



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 contact with the company's staff.

To access the knowledge base, click the knowledge base icon . All of the knowledge base articles for the default brand will load in the content pane.

For help understanding the different areas of the knowledge base section, see the knowledge base diagram .

Navigating the Knowledge Base

In general, the following columns are available in the content pane:

- Checkbox - Use these boxes to select multiple articles. Articles must be selected before choosing an action from the toolbar.
- Article Title - The title of the article.
- Status - The status of the article (private, public, draft, etc.).

Performing Knowledge Base Actions

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

- New - Click this button and select the appropriate option to create a new ticket, call log, task, instant message, canned reply, news item or knowledge base article.
- Actions - Click this button and select the appropriate option to add, edit or delete folders to the knowledge base.
- Add Folder - Creates a new knowledge base folder.
- Edit Folder - Modifies an existing knowledge base folder.
- Delete Folder - Deletes an existing knowledge base folder and all of its contents.

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

- New - Creates a new knowledge base article in the selected folder.
- 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.
- 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 system administrators and agents.
- Draft - Marks the article as a draft. Drafts are only visible to system administrators and agents.
- Reviewed - Marks the article as reviewed. 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: By default, articles become stale every 90 days. This is to ensure content is reviewed for accuracy on a regular basis.
- Needs 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.
- View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed in the content pane.
- Refresh - Refreshes the page.
- Visible Fields - Choose which columns are displayed in the content pane.
- Delete - Deletes the selected knowledge base articles. For more information, see [Deleting Knowledge Base Articles](#) .

Creating New Knowledge Base Articles

To create a new knowledge base article, click New in the navigation pane toolbar and then click Knowledge Base Article This will open a new article window that the agent will use to create the article.

The new article window contains tabs for options, details and translations, plus the compose tab, which the agent will use to write the article.

The following fields will appear in the header of the new article window:

- Title - Type the title of the article in this field.
- Folder - To specify the folder in which this article should appear, select the appropriate folder from the list.
- Summary - Type a brief summary of the article in this field.
- Status - To specify the status of the article, select the appropriate checkbox(es). For more information, see Knowledge Base Overview

Type the text of the article in the large editing box below the article header. Agents can change the formatting using the WYSIWYG editor.

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.
- Keywords - To specify related keywords that are not included in the content of the article, type the keywords in this field. Specifying related keywords can increase the accuracy of search results. Note: Keywords do not have to be separated with any type of punctuation.

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

- Save - Saves the contents of the article.
- Link Item - Links a translation of the article to the current article. Note: This option is only visible when viewing the translations tab.
- Unlink Item - Unlinks the selected translation(s) of the article from the current article. Note: This option is only visible when viewing the translations tab.

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:

- 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.
- Edit - Edits the selected article.
- 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.
- Details - This tab includes all information pertaining to the article, including creation date, modified date, and the number of unique views and hits.
- Translations - The linked translations of the article.

Viewing Articles by Status

Occasionally, agents and system 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 , expand By Status in the navigation pane and select the desired status. 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 , expand By Brand in the navigation pane and select the desired brand. All articles assigned to the selected brand will load in the content pane.

Viewing Deleted Articles

To view deleted articles, click the knowledge base icon and click Deleted Items in the navigation pane. All deleted articles will load in the content pane. For more information, see [Deleting Knowledge Base Articles](#) .

Deleting Knowledge Base Articles

On occasion, an agent or system 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.

When an article is deleted, it will be moved to the Deleted Items area of the knowledge base section. To view deleted articles, click Deleted Items in the navigation pane. A list of deleted articles will load in the content pane. For information on any of the available options, see [Knowledge Base Overview](#) .

Undeleting Articles

Didn't mean to delete an article? Agents can retrieve deleted articles from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired article(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your system administrator can permanently remove the articles in Deleted Items at any time without warning, so don't delete articles if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted articles.

Search for 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.

The following fields are available:

- Search String - Type the specific keywords to be queried. Date Range - To specify the length of time the search encompasses, enter the start and end dates in these fields or click the calendars and select the appropriate dates. --%>
- 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.
- Status - 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.
- Last Modified Date - 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.

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.

By default, SmarterTrack includes a sample folder containing a sample knowledge base article. The sample folder and article are provided as placeholders and can be deleted or modified at any time.

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.
- Mark As Private - Check this box to limit access to the folder and its contents to system administrators and agents only.
- 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.

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.