Use CRM knowledge base articles to help your customers

Capture common customer questions and issues in KB articles in Microsoft Dynamics CRM

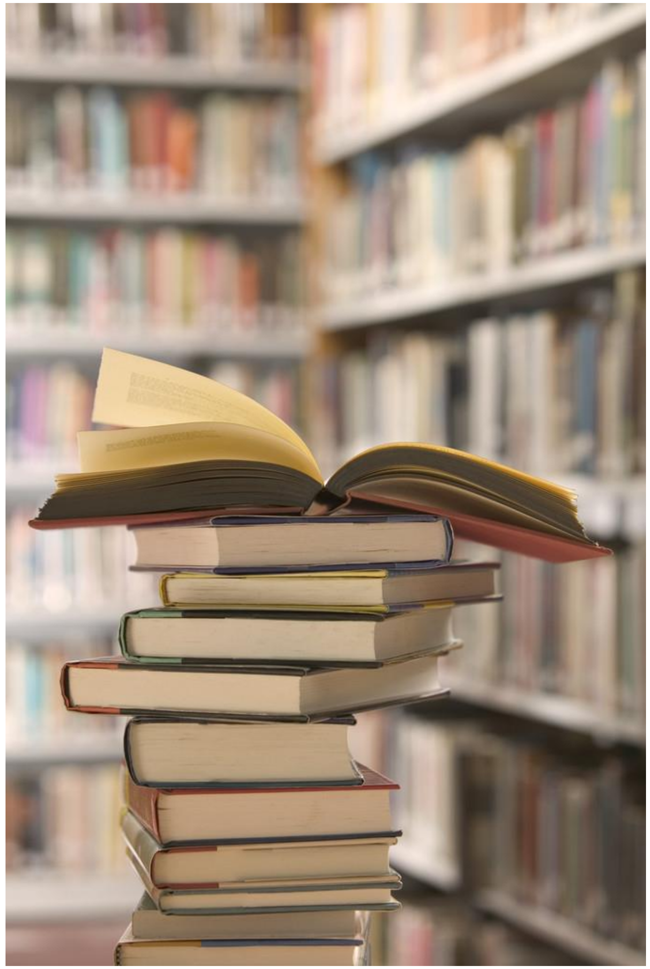
Microsoft

make your service team more efficient

Create a repository of KB articles in CRM 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.

For information on how to set up and use Parature, from Microsoft knowledge base visit the, Parature Knowledgebase site.

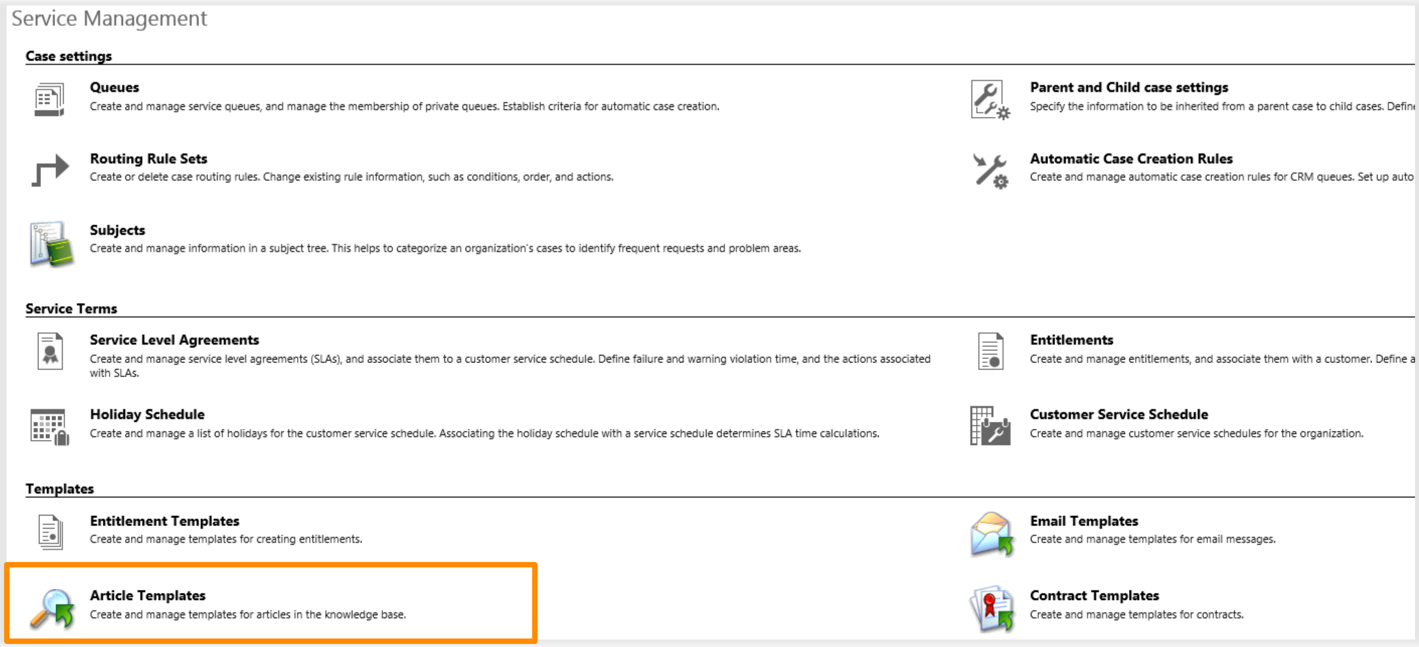


make it easy to create an article

Before your team can create and share KB articles, you'll need to set up a few Article templates. You can make templates for common how-to questions and problems and their solutions—so that your team can use those templates for guidance on writing their own KB articles.

Go to **Articles Templates**.

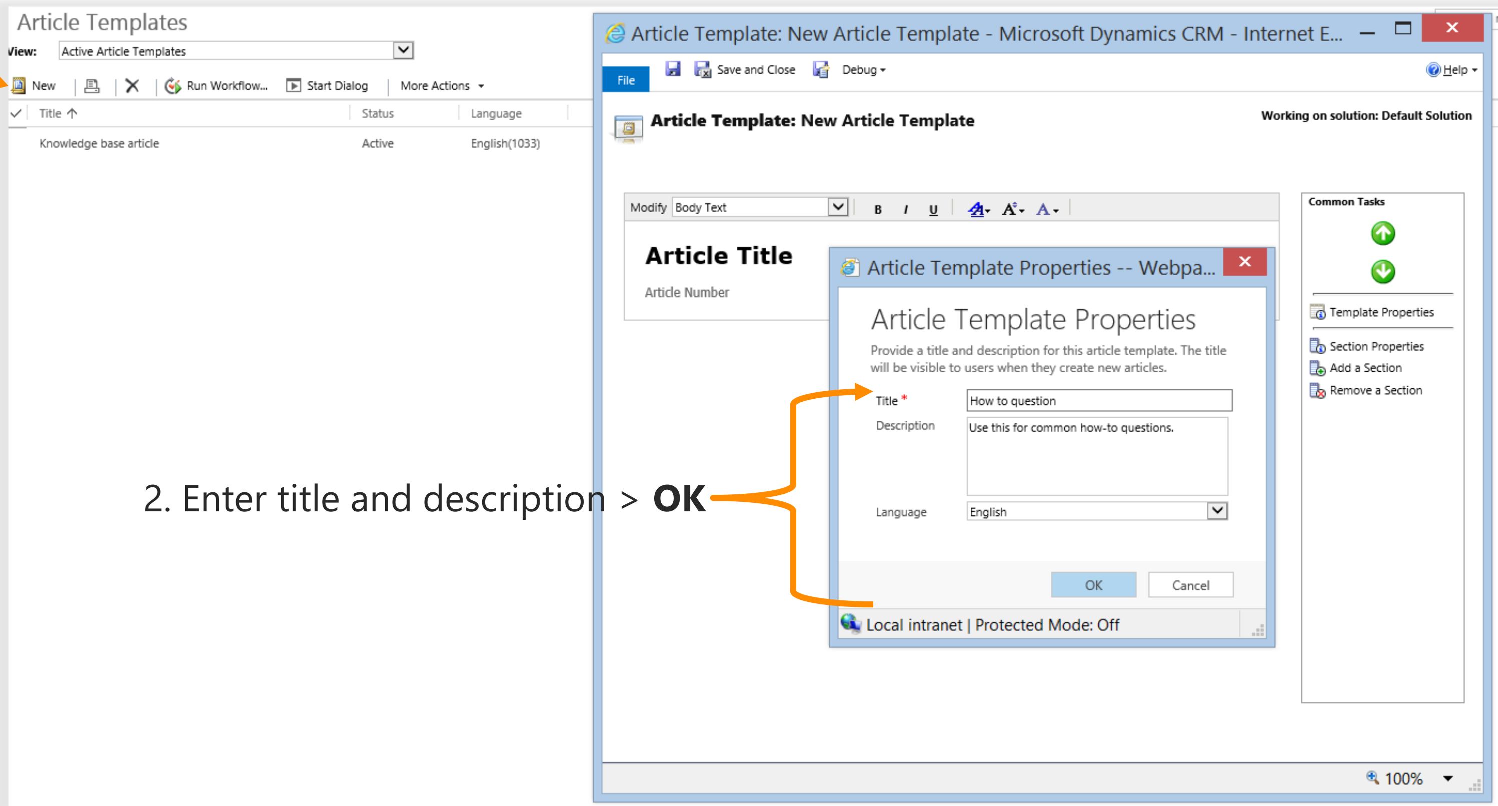
- Latest version of CRM: On the nav bar, choose **Settings** > **Service Management** > **Article Templates**.
- Older versions of CRM : Go to > **Microsoft Dynamics CRM** > **Settings** > **Service Management** > **Article Templates**.



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

use templates

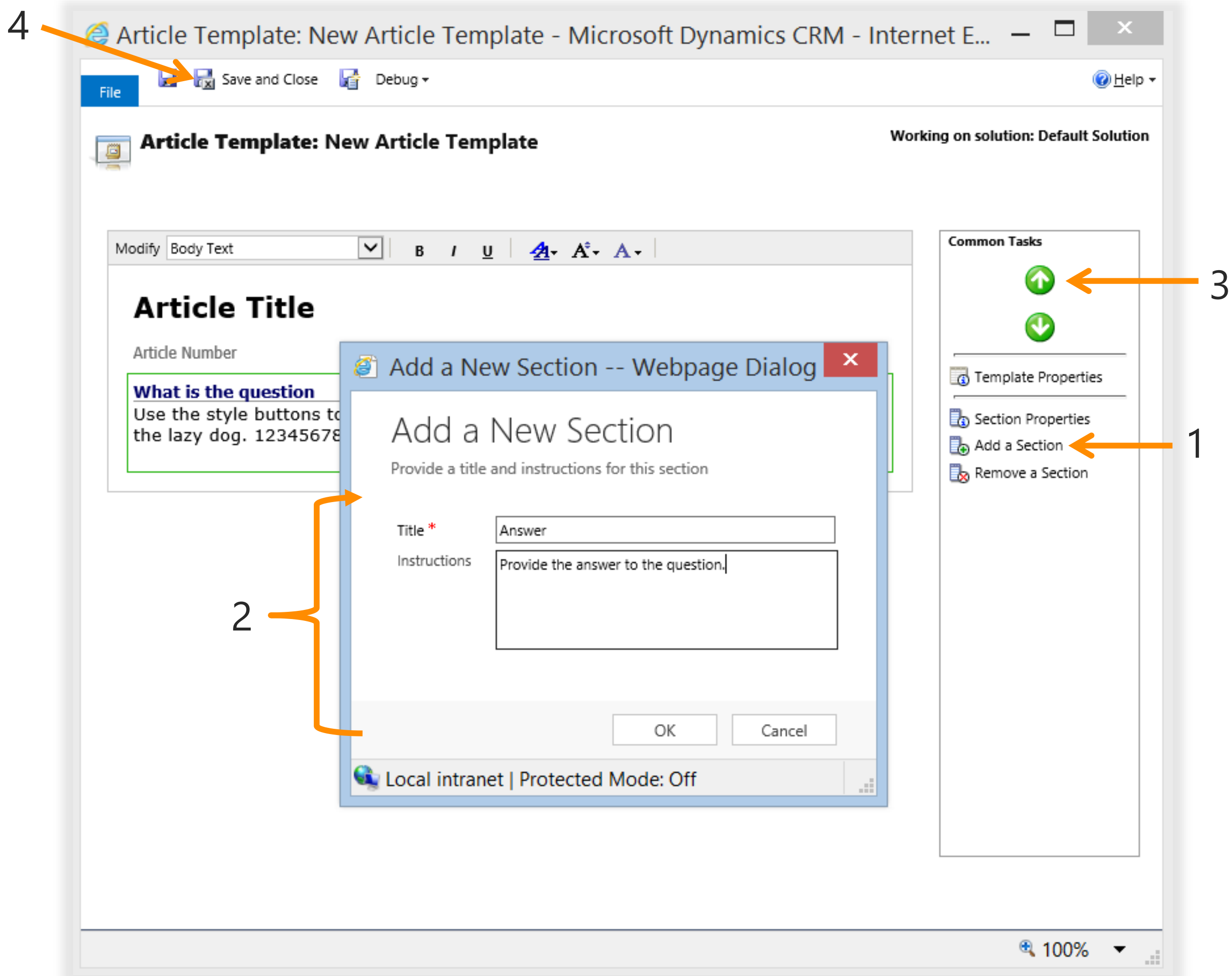
1. Choose **New**



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

...continued

1. Choose to add a section to the template.
2. Enter the title and instructions and then choose, **OK**.
3. Use the arrow to move the sections up or down.
4. When you're done, choose **Save and Close**.

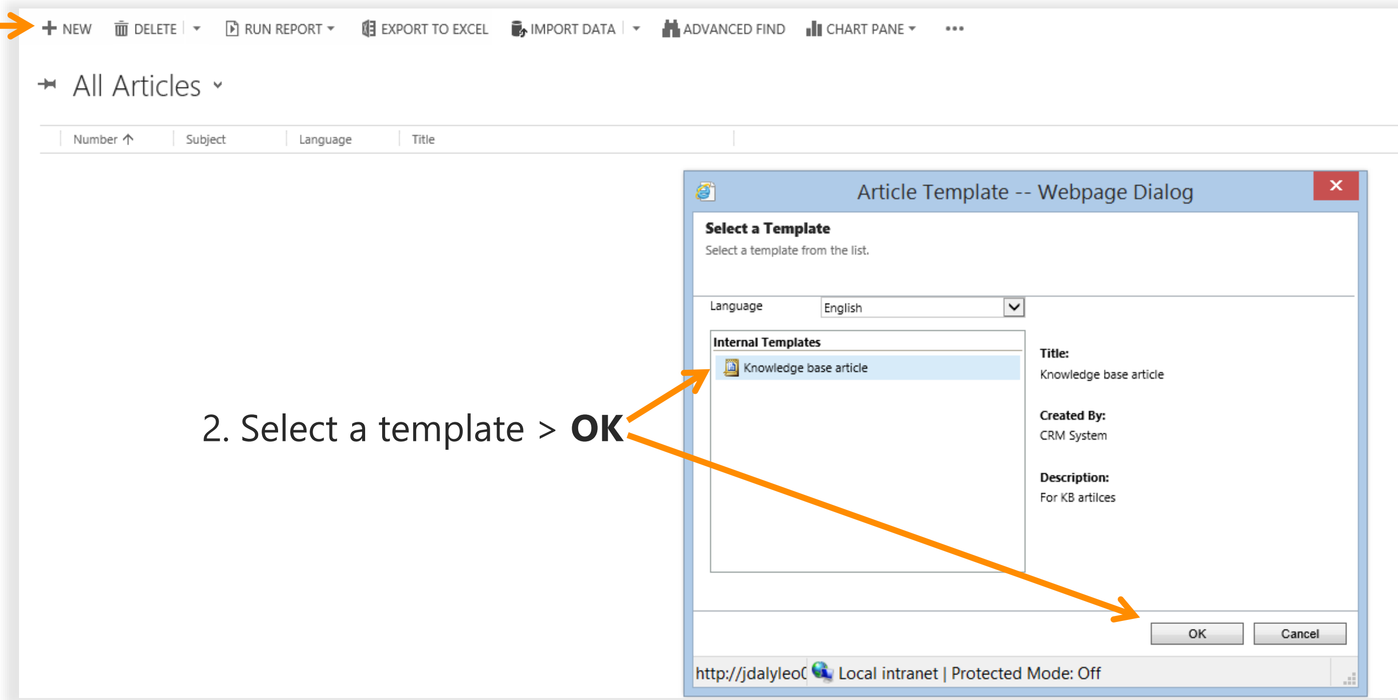


now, start creating KB articles

Go to **Articles**.

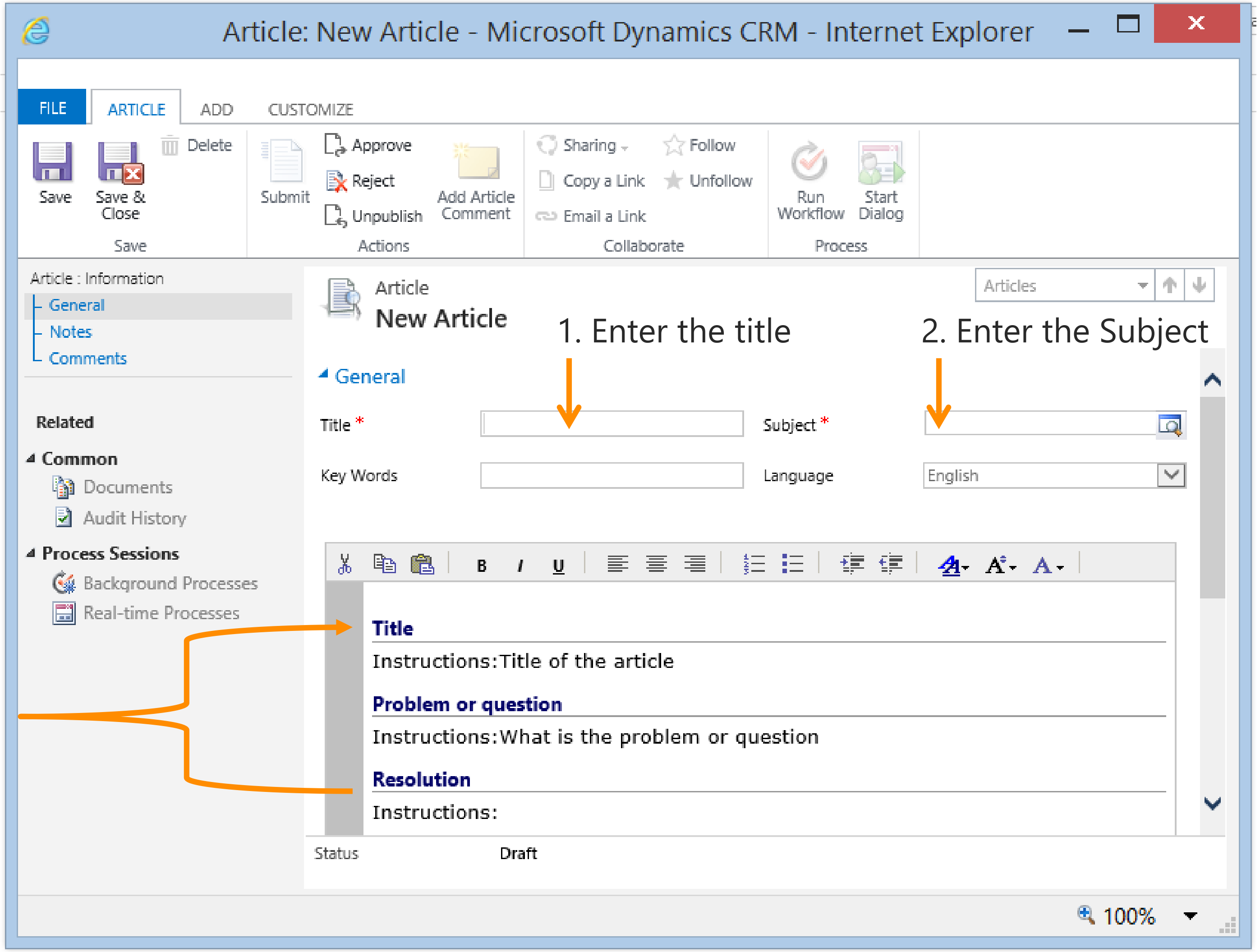
- Latest version of CRM: On the nav bar, choose **Service** , go to **Articles**.
- Older versions of CRM: Go to > **Microsoft Dynamics CRM** > **Service** > **Articles**.

1. Choose **New**



2. Select a template > **OK**

the template will guide you…

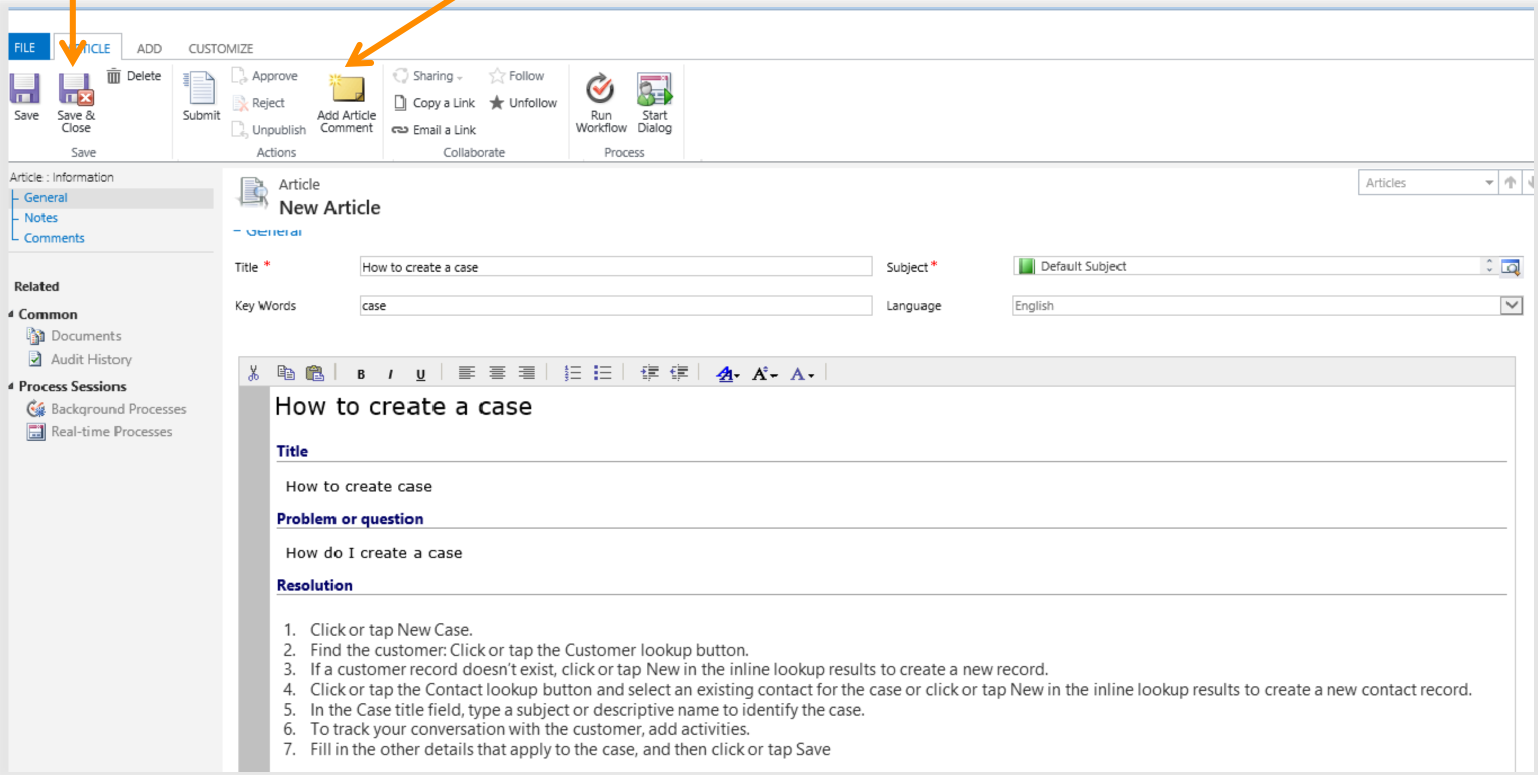


3. Use the instructions in the template to fill out the article sections.

done – save the KB article

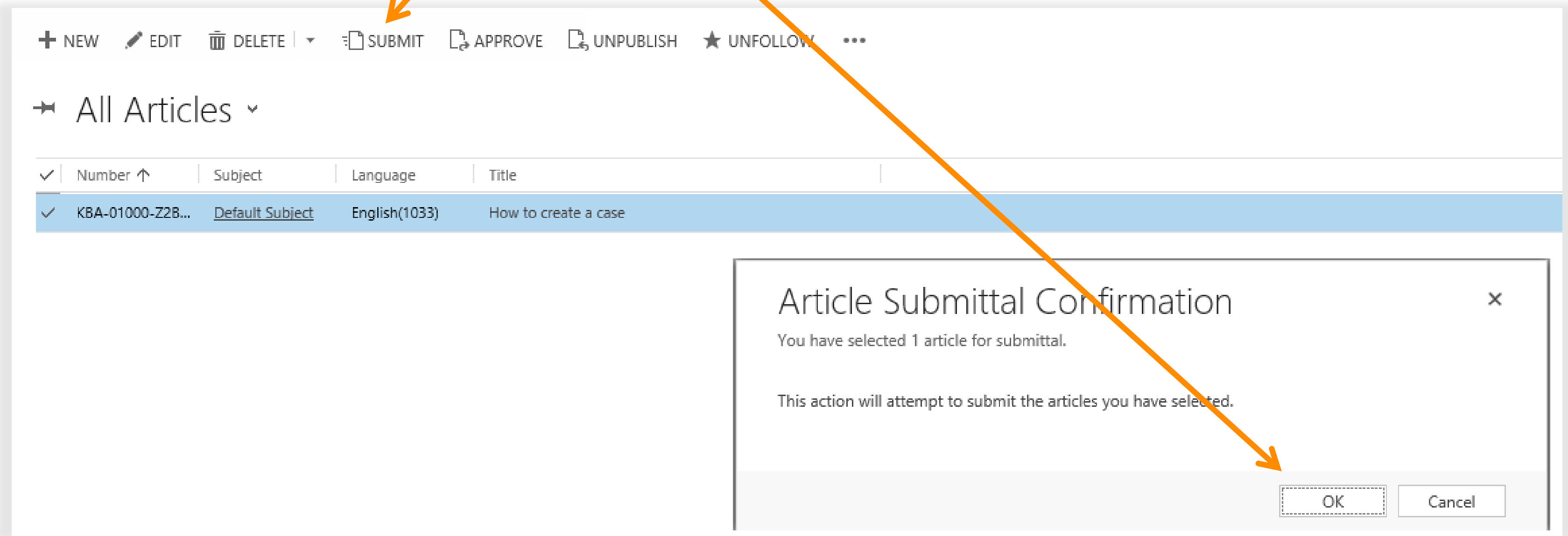
1. Choose **Save and close.**

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



submit it – and get it published

Choose **Submit** > **OK.**

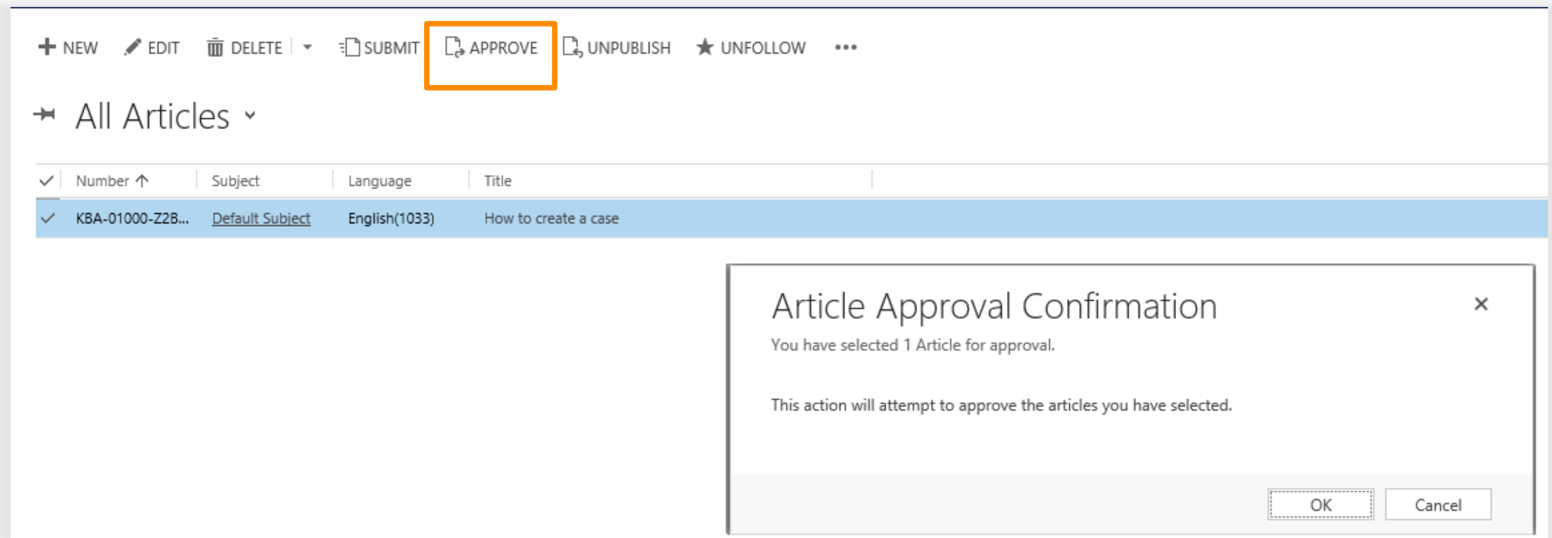


review and publish

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 **Articles**.

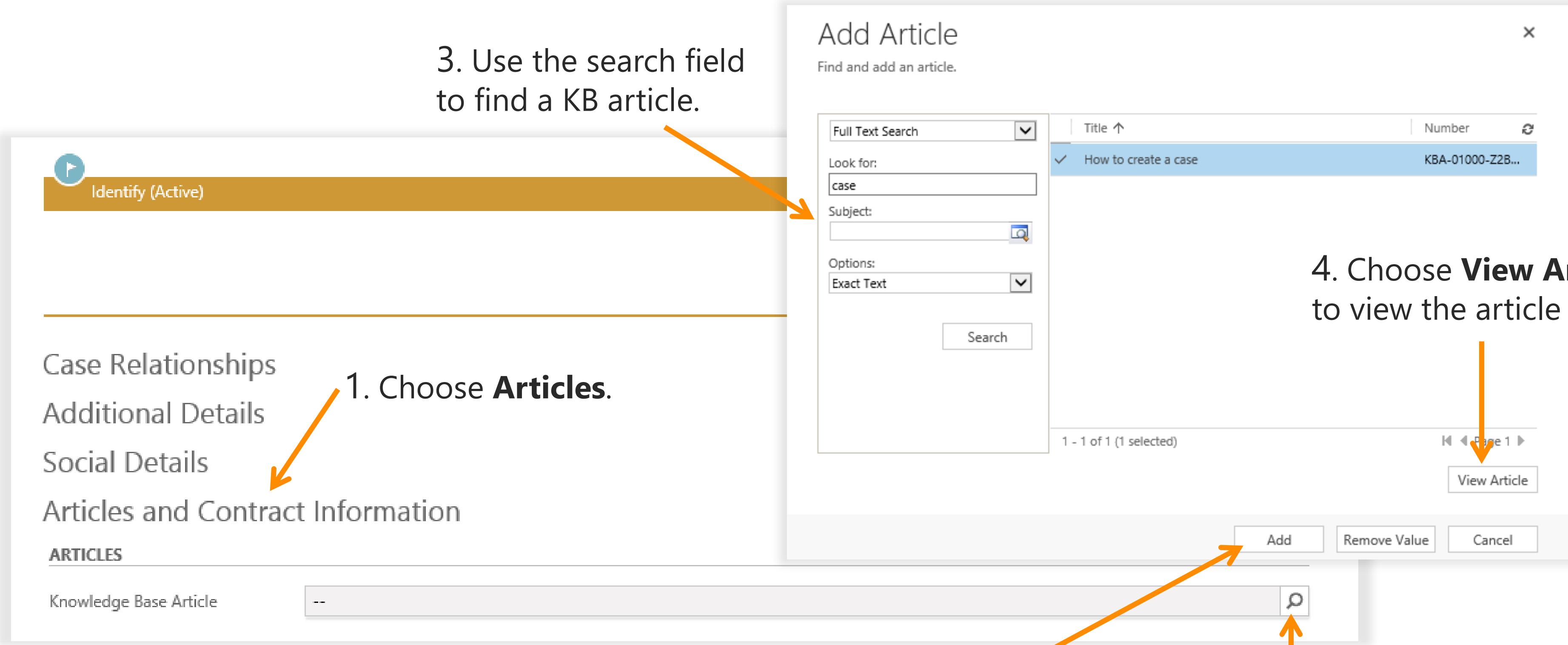
- Latest version of CRM: On the nav bar, choose **Service**, go to **Articles**. Choose **Approve** > **OK.**
- Older version of CRM: Go to > **Microsoft Dynamics CRM** > **Service** > **Article** > **Approve** > **OK**.



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 customers' issues quickly.

From a case form, choose > **Articles and Contact information > Lookup.**



1. Choose **Articles**.

2. Choose the **Lookup** icon.

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

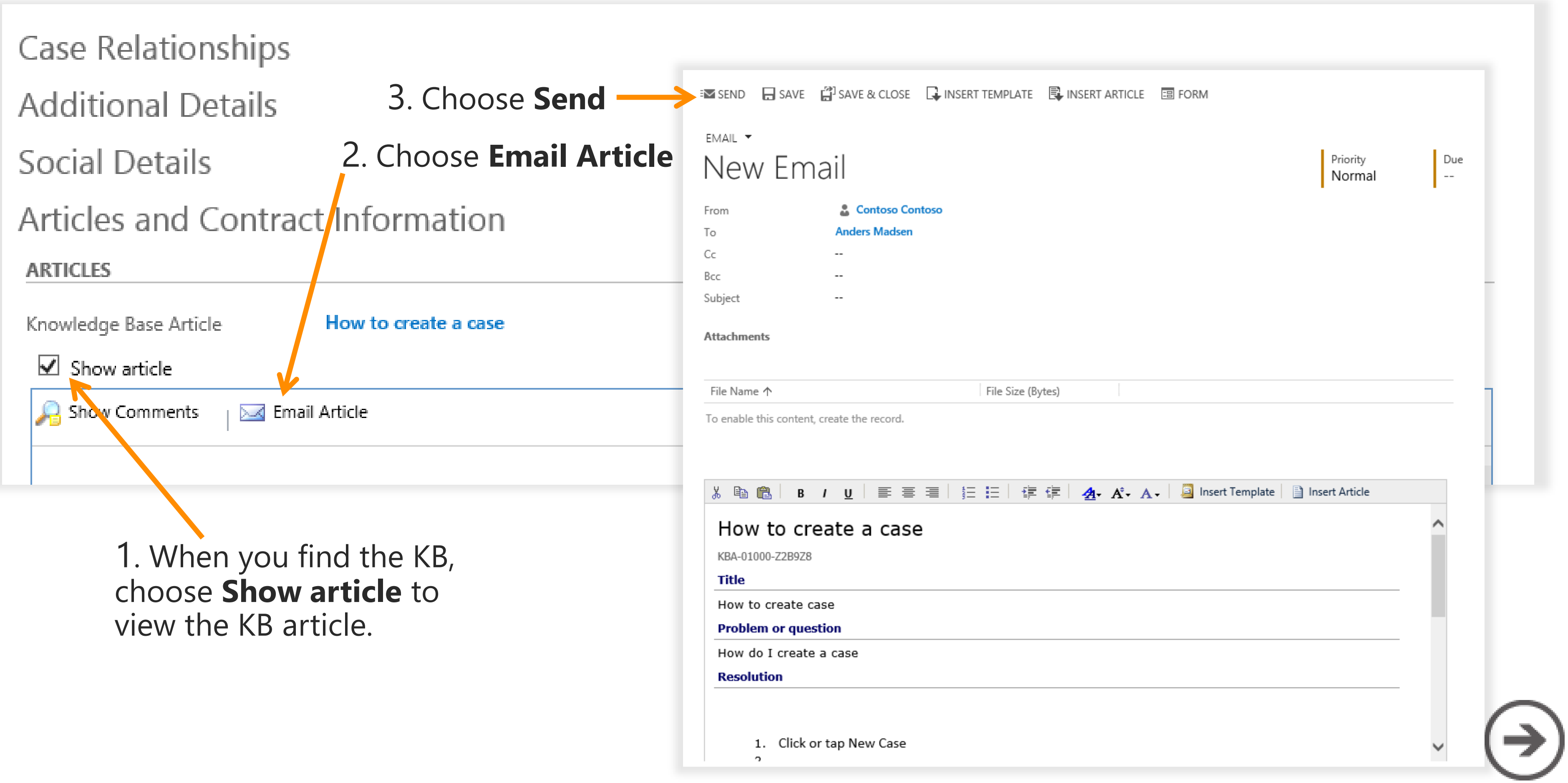
4. Choose **View Articles**, to view the article details.

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 choose > **Email Article** > **Send**.



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Help & Training Site

Version 7.1.0