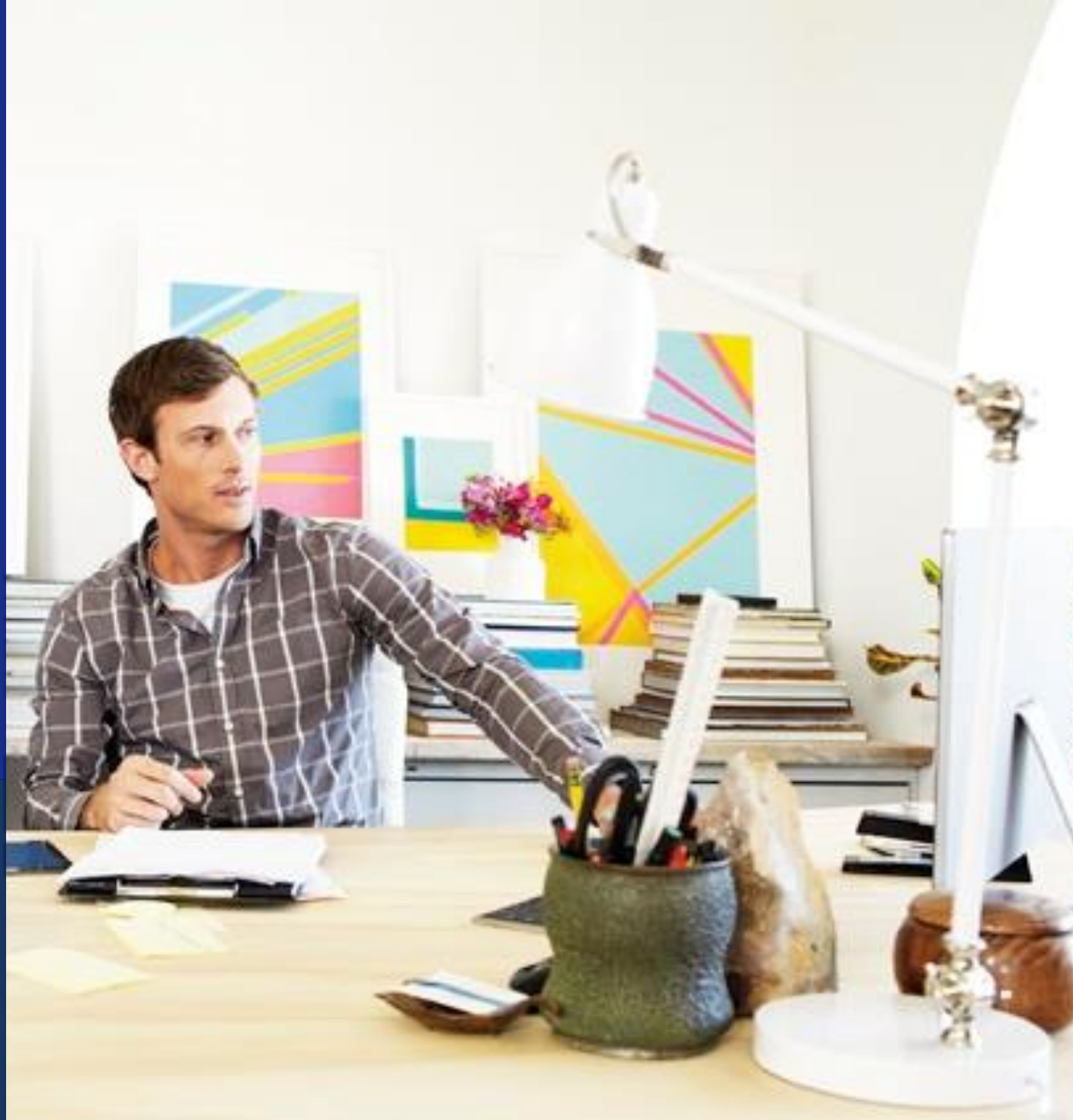


Use knowledge base articles to help your customers

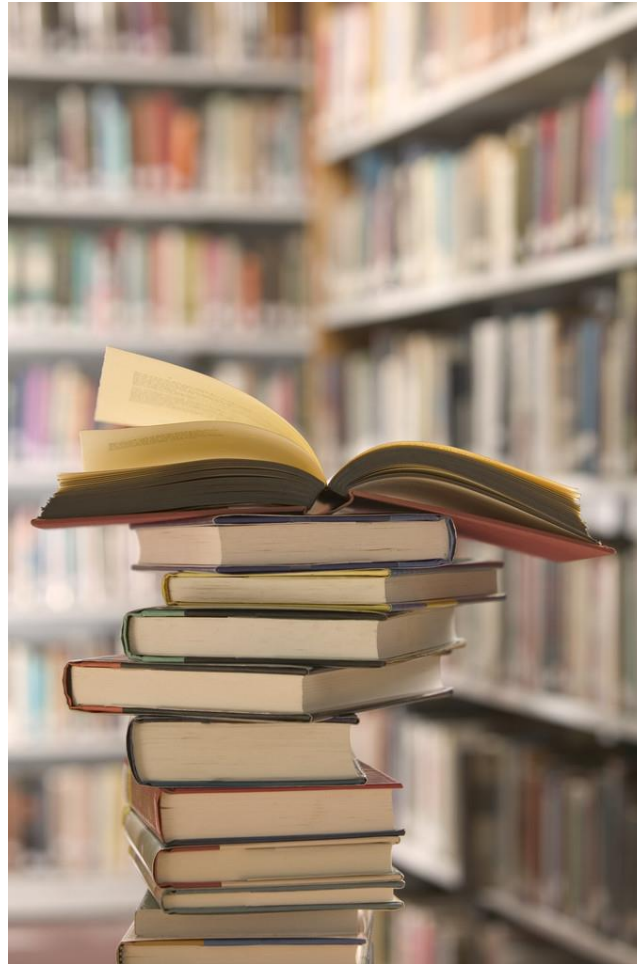
Make information for common questions and issues available to everyone by capturing it in a KB article.



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.

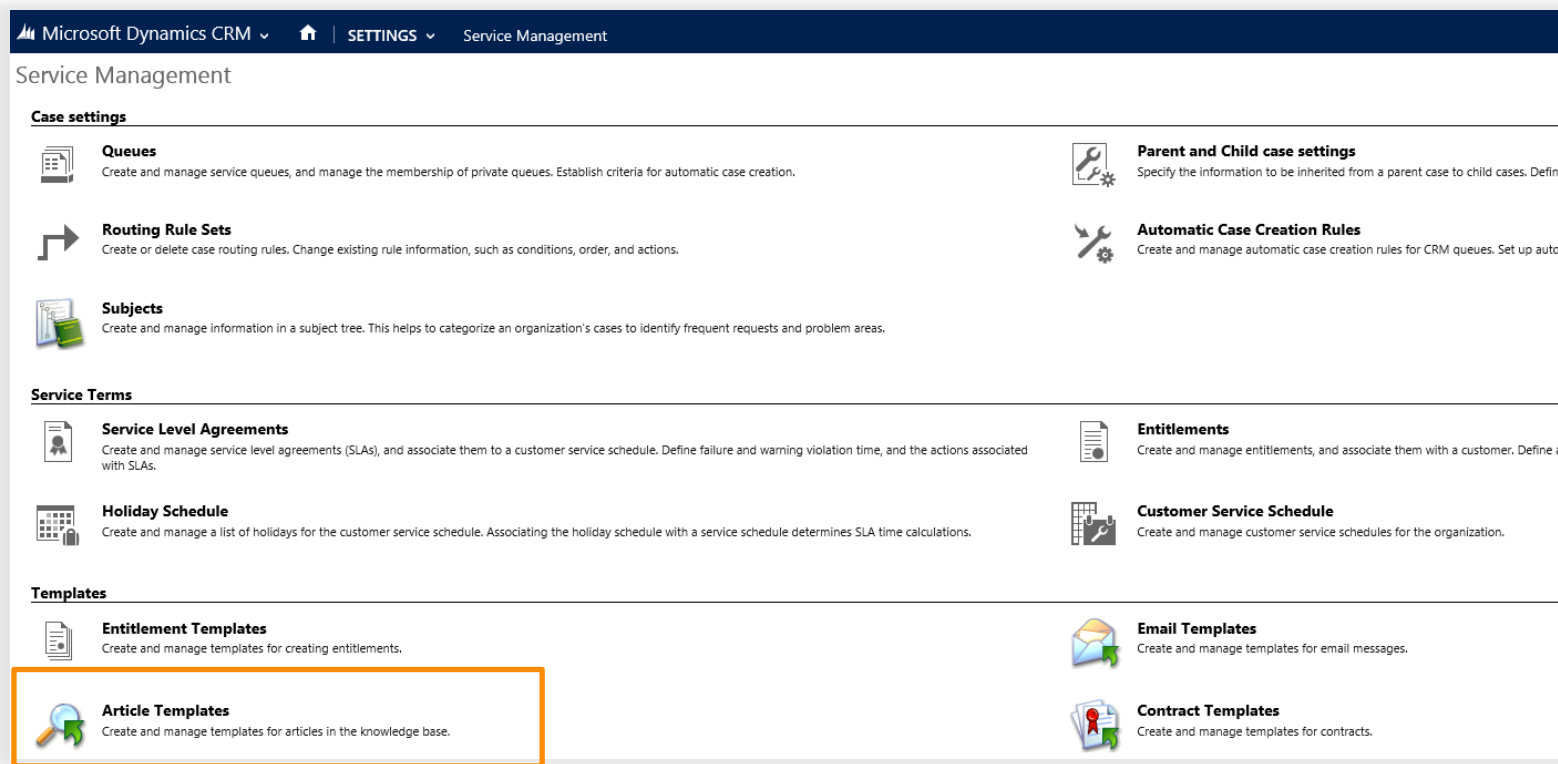
A key benefit of a well-organized knowledge base is that it makes your service team more efficient and helps improve customer satisfaction.



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**



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', a home icon, 'SETTINGS', and 'Service Management'. The main content area is titled 'Service Management' and is divided into several sections:

- Case settings**
 - Queues**: Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic case creation.
 - Routing Rule Sets**: Create or delete case routing rules. Change existing rule information, such as conditions, order, and actions.
 - Subjects**: Create and manage information in a subject tree. This helps to categorize an organization's cases to identify frequent requests and problem areas.
 - Parent and Child case settings**: Specify the information to be inherited from a parent case to child cases. Define...
 - Automatic Case Creation Rules**: Create and manage automatic case creation rules for CRM queues. Set up auto...
- Service Terms**
 - Service Level Agreements**: Create and manage service level agreements (SLAs), and associate them to a customer service schedule. Define failure and warning violation time, and the actions associated with SLAs.
 - Holiday Schedule**: Create and manage a list of holidays for the customer service schedule. Associating the holiday schedule with a service schedule determines SLA time calculations.
 - Entitlements**: Create and manage entitlements, and associate them with a customer. Define a...
 - Customer Service Schedule**: Create and manage customer service schedules for the organization.
- Templates**
 - Entitlement Templates**: Create and manage templates for creating entitlements.
 - Article Templates**: Create and manage templates for articles in the knowledge base. (This item is highlighted with an orange border in the original image.)
 - Email Templates**: Create and manage templates for email messages.
 - Contract Templates**: Create and manage templates for contracts.

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



use templates

1. Click or tap, **New**



The screenshot displays the Microsoft Dynamics CRM interface. On the left, the 'Article Templates' list is visible, showing a table with columns for Title, Status, and Language. The 'New' button is highlighted with an orange arrow. On the right, the 'Article Template: New Article Template' window is open, showing a rich text editor for the article body. A dialog box titled 'Article Template Properties' is overlaid on the editor, containing fields for Title, Description, and Language. The 'Title' field contains 'How to question', the 'Description' field contains 'Use this for common how-to questions.', and the 'Language' dropdown is set to 'English'. The dialog box has 'OK' and 'Cancel' buttons at the bottom. An orange arrow points from the text '2. Enter title and description > OK' to the 'OK' button in the dialog box.

Title	Status	Language
Knowledge base article	Active	English(1033)

Article Template Properties

Provide a title and description for this article template. The title will be visible to users when they create new articles.

Title *

Description

Language

OK Cancel

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



...continued

The screenshot shows the 'Article Template: New Article Template' interface in Microsoft Dynamics CRM. The main window has a menu bar with 'File', 'Save and Close', and 'Debug'. The main content area shows a text editor with 'Article Title' and 'Article Number' fields. A 'Common Tasks' pane on the right contains 'Add a Section' and 'Remove a Section' buttons. An 'Add a New Section -- Webpage Dialog' is open, showing a form with 'Title' and 'Instructions' fields. The dialog box has 'OK' and 'Cancel' buttons. The status bar at the bottom indicates 'Local intranet | Protected Mode: Off'.

4

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...

The screenshot shows the 'New Article' form in Microsoft Dynamics CRM. The form is titled 'Article: New Article - Microsoft Dynamics CRM - Internet Explorer'. The ribbon includes 'FILE', 'ARTICLE', 'ADD', and 'CUSTOMIZE' tabs. The 'ARTICLE' ribbon has groups for 'Save', 'Actions', 'Collaborate', and 'Process'. The 'General' section contains fields for 'Title *', 'Subject *', 'Key Words', and 'Language' (set to 'English'). Below these fields is a rich text editor with a toolbar. The rich text editor contains a template with three sections: 'Title' with instructions 'Title of the article', 'Problem or question' with instructions 'What is the problem or question', and 'Resolution' with instructions. The status bar at the bottom shows 'Status: Draft'. Annotations include orange arrows pointing to the 'Title' and 'Subject' fields with the text '1. Enter the title' and '2. Enter the Subject', and a bracket pointing to the rich text editor with the text '3. Use the instructions in the template to fill out the article sections.'

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.

The screenshot shows a web-based interface for creating a new Knowledge Base (KB) article. The top navigation bar includes 'FILE', 'ARTICLE', 'ADD', and 'CUSTOMIZE'. Below this is a toolbar with various actions: 'Save', 'Save & Close', 'Delete', 'Submit', 'Approve', 'Reject', 'Unpublish', 'Add Article Comment', 'Sharing', 'Copy a Link', 'Email a Link', 'Follow', 'Unfollow', 'Run Workflow', and 'Start Dialog'. An orange arrow points from the text '1. Click or tap Save and close' to the 'Save & Close' button. Another orange arrow points from the text 'Tip: When you're reviewing an article you can add comments.' to the 'Add Article Comment' button. The main content area is titled 'New Article' and contains a form with fields for 'Title *' (filled with 'How to create a case'), 'Subject *' (set to 'Default Subject'), 'Key Words' (filled with 'case'), and 'Language' (set to 'English'). Below the form is a rich text editor with a toolbar and the following content: 'How to create a case', 'Title', 'How to create case', 'Problem or question', 'How do I create a case', 'Resolution', and a numbered list of 7 steps for creating a case.



submit it – and get it published

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

The screenshot displays the Microsoft Dynamics CRM interface. At the top, the navigation bar shows 'Microsoft Dynamics CRM', a home icon, 'SERVICE', and 'Articles'. Below this, a command bar contains '+ NEW', 'EDIT', 'DELETE', 'SUBMIT', 'APPROVE', 'UNPUBLISH', and 'UNFOLLOW'. The main area shows a table of articles with columns for 'Number', 'Subject', 'Language', and 'Title'. One article is selected, with 'KBA-01000-Z28...' in the 'Number' column and 'How to create a case' in the 'Title' column. An 'Article Submittal Confirmation' dialog box is open in the foreground, containing the text: 'You have selected 1 article for submittal.' and 'This action will attempt to submit the articles you have selected.' The dialog box has 'OK' and 'Cancel' buttons at the bottom right. Two orange arrows point from the text 'Click or tap Submit > OK' to the 'SUBMIT' button and the 'OK' button in the dialog box.

Number	Subject	Language	Title
✓ KBA-01000-Z28...	Default Subject	English(1033)	How to create a case

Article Submittal Confirmation

You have selected 1 article for submittal.

This action will attempt to submit the articles you have selected.

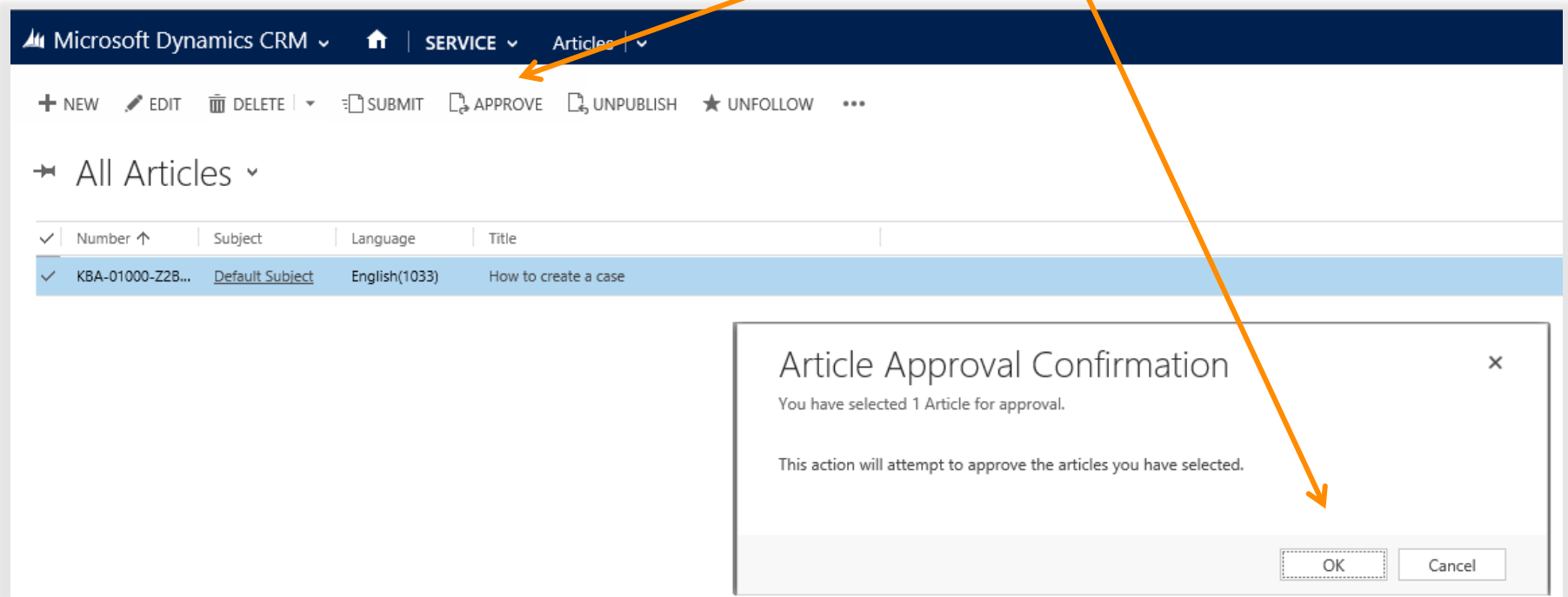
OK Cancel



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**



The screenshot shows the Microsoft Dynamics CRM interface. The top navigation bar includes 'Microsoft Dynamics CRM', a home icon, 'SERVICE', and 'Articles'. Below the navigation bar is a ribbon with buttons for '+ NEW', 'EDIT', 'DELETE', 'SUBMIT', 'APPROVE', 'UNPUBLISH', and 'UNFOLLOW'. The 'APPROVE' button is highlighted with an orange arrow. Below the ribbon is a table of articles. The first row is selected and highlighted in blue. The table has columns for 'Number', 'Subject', 'Language', and 'Title'. The selected row contains the following data:

Number	Subject	Language	Title
KBA-01000-Z2B...	Default Subject	English(1033)	How to create a case

Below the table is a dialog box titled 'Article Approval Confirmation'. The dialog box contains the following text:

Article Approval Confirmation

You have selected 1 Article for approval.

This action will attempt to approve the articles you have selected.

At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'. An orange arrow points from the 'OK' button in the dialog box to the 'OK' text in the navigation path above.



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 Contract information** > **Lookup**.

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

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

1. Click to tap here

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

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

The image shows a mobile application interface. On the left is a case form with a navigation menu. The menu items are: 'Identify (Active)', 'Case Relationships', 'Additional Details', 'Social Details', and 'Articles and Contract Information'. Below the menu is a section titled 'ARTICLES' with a search bar containing '--' and a magnifying glass icon. On the right is an 'Add Article' dialog box. The dialog has a title 'Add Article' and a subtitle 'Find and add an article.'. It contains a 'Full Text Search' dropdown, a 'Look for:' text field with 'case' entered, a 'Subject:' text field with a magnifying glass icon, and an 'Options:' dropdown set to 'Exact Text'. A 'Search' button is at the bottom of the search section. On the right side of the dialog, there is a table with columns 'Title' and 'Number'. The table contains one row: 'How to create a case' with the number 'KBA-01000-Z2B...'. Below the table, it says '1 - 1 of 1 (1 selected)'. At the bottom right of the dialog, there is a 'View Article' button. At the bottom of the dialog, there are three buttons: 'Add', 'Remove Value', and 'Cancel'. Orange arrows point from the text instructions to the corresponding UI elements: arrow 1 points to 'Articles and Contract Information', arrow 2 points to the magnifying glass icon in the case form, arrow 3 points to the search field in the dialog, arrow 4 points to the 'View Article' button, and arrow 5 points to the 'Add' button.



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**.

Case Relationships

Additional Details

Social Details

Articles and Contract Information

ARTICLES

Knowledge Base Article [How to create a case](#)

Show article

Show Comments | Email Article

3. Click or tap →

2. Click or tap →

1. When you find the KB article, click or tap **Show article** to view the KB article.

Microsoft Dynamics CRM | New Email

SEND SAVE SAVE & CLOSE INSERT TEMPLATE INSERT ARTICLE FORM

EMAIL ▾

New Email

Priority Normal Due --

From Contoso Contoso

To Anders Madsen

Cc --

Bcc --

Subject --

Attachments

File Name ↑ File Size (Bytes)

To enable this content, create the record.

B I U

Insert Template Insert Article

How to create a case

KBA-01000-Z2B9Z8

Title

How to create case

Problem or question

How do I create a case

Resolution

1. Click or tap New Case

→

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