

Podcast Script – KB 101

Welcome to this sixty second Sugar snippet. My name is Carlota, the Knowledge Base Writer for SugarCRM Customer Support. Susie's graciously giving me some airtime to introduce folks to Knowledge Bases.

If you're not sure what a Knowledge Base, or "KB," is... it's an information repository containing Frequently Asked Questions, How To's, Best Practice Guides, and Problem Resolutions. It functions as a self-service center for your staff and customers, allowing them to get answers to many questions whether or not your business is open. It's a library of useful information that is open 24 hours a day, 7 days a week.

A KB is different from product documentation primarily because product documentation is a static description of features and intended product use. It is only updated when there are changes to your product. A KB, on the other hand, is dynamic. It's constantly updated with input from your staff or customer base as they address questions and concerns that arise from the actual use of your product. Frequently asked questions, processes, and best practices for your product and company are also added over time.

SugarCRM Professional and Enterprise editions both include a Knowledge Base Module for internal use. SugarCRM Enterprise includes the Sugar Portal feature, which is necessary to display KB articles externally.

The SugarCRM KB combines the collaborative ability of a wiki with the ability to formally manage and present content. Any employee logged into the SugarCRM instance will be able to create, edit, or view a KB article, but KB articles must be selected specifically for external viewing. Customers will be able to view and search these articles through Sugar Portal, but they will not be able to edit or alter them.

The SugarCRM KB includes both a plain text editor and a WYSIWYG HTML editor for richer content creation. It allows for embedding images, publishing attachments from the SugarCRM application, and setting expiration dates for articles viewed externally.

The KB Module is another great tool in the SugarCRM application that allows you to effectively and quickly communicate with your staff and customers. If you have tips or tricks you would like to share, email us at kb@sugarcrm.com and we'll cover them in a future podcast.

And that's your sixty second Sugar snippet. Goodbye!