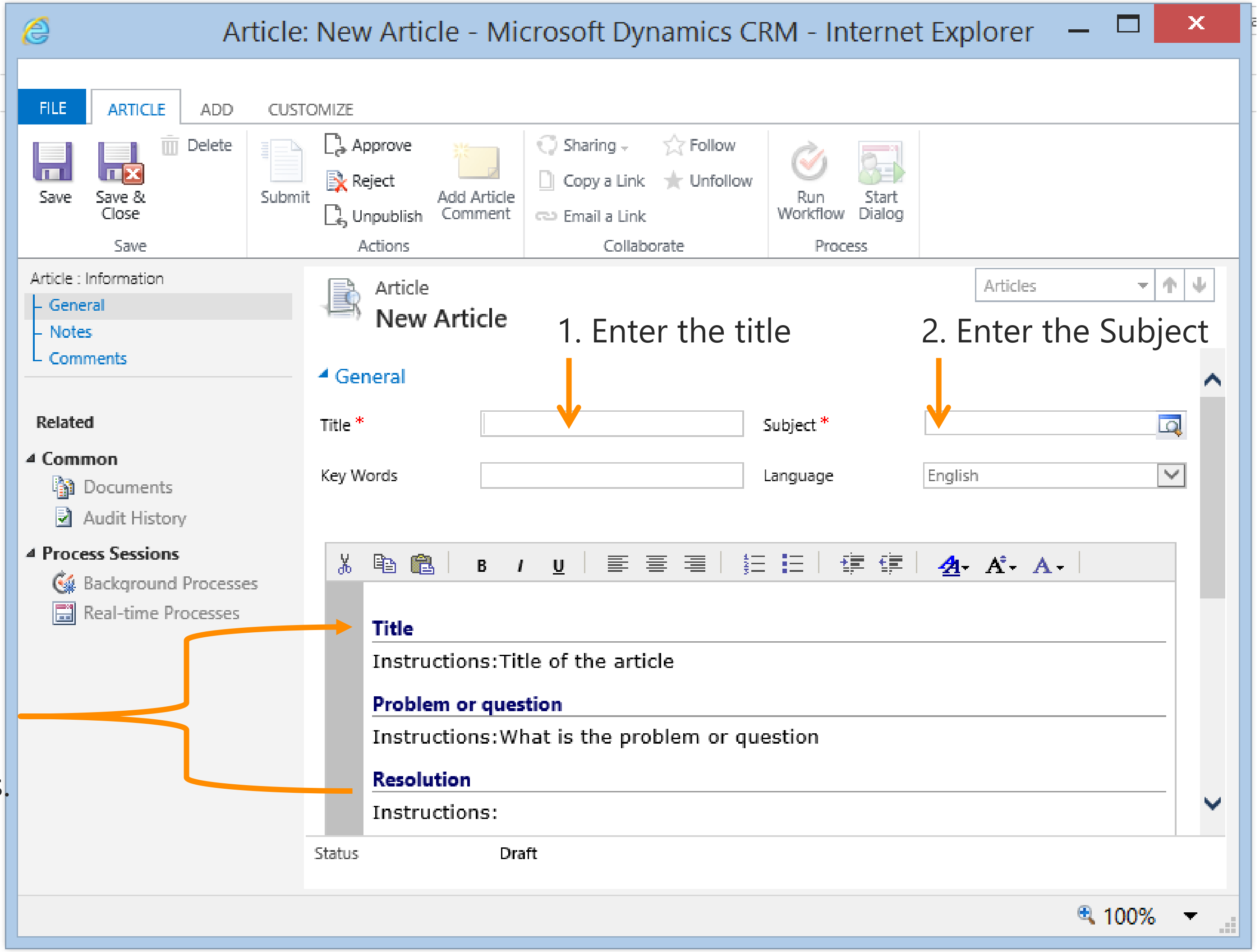
Go to > **Microsoft Dynamics CRM** > **Service** > **Article**

1. Click or tap **New**



2. Select a template > **OK**

the template will guide you…

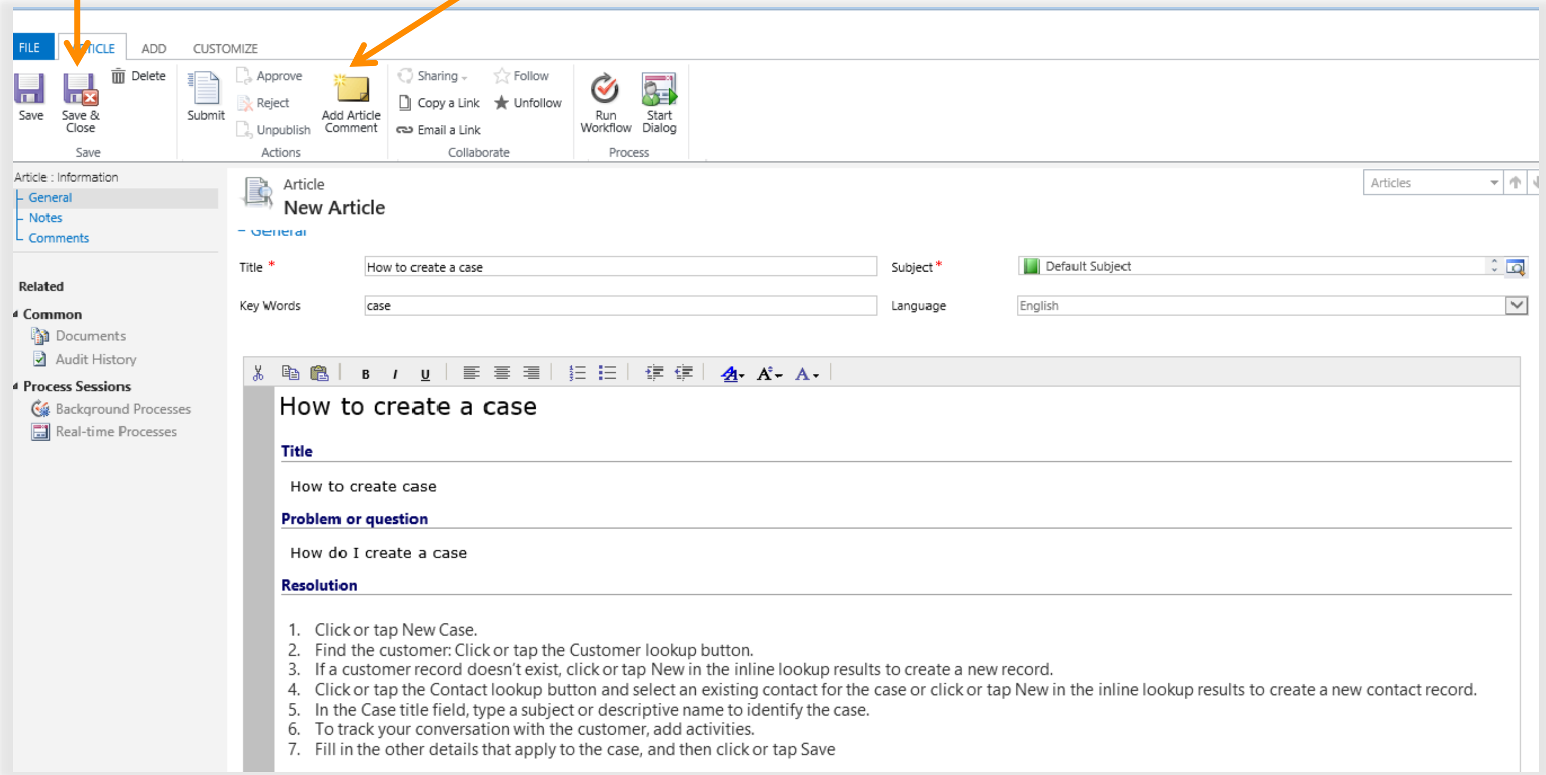


3. Use the instructions in the template to fill out the article sections.

done – save the KB article

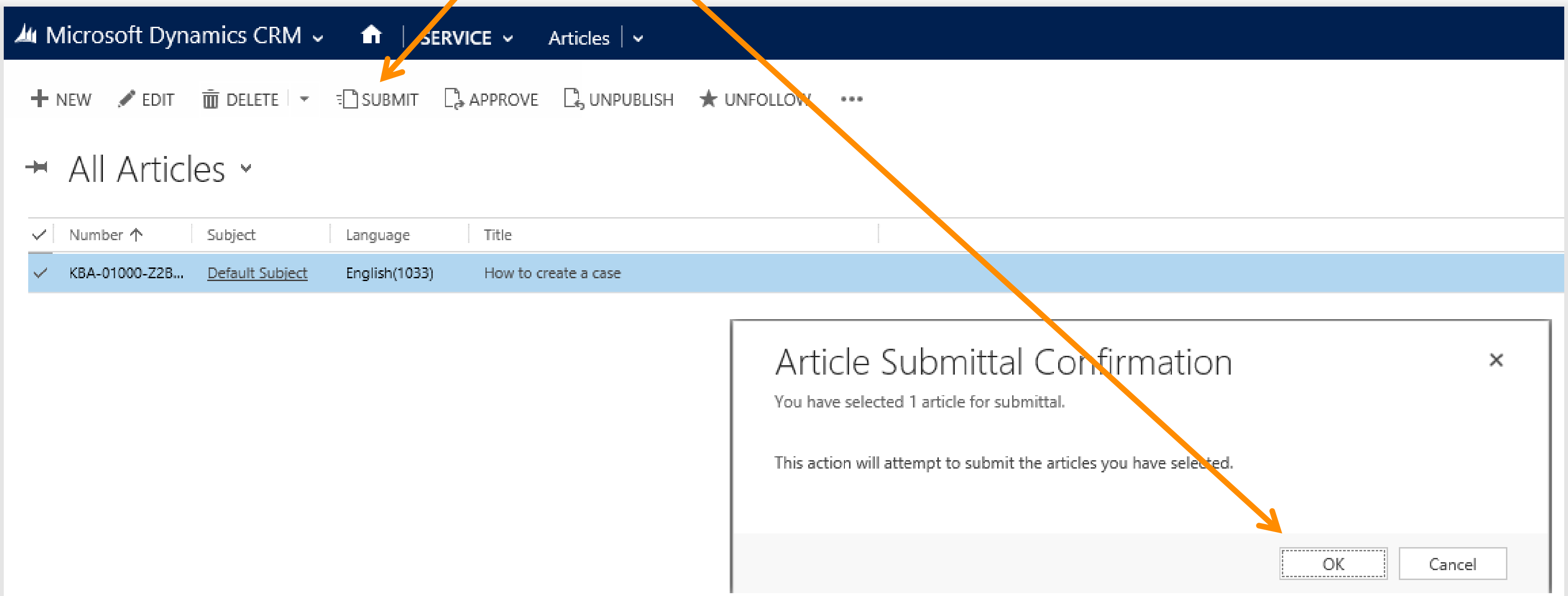
1. Click or tap **Save and close**

Tip: When you're reviewing an article you can add comments.



submit it – and get it published

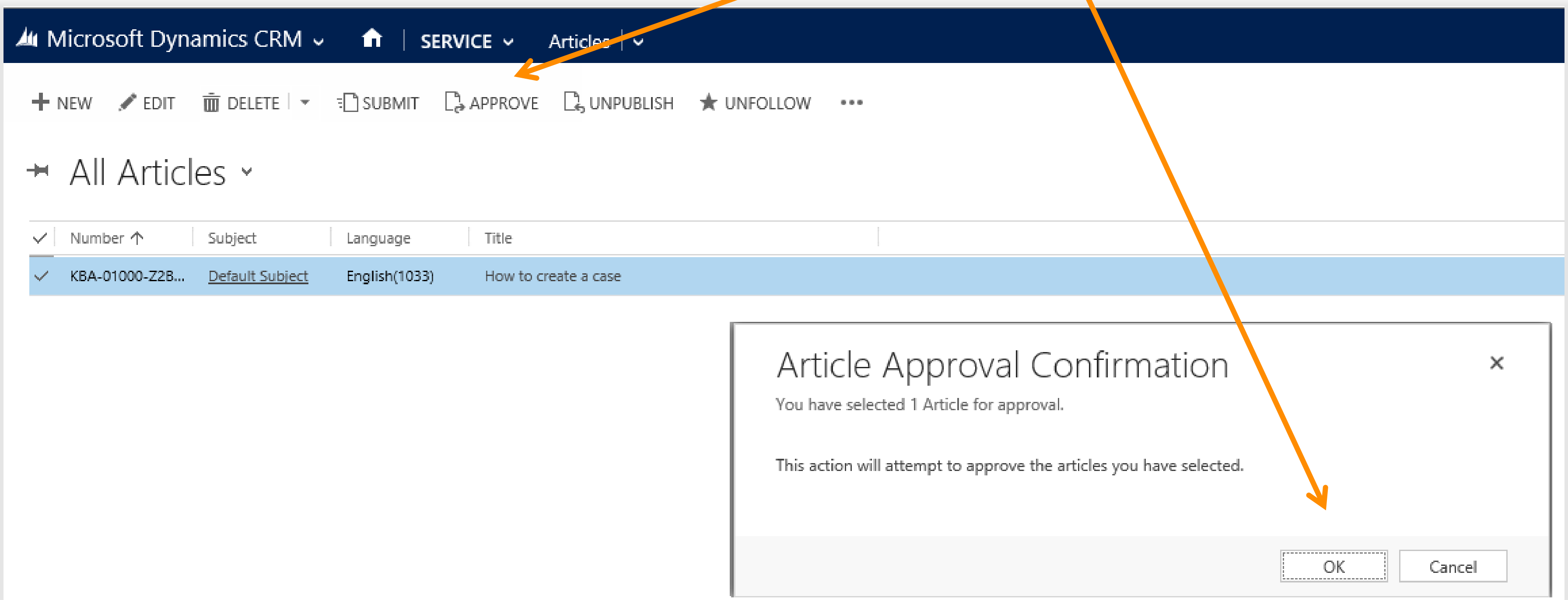
Click or tap **Submit** > **OK**



review and publish

When a KB article is submitted for publishing, the person on your team who's responsible for KB articles can review the article and publish it. When they approve the article, it's live and ready for use within 15 minutes.

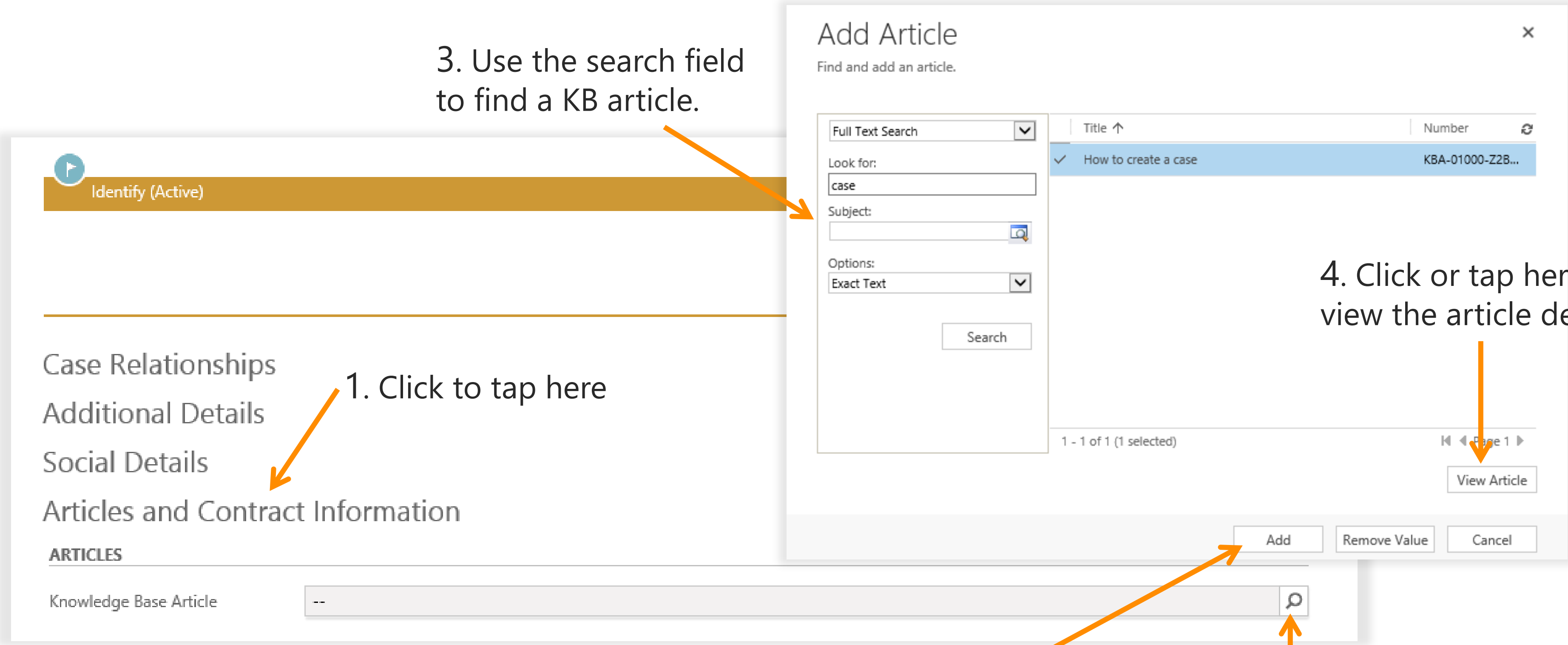
Go to > **Microsoft Dynamics CRM** > **Service** > **Article** > **Approve** > **OK**



take advantage of your knowledge base

When you're working with a customer, use the search, to find KB articles that can help you resolve the customer issue quickly.

From a case form click or tap > **Articles and Contact information > Lookup.**



1. Click to tap here

2. Click to tap to the **Lookup** icon.

3. Use the search field to find a KB article.

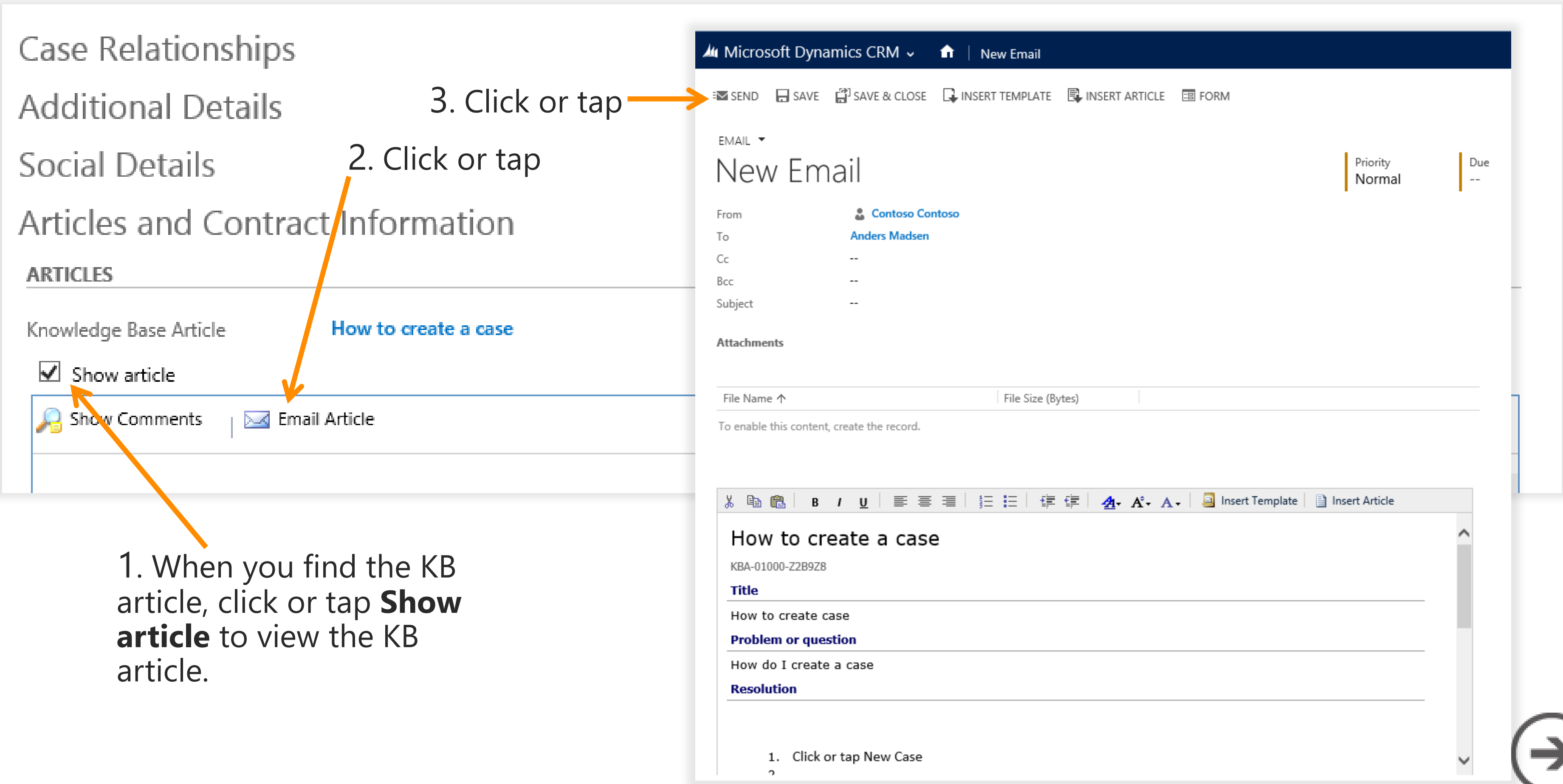
4. Click or tap here to view the article details.

5. If this is the article you're looking for - add it to the case you're working on.

send information quickly

If you're working on an email case or you're on the phone with the customer, it's easy to send them the a KB article to the customer.

When you find the KB article click or tap > **Email Article** > **Send**.



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Customer Center

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