

Use CRM
knowledge
base articles
to help your
customers

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

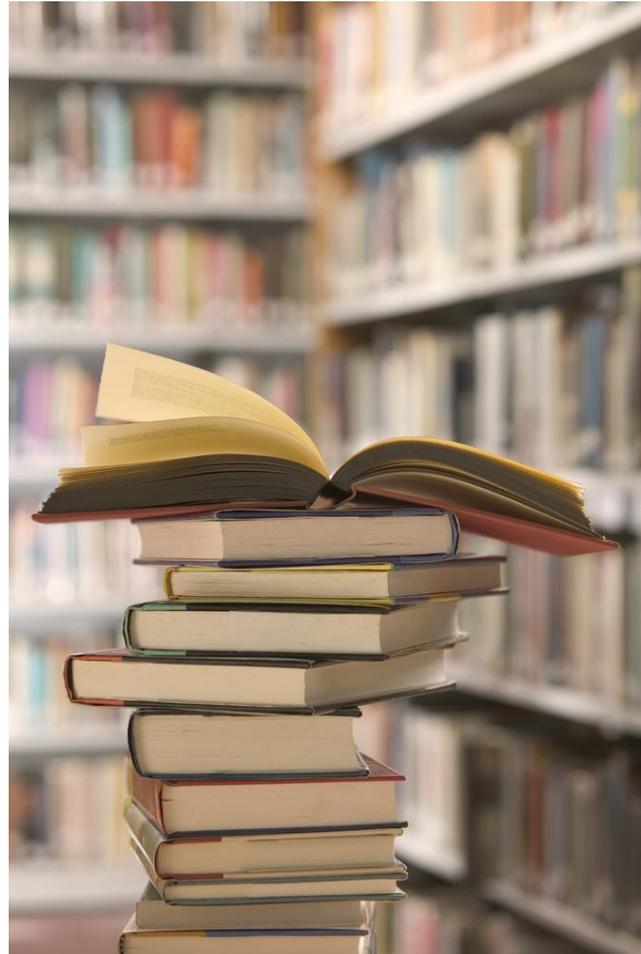


make your service team more efficient

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.

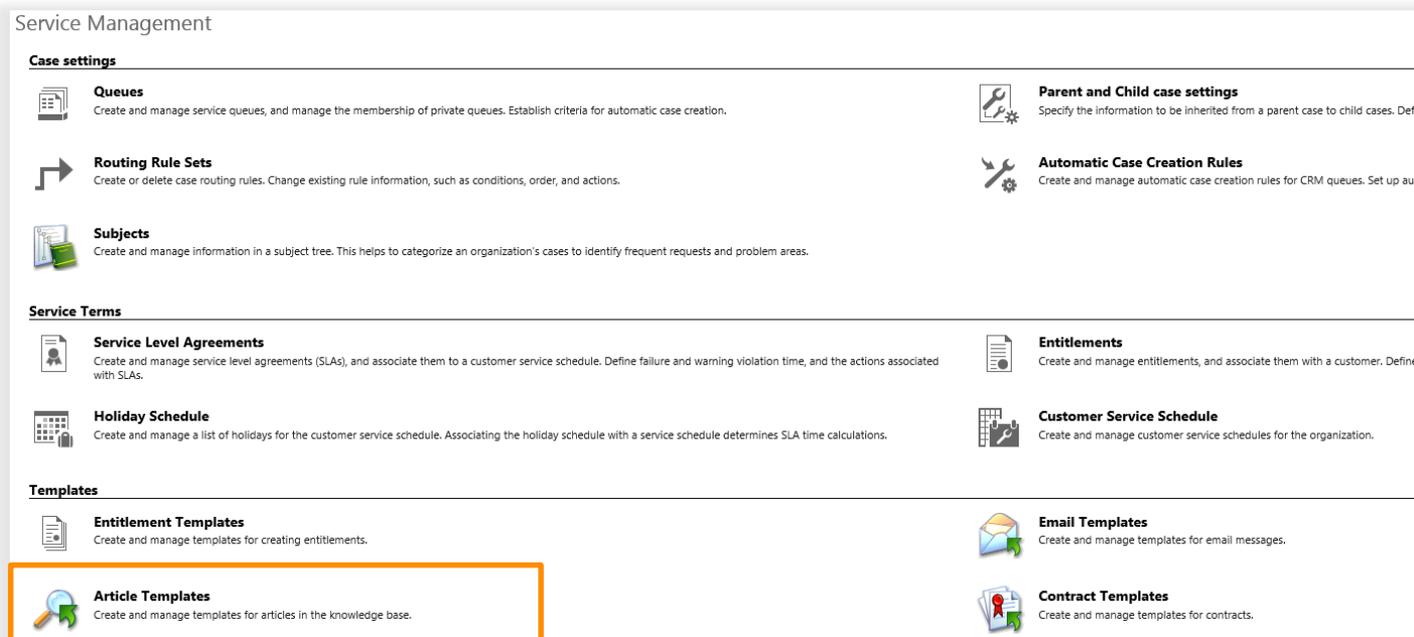


make it easy to create an article

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**

The screenshot shows the 'Article Templates' list in Microsoft Dynamics CRM. The 'New' button is highlighted with an orange arrow. The 'Article Template Properties' dialog box is open, showing the 'Title' field with the text 'How to question' and the 'Description' field with the text 'Use this for common how-to questions.' The 'Language' field is set to 'English'. The 'OK' button is highlighted with an orange arrow.

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

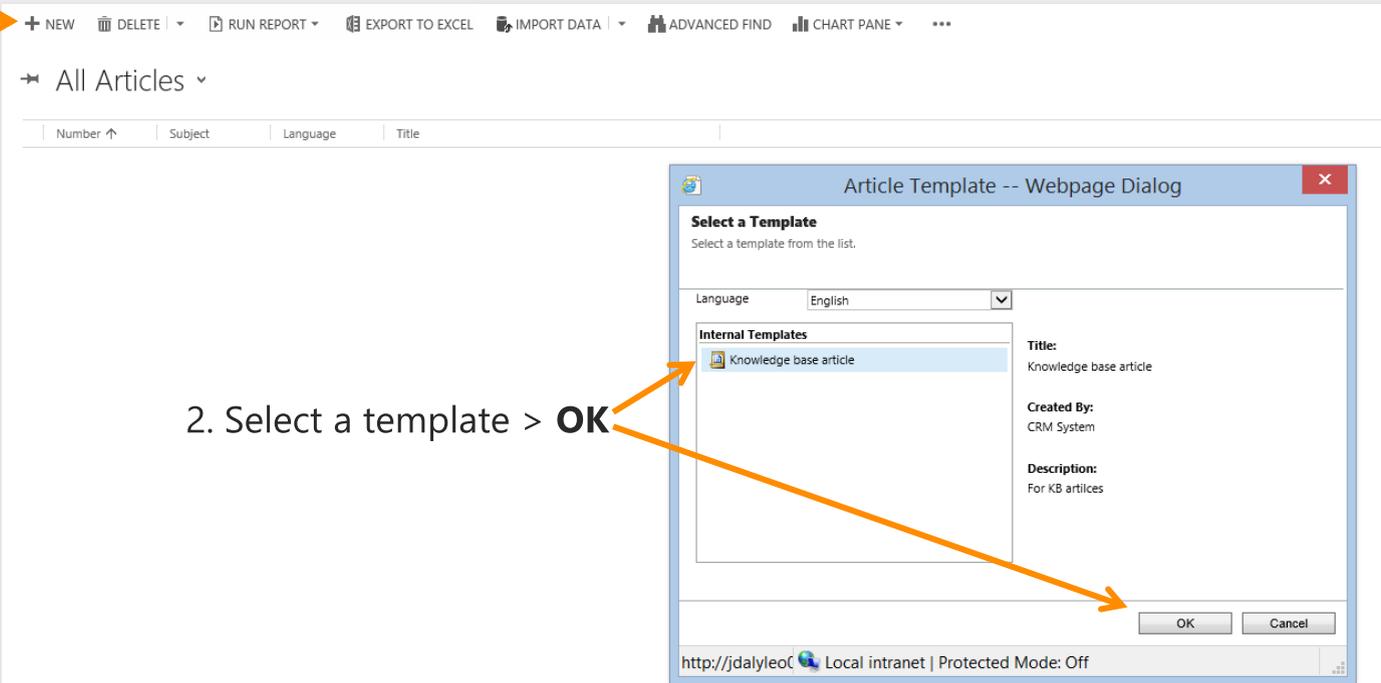


now, start creating KB articles

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**



The screenshot shows the CRM Articles interface. The top navigation bar includes options like '+ NEW', 'DELETE', 'RUN REPORT', 'EXPORT TO EXCEL', 'IMPORT DATA', 'ADVANCED FIND', and 'CHART PANE'. Below the navigation bar, there is a dropdown menu for 'All Articles' and a table with columns for 'Number', 'Subject', 'Language', and 'Title'. An 'Article Template -- Webpage Dialog' is open, showing a 'Select a Template' dialog. The dialog has a 'Language' dropdown set to 'English'. Under 'Internal Templates', 'Knowledge base article' is selected. To the right, the 'Title' is 'Knowledge base article', 'Created By' is 'CRM System', and 'Description' is 'For KB articles'. The 'OK' button is highlighted with an orange arrow.

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 'Information' section shows 'Article: Information' with sub-sections 'General', 'Notes', and 'Comments'. The 'General' section has fields for 'Title *', 'Subject *', 'Key Words', and 'Language' (set to 'English'). The 'Related' section includes 'Common' (Documents, Audit History) and 'Process Sessions' (Background Processes, Real-time Processes). The main content area is a rich text editor with a toolbar and a template structure: 'Title' (Instructions: Title of the article), 'Problem or question' (Instructions: What is the problem or question), and 'Resolution' (Instructions:). The status is '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 template sections 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. Choose **Save and close**.

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

The screenshot shows a software interface for editing a Knowledge Base (KB) article. At the top, there is a ribbon with tabs for 'FILE' and 'ARTICLE'. The 'FILE' tab is active, showing options like 'Save', 'Save & Close', and 'Delete'. The 'ARTICLE' tab shows options like 'Add Article Comment', 'Share', 'Follow', 'Unfollow', 'Copy a Link', 'Email a Link', 'Run Workflow', and 'Start Dialog'. An orange arrow points from the text '1. Choose 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. Below the ribbon, there is a sidebar on the left with 'Article : Information' and 'Related' sections. The main content area is titled 'New Article' and contains a form with fields for 'Title *', 'Subject *', 'Key Words', and 'Language'. The 'Title' field contains 'How to create a case'. 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

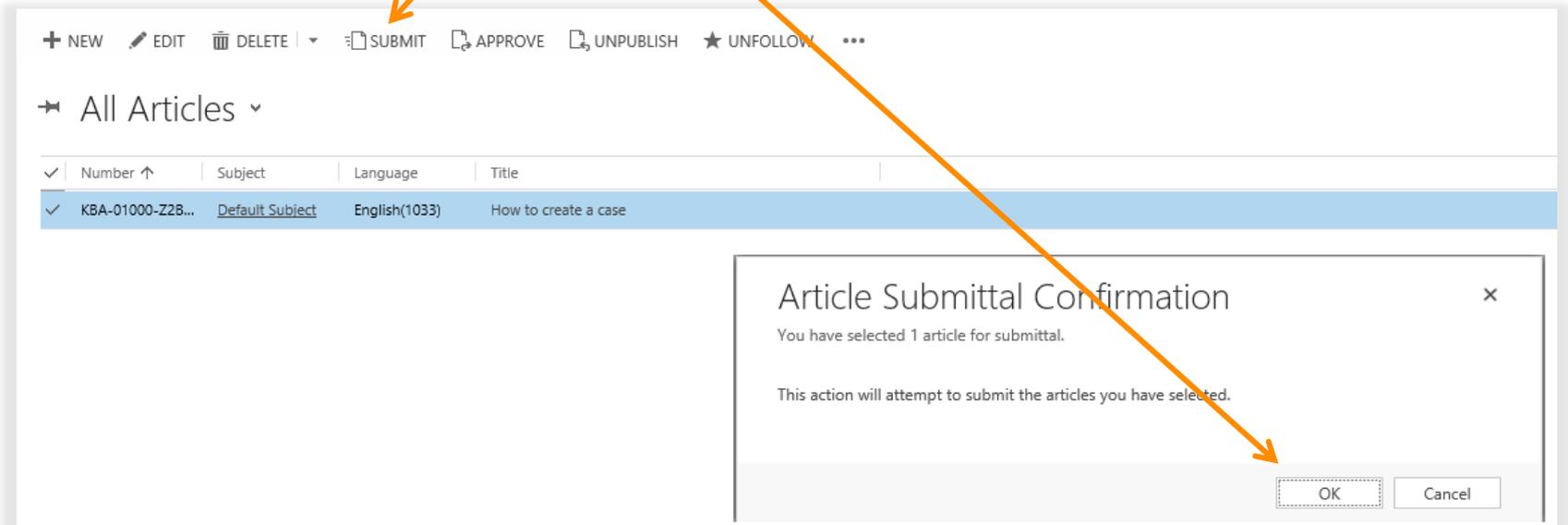
Resolution

1. Click or tap New Case.
2. Find the customer: Click or tap the Customer lookup button.
3. If a customer record doesn't exist, click or tap New in the inline lookup results to create a new record.
4. Click or tap the Contact lookup button and select an existing contact for the case or click or tap New in the inline lookup results to create a new contact record.
5. In the Case title field, type a subject or descriptive name to identify the case.
6. To track your conversation with the customer, add activities.
7. Fill in the other details that apply to the case, and then click or tap Save



submit it – and get it published

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



The screenshot displays a software interface with a top navigation bar containing buttons for '+ NEW', 'EDIT', 'DELETE', 'SUBMIT', 'APPROVE', 'UNPUBLISH', and 'UNFOLLOW'. Below the navigation bar is a section titled 'All Articles' with a dropdown arrow. A table lists articles with columns for 'Number', 'Subject', 'Language', and 'Title'. One article is selected and highlighted in blue: 'KBA-01000-Z28...' with subject 'Default Subject', language 'English(1033)', and title 'How to create a case'. 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 has 'OK' and 'Cancel' buttons at the bottom right. Two orange arrows point from the text 'Choose Submit > OK.' to the 'SUBMIT' button and the 'OK' button in the dialog.

✓	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

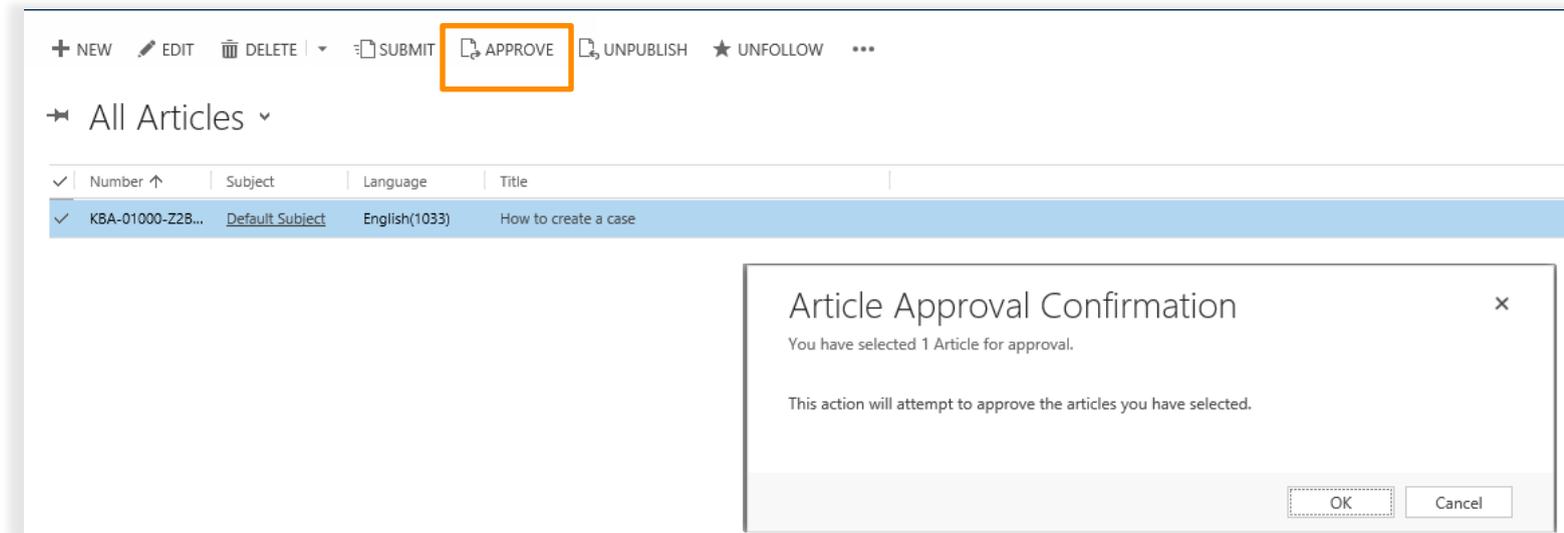


review and publish

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 **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**.



The screenshot shows the Microsoft Dynamics CRM interface. At the top, there is a navigation bar with buttons for '+ NEW', 'EDIT', 'DELETE', 'SUBMIT', 'APPROVE', 'UNPUBLISH', and 'UNFOLLOW'. The 'APPROVE' button is highlighted with an orange box. Below the navigation bar, there is a section for 'All Articles' with a dropdown arrow. A table of articles is displayed with columns for 'Number', 'Subject', 'Language', and 'Title'. One article is selected, with the following details: 'KBA-01000-Z2B...', 'Default Subject', 'English(1033)', and 'How to create a case'. An 'Article Approval Confirmation' dialog box is open in the foreground, containing the text: 'Article Approval Confirmation', 'You have selected 1 Article for approval.', and 'This action will attempt to approve the articles you have selected.' The dialog box has 'OK' and 'Cancel' buttons at the bottom right.



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 Contract information** > **Lookup**.

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

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

1. Choose **Articles**.

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

2. Choose the **Lookup** icon.

The image shows a screenshot of a software interface. On the left is a case form with a sidebar menu containing '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. An orange arrow points from the 'Articles and Contract Information' menu item to the 'Add Article' dialog box. The dialog box has a search field with 'case' entered, a search button, and a list of results. One result is selected: 'How to create a case' with ID 'KBA-01000-Z2B...'. Below the list are 'Add', 'Remove Value', and 'Cancel' buttons. An orange arrow points from the search field in the dialog to the search bar in the case form. Another orange arrow points from the 'View Article' button in the dialog to the 'ARTICLES' section in the case form. A third orange arrow points from the 'Add' button in the dialog to the search bar in the case form. A fourth orange arrow points from the 'Lookup' icon in the case form to the 'Add' button in the dialog. A circular arrow icon is in the bottom right corner.

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**.

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. Choose **Send**

2. Choose **Email Article**

1. When you find the KB, choose **Show article** to view the KB article.

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.

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

2.

➔

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