

Podcast Script: Knowledgebase

(Susie)

Welcome to this 60 Second Sugar Snippet. Today, Lori (who is the manager of our technical support team) will be talking about our Knowledgebase product.

(Lori)

The Knowledgebase module is Available in Sugar Professional and Sugar Enterprise editions and was introduced in the 4.5.1d release. The Knowledgebase module is installed by default in the 5.0 and later versions of Sugar and is Module-loadable in the 4.5.1 version.

Use the Knowledgebase module to improve your efficiency by documenting common support issues. This will aid in driving consistency in employees delivering repeatable solutions to your customers as well as to speed up resolution times as there will be no need to solve the same mystery over and over again. This will in turn decrease inbound volume to your support organization and give your customers the tools to help themselves... a happy customer is one who never needs to call you!

You can also use the Knowledgebase for internal use. You have the ability to create an article from a case by clicking on the create article button at the detail view of a case. When you create an article from a case, the data from the case record is copied into the new Knowledgebase article and it is placed in draft mode. The case subject becomes the Knowledgebase title and the case number, subject and description are placed in the Knowledgebase description.

Now, let's discuss the features of the Knowledgebase module. In 5.0, TinyMCE was added as the HTML editor. TinyMCE is an Open Source, platform independent web-based Javascript HTML WYSIWYG editor created by Moxiecode Systems. You can also attach files to articles, embed images into the body of an article, provide revision numbering, set an Expiration date, select who the author and approver will be as well as mark the article for external use.

Now let's move on to Knowledgebase tags

- Hierarchical tagging allows for great flexibility in organizing your Knowledgebase
- Parent tags can be defined, as well as child or nested tags
- Admins can edit and delete tags as well as batch update articles to tags
- The FAQ tag is used by Sugar Portal to build the FAQ page
 - This is the Only tag that is included during install
- Untagged articles are identified for you

- Making your articles available for external use is easy! There are two methods for sharing a Knowledgebase article with an external audience
 - You can Email an article from Sugar to a customer, by clicking on the Send Email button at the detail view page of the Knowledgebase article

- You can also publish the Knowledgebase article to Sugar Portal for customer self-service by checking the external article checkbox, setting the status to Published and the expiration date to some time in the future.

Let's now move on to browsing and searching for articles. Use the tree-view based tag hierarchy to Browse Knowledgebase articles or Search Knowledgebase articles through a variety of capabilities using:

- Contains or Exclude key words,
- Popularity of viewing frequency
- Recent additions or recent updates
- Pending my approval
- Full-text search
- ... and many more!

One thing to note is that the full text search requires specific database configurations and Microsoft SQL Servers must have Advanced Services installed. Check the 5.0 Installation and Administration Guide for more information.

(Susie) And that's your 60 Second Sugar Snippet. Goodbye!