



Knowledge Base

Help Documentation

Knowledge Base

Knowledge Base Overview

The knowledge base is a tool companies can use to share information with employees, customers and partners. In its simplest form, SmarterTrack's knowledge base is an online repository of articles that helps agents and customers solve issues quickly and efficiently. A well-organized knowledge base can save organizations money by decreasing the amount of employee time spent trying to find information about company products, policies, and/or procedures. As a customer service tool, a knowledge base can give customers easy access to information that would otherwise require a phone call, live chat or email ticket.

To access the knowledge base, log into the management interface with your agent account. Then click on the Knowledge Base icon .

The knowledge base section of the management interface is divided into 3 areas: navigation pane, content pane and preview pane. By default, SmarterTrack will display knowledge base articles for all brands. However, agents can review articles for a specific brand by selecting it from the brands dropdown at the top of the navigation menu.

The screenshot displays the SmarterTrack Knowledge Base interface. On the left is a navigation pane with categories like 'All', 'Assigned to Me', 'Drafts', 'Review', 'Moderation', 'Stale', 'Broken Links', 'By Agent', 'General Topics', 'Hosted SmarterTrack Helpdesk', 'Internal Forwards', 'Previous Versions', 'SmarterMail', 'SmarterStats', 'SmarterTrack', 'Utilities and Conversion Tools', and 'Advanced Search'. The main content area is divided into three panes: a navigation pane on the left, a content pane in the middle, and a preview pane on the right. The content pane shows a list of articles, with 'The Importance of Language Selection' selected. The preview pane shows the article's content, which discusses the importance of language selection in SmarterMail. The article text states: 'The language a user selects/sets for their account in SmarterMail -- also known as localization or internationalization -- is **EXTREMELY** important. That's because it's much more than simply what is seen in the webmail client. SmarterMail's language selection is the basis for everything: the things you see in the webmail interface as well as what's returned to an email client when you connect using Outlook, eM Client, iOS Mail and more. That includes things like settings labels, folder names, calendars and calendar appointment, contact groups, email message content, log files and essentially everything within SmarterMail.'

Below the article text, there is a screenshot of the SmarterMail user interface showing the 'Utilisateur' (User) settings. The 'Langue' (Language) dropdown is highlighted with a red box and set to 'français'. Other settings visible include 'Fuseau Horaire' (Time Zone) set to '(UTC-07:00) Arizona', 'Adresse Email de Réponse' (Reply Email Address) set to 'myAddress@example.com', and 'Adresse Email de Secours' (Emergency Email Address) set to 'myAddress@example.com'. There are also buttons for 'Sauvegarder' (Save), 'Annuler' (Cancel), and 'Changer le Mot de Passe' (Change Password).

Below the screenshot, the text reads: 'Therefore, it is **extremely critical** that whatever language is set in SmarterMail is the language you actually want to use. For example, **BEFORE** importing a PST from Microsoft Outlook, it is essential that the language selection in SmarterMail matches the language of the PST file. If this isn't done, you will have 2 versions

Navigating the Knowledge Base

In the navigation pane, you can select the articles that are shown on the screen. The following views are available under the Knowledge Base area of the navigation pane:

- All - Managers and administrators will be able to see all articles in the knowledge base, regardless of their status or to whom they're assigned.
- Assigned to Me - Lists the articles that are assigned to the agent logged in.
- Drafts - Lists all articles flagged as drafts.
- Review - Lists all articles flagged for review.
- Moderation - Lists all articles that have unmoderated user feedback.
- Stale - Lists all articles that have reached their stale date. The timeframe for when articles become stale is set in the Management Interface settings .
- Broken Links - SmarterTrack scans articles for any broken internal or external links. This lists all articles that contain broken links.
- Advanced Search - Allows for a more advanced search of all knowledge base articles.
- By Agent - Lists all agents who have articles assigned to them.

In the Folders area of the navigation pane, a list of all existing folders will be available. Folders can be created for products, issue types or in any other way to keep your articles organized and easy to access, both for customers and for agents. Click on the folder or subfolder and the articles within that folder will load in the content pane. For more information on organizing articles by folder, please see [Managing Knowledge Base Folders](#) .

In the content pane, the list of articles can be found. In general, the following details can be seen for each article in the list:

- Article Title - The title of the article.
- Folder - The location of the article.
- Language - The language(s) assigned to the article. When portal visitors select a different language for the portal, the articles that have been assigned to that language will appear in the knowledge base.
- Flags - Whether the article is flagged as draft, private or for review.

Performing Knowledge Base Actions

In general, the following options are available from the content pane toolbar:

- New - Creates a new knowledge base article in the selected folder or with the selected flag. For example, if Drafts is selected in the navigation pane, clicking New will open a compose window that has been marked as a Draft.

- **Actions** - Click this button and select the appropriate option to select all articles, move articles, copy articles or change the status of articles.
- **Select All** - Selects all knowledge base articles in the content pane.
- **Delete** - Deletes the selected knowledge base articles. For more information, see [Deleting Knowledge Base Articles](#) .
- **Mark** - Click this button and select the appropriate option to change the status of the selected article(s).
- **Public** - Marks the article as public. Public articles are visible to everyone.
- **Private** - Marks the article as private. Private articles are only visible to administrators and agents and are great for internal guidelines, policies, troubleshooting steps or any other information needed by agents and managers.
- **Draft** - Marks the article as a draft. Drafts are only visible to administrators and agents. Draft articles are those that are essentially finished but are still awaiting review and/or revision prior to making them public or private.
- **Reviewed** - Marks the article as having been reviewed for accuracy. Agents typically use this option to indicate that an article has been reviewed/modified after another agent has flagged it for review or the article has become stale. Note: Stale timeframe can be modified by System Administrators in the Management Interface settings .
- **Review** - Flags the article for review. Agents typically flag an article for review when they want the article edited for content, clarity, or grammatical errors.
- **Move** - Moves the selected article(s) to another folder.
- **Copy** - Copies the selected article(s) to another folder.
- **Transfer** - Transfers responsibility for the article to a new agent.
- **Rescan All for Broken Links** - Initiates a scan of all articles for any broken URLs or links to external and/or internal content.
- **Sort** - Sorts the list of articles in ascending or descending order based on the selected option, such as subject, helpfulness, last reviewed, etc. Clicking on Reset Sort Order will return the sort order to its default status.
- **View - Refresh** - Click this button to force a refresh of the articles.

Creating New Knowledge Base Articles

To create a new knowledge base article, click the New Item icon and select Knowledge Base . Alternatively, you can head to the Knowledge Base section and click on the New button. Regardless of how you start a new article, a pop-up window will open that the agent will use to create the article.

The new article window contains a tab to compose the article, a tab to set article options for language and brands, and a history tab that contains information on the article's creation date and any review or modification dates.

Compose Tab

This is where you actually create the article. The Compose tab includes a what-you-see-is-what-you-get (WYSIWYG) editor that will allow you to create stylish, HTML-formatted articles. This includes the ability to:

- Add links to internal and/or external Web pages
- Embed media content - either from your site or from sites like YouTube
- Stylize text and fonts, including bolding text, italicizing, etc.
- Create numbered and/or bulleted lists
- Highlight important sections with background colors
- Much more...

The following fields will appear on the Compose tab for any new article:

- Title - Type the title of the article in this field. This will also act as the link to the article, so a good idea is to use a keyword-rich title for your articles so that your article URLs are SEO-friendly.
- Summary - Type a brief summary of the article in this field. This summary text is automatically used to generate an SEO meta description tag for the article. This tag is an HTML attribute that provides a concise summary of the web page. These descriptions commonly appear underneath the blue clickable links in a search engine results page (SERP). Note: While there is a 256 character limit to article summaries, we recommend keeping the summary under 160 characters, as search engines generally truncate snippets longer than 160 characters.
- Folder - To specify the folder in which this article should appear, select the appropriate folder from the list.
- Assign To - To select an agent who will be responsible for the article, select the agent from the list.
- Flags - Flag the article as private, draft, for review or featured on portal. For more information, see Knowledge Base Overview
- WYSIWYG Editor - The what-you-see-is-what-you-get (WYSIWYG) editor where the article is created.

Options Tab

The following options are available in the options tab of the new article window:

- Language - To specify the language, select the appropriate language from the list.
- Brands - To specify which brands the knowledge base article applies to, select the appropriate checkboxes.

The file manager is a great way for article creators to upload, store, organize and re-use various file types. Most often, these will be images for use in articles - screenshots, logos, diagrams and more. However, other files can be uploaded and re-used as needed.

Using the file manager is rather simple. When you click on the File Manager button in the new article compose window, a modal window will appear. The following options are available in the File Manager modal:

- Actions - Clicking the Actions button allows you to create folders for your uploads. Folder names should probably correspond to your KB article folders, but they can be any name you like that will help keep images organized. For example, create folders for images, for videos, for logos, etc.
- Insert - This allows you to insert a specific file into the article being created. To insert a file, simply go to the folder containing the image and a list of files will appear. Select the appropriate file and click the Insert button. When inserting a file, the following options are available:
 - File - This is the file name of the file that was selected. Therefore, it's not editable.
 - Type - This is the type of file being inserted. File types include: Link, which is a text link to an external or internal Web page or an entire website, or a link to a video hosted either locally or on a video service; Image, which can be an image type such as a PNG, a JPG, etc.; Media, which is generally for media types such as MP3 files.
 - Link Text - Only available for Links. This is the text that will be used for the link within the article. Text links are generally fairly descriptive, describing the link type, location or what the user can expect when it's clicked on.
 - Target - Only available for Links. This is how the link will open when it is clicked. The default Target is "_blank", which means a new window will open when the link is clicked.
 - Tool Tip - Only available for Links. This is the text that appears when a user puts their mouse over the link text, without clicking the link. Generally, this is a simple description of where the link takes the person who clicks on it.
 - Width - Only available for Images and Media. The width of the image, in pixels. While it is possible to modify this to change the width of the original image, doing so without adjusting the height of the image accordingly may distort the image as it appears in the article.
 - Height - Only available for Images and Media. The height of the image, in pixels. While it is

possible to modify this to change the height of the original image, doing so without adjusting the width of the image accordingly may distort the image as it appears in the article.

- Alt Text - Only available for Images. This is the text that appears when a user puts their mouse over the image. It is also used for accessibility features for the visually impaired. This text should be something short, like the title of the image.
- Description - Only available for Images. A brief description of the image: what it is, what it's for, etc.
- Upload - Allows you to upload a file. When you click upload, a file browser window will open that allows you to select the file to upload from your desktop or laptop or from any mapped drives.
- Delete - Use this to delete any files uploaded. Realize that any files deleted, but that are still used in existing articles, will no longer appear in those articles.
- Close - Closes the file manager modal window. --%>

History Tab

The History tab shows agents the full history of the article, including the initial creation date, when an article was reviewed, when it was modified and more. The information available includes the name of the agent who performed the action so that any follow up can occur, as needed.

Managing Knowledge Base Folders

Knowledge base articles are stored and organized using folders. For example, a financial institution using the knowledge base as a self-serve resource for customers may organize all of the articles related to savings accounts in one folder and articles related to checking accounts in another folder.

Creating Knowledge Base Folders

To add a new folder, click the Actions menu in the navigation pane toolbar and click Add Folder This will open a new folder window with the following fields:

- Folder - The name of the new folder.
- Parent Folder - Select a parent folder from the list. Since folders are organized by a hierarchy, the new folder will be a subfolder of the parent folder.
- Display folder in portal search menus - Check this box to allow portal visitors to choose this folder from the drop-down list when searching the knowledge base.
- Include articles in automatic searches - Enabling this means that any article added to this folder will be included in any automatic searches and article display prior to users submitting live chats or tickets using your portal.

Click Save .

Moving Knowledge Base Articles to Another Folder

Moving knowledge base articles between folders in SmarterTrack is easy. First, open the folder containing the article(s) you want to move. Then select the desired article(s). Click the Actions menu in the content pane toolbar and click Move . Then select the name of the destination folder and click OK .

Renaming and Deleting Folders

Agents can change the name of a knowledge base folder anytime or delete it completely if it is no longer needed.

To rename a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Edit Folder . In the Folder field, type the new folder name and click Save .

To delete a folder, select the appropriate folder in the navigation pane. Click the Actions menu in the navigation pane toolbar and click Delete Folder . Then click OK to delete the folder and all of its contents.

Viewing Knowledge Base Articles

To view a knowledge base article, simply click an article and it will display in the preview pane. If you would rather view the article in a popup window, double-click the article instead. Note: Double-clicking an article also enables you to edit the article.

In general, the following options are available from the preview pane toolbar:

- Edit - Edits the selected article.
- Transfer - Transfers the ticket to a new agent.
- Add - Click this button and select the appropriate option to add a comment or rating to an article.
- Actions - If any manual events are available or knowledge base articles, they will appear in this menu.
- View in Portal - Loads the selected knowledge base article in the portal. Viewing the article in the portal allows agents to see the layout of the article as portal visitors will see it.
- Delete - Deletes the selected article. For more information, see [Deleting Knowledge Base Articles](#) .

Tabs within an Article

Article information is organized within the following tabs:

- Content - The text of the knowledge base article.
- Comments - The internal comments made on the knowledge base article.
- Feedback - The feedback left by readers of the article.
- Broken Links - This lists any links contained within the the article that are "broken". That is, any links that return errors when they're clicked on, such as a 404 or "Not Found" error.
- Translations - The linked translations of the article.

Viewing Articles by Status

Occasionally, agents and administrators may want to view all articles that are marked as drafts or that need reviewed. To view articles by status, click the knowledge base icon , then select he desired status, such as Drafts, Review or Stale, from the navigation pane. All articles with the selected status will load in the content pane.

Viewing Articles by Brand

To view articles by brand, click the knowledge base icon , click on the Brand dropdown above the navigation pane and select the desired brand. All articles assigned to the selected brand will load in the content pane.

Viewing Deleted Articles

Deleted articles can be found using Advanced Search . Here, you can search only deleted items based on a few key words and potentially find the deleted article.

Deleting Knowledge Base Articles

On occasion, an agent or administrator may need to delete a knowledge base article from the system.

Note: The ability to delete a knowledge base article is determined by the role permissions. By default, agents cannot delete knowledge base articles. For more information, see Roles .

To delete a knowledge base article, simply select the desired article(s) in the content pane. Then click Delete in the content pane toolbar. Alternatively, agents can delete an article they are currently viewing by clicking Delete in the preview pane toolbar. Regardless of the method used, when an agent deletes a knowledge base article they are presented with a confirmation dialog. Once an article is deleted, it is no longer available for review or action and will eventually be purged from the system.

Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

Searching Knowledge Base Articles

There are two methods an agent can use to search for an article: basic search or advanced search. Both KB search methods support using "+keyword" to only show articles containing that keyword or "-keyword" to exclude articles containing that keyword.

Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the knowledge base section you are viewing (i.e. a specific folder, status, etc.) for matches and display the results in the content pane.

Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for an article. To perform an advanced search, click the knowledge base icon . Then click Advanced Search in the navigation pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

The following fields are available:

- Search String - Type the specific keywords to be queried.
- Folder - To search by folder, select the appropriate folder from the list.
- Brand Name - To search by brand, select the appropriate brand from the list.
- Flags - To search by article status (drafts, stale, private, etc.), select the appropriate status from the list.
- Creation Date - To search by article creation date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Date Modified - To search by a date range during which articles were edited, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Last Review Date - To search by review date, enter the start and end dates in these fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Moderating Knowledge Base Feedback

Knowledge base feedback can be a useful tool for companies that want to promote community on their portal and gather feedback on the content of an article. Article feedback can include helpful tips, questions about steps outlined in an article, suggestions for improving articles and more.

To eliminate spammy feedback left on articles, administrators may choose to moderate a user's feedback prior to it being published to the article. When moderation of feedback is enabled and a portal visitor leaves feedback on an article, their feedback is not immediately visible to the public. Until a moderator approves it, the comment is only visible to the user who created it. If this setting is enabled in a brand's Permissions settings , agents and administrators can review feedback left on articles and even reply to the user or delete the comment.

Knowledge base moderation can take place in the management interface or at the portal. To view unapproved feedback, click on the Knowledge Base icon . Then click on Moderation in the navigation pane. A list of articles with unapproved feedback will load in the content pane.

To moderate specific user feedback, click on the article's Feedback tab. The item will display in a pop-up window and the following options will be available in the preview pane toolbar:

- Edit - Modifies the feedback.
- Open KB Article - Loads the knowledge base article in a popup window.
- Approve - Approves the selected feedback. Approving feedback makes it visible to the public.
- Block - Blocks the selected feedback. When feedback is blocked, it will not be visible to the public. In addition, the portal visitor will be blacklisted from providing any future feedback on articles.
- Delete - Deletes the feedback.
- Close - Closes the feedback without performing any other action on it.

Reviewing Feedback Flagged as Abusive

When a portal visitor flags customer feedback as abusive, that feedback is no longer visible to the portal visitor. To view abusive feedback, click the knowledge base icon , expand Moderation in the navigation pane and click on the Abuse tab. A list of feedback flagged as abusive will display in the content pane. Just as they do with unapproved feedback, moderators have the ability to approve, edit or block customer feedback flagged as abusive.

Viewing Blocked Feedback

When a moderator blocks feedback, it is no longer visible to anyone in the portal. However, moderators can view any blocked feedback by clicking the knowledge base icon , expanding

Moderation in the navigation pane and clicking on the Blocked tab. A list of blocked feedback will display in the content pane. Just as they do with unapproved feedback, moderators have the ability to approve or edit feedback that is blocked.

Note: Moderators can sort blocked feedback to identify portal visitors that are continually posting offensive, spammy or off-topic feedback and use that information to block the offending IP address from providing feedback in the future.