

Podcast Script – KB Life Cycle

Welcome to this sixty second Sugar snippet. This is Carlota, the Knowledge Base Writer for SugarCRM Customer Support. Today I'm going to describe the Case to KB Life Cycle and how we at Sugar create KB articles.

As I said in the KB 101 podcast, a knowledge base is an online repository of information that is accessible to your employees and customers 24 hours a day, 7 days a week. The idea is that you collect frequently asked questions and problem resolutions from your case module and turn them into articles for the KB. As your KB grows, your users will look there more frequently for articles to resolve their problems.

In the Case to KB Life Cycle, a user experiencing a problem with or having a question about your product first checks the KB. If the answer is not in the KB, they contact your customer service or support department. Once your technician identifies and resolves the issue, that issue is turned into a KB article so that next time a customer encounters the issue and checks the knowledge base, they can resolve the problem immediately on their own. The more cases you capture in the knowledge base, the better educated your customers and staff will be.

In both SugarCRM 5.0 Professional and Enterprise Editions, there is a button on Cases that says “Create Article.” You can use this to promote cases into the knowledge base. Within Sugar, we have actually customized our Case to KB interface so that we can prioritize cases for a technical writer (that's me). This gives us the ability to generate articles for hot issues in under 24 hours, often on the same day the issue is identified.

In my next snippet, I'll describe more about the writing process, the tagging process, and getting information out to your audience.

If you have tips or tricks you would like to share, email me at kb@sugarcrm.com.

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