

Updating Knowledge Articles in CRM

This guide has been created to outline how you can search, create or update a knowledge article in Dynamics CRM

1.0 Searching for a knowledge article

There are 2 ways that you can search for a knowledge article in Dynamics CRM.

1.1 Search via the 'knowledge search' menu

1. The first option is you can use the knowledge search function in the Nav menu.



2. Selecting this option will give you a search bar and it's just a matter of typing in the subject that you'd like to search for e.g. 'Credit' in the search bar.

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d to apply for this degree and any credit transfer will be dete	rmined on an individual basis.
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3. You will now be able to find all the articles that have the word 'credit' applicable to the article.

Note: This search is the recommended option as it will which look for the word 'credit' in all related knowledge articles.



1.2 Search via the 'knowledge articles' menu

1. The second option is searching via the knowledge articles menu.



- 2. Select Knowledge Articles in the Nav menu.
- 3. In the Quick find field (top right hand corner) type in 'credit' then hit "enter".



4. You should now find a list of articles that relate to your search.

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	٨	KA-05754	Credit for prior study	English	Publis	1	0	0	0.00		16/04/18 6:03 AM	24/04/18 2:16 AM	
	٨	KA-05781	How much credit can I get for previous study?	English	Publis	1	0	0	0.00	credit,transfer,entry,RPL,articulation	16/04/18 6:05 AM	16/04/18 6:07 AM	
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Note: The quick find function will only look for articles that have the word 'credit' in the title and is not as in depth as the knowledge search function which looks for the word 'credit' in the whole article.

2.0 Creating a Knowledge Article

This section details how you can create a knowledge article from an existing case. This is especially helpful when dealing with cases that are not normally handled or if there are learnings that can be derived from the interaction.

By default, any knowledge articles created will be accessible externally unless it has been flagged as internal only.

2.1 Creating a knowledge article from a case.

1. Go to and click **Cases** from the *Nav menu*.



2. Select the Case that you want to create the knowledge article for.

ļ	All Cases \vee						t	Edit columns
0	Case Title ~	Case Number ~	Origin ~	Owner ~	Customer ~	Area ~	Status Reason ~	Status ~
	Test for creating knowledge article	CAS-46908-L3T6Q6	Web	Yungkurrinthi	Philip Tan	Yungkurrint	Assigned	Active
	this is test case	CAS-46907-K9J5P7	Web	💏 Philip Tan (Available)	Manu Manuel Staff	Yungkurrint	Has New Inform	Active

Knowledge Articles



3. Once you have selected the case in question, Click on **Convert to** (in the Action menu) and select **to Knowledge Article**

₽ Process ∨	🗄 Convert To 🛛 🗠	Run Repor

4. A pop-up will appear. Fill out the **Title**, **content**, **owner** and apply a **subject** (if required) otherwise you can leave it as Default subject. For the option "**open the new knowledge article**", choose **Yes** otherwise **No** (default) will populate.

Specify the details	of the	new knowledge article.
Title	*	Test for creating knowledge article #1
Content		Test for creating knowledge article #1
Owner	*	ትድ Yungkurrinthi
Subject		Default Subject
Open the new knowledge article		No

- 5. Click on **Convert**.
- 6. Note: only authorised users with the correct permissions can create knowledge articles. If you don't have the correct permissions, you'll encounter an error as such:

() Business Process Error	×
Principal user (Id=9f45d705-ab1b-ee11-8f6c- 000d3a7948ab, type=8, roleCount=3, privilegeCount=443, accessMode=0,	I
Show Details	
	OK
	ОК



7. The knowledge article will now open (if you have the correct permissions). Below is a map for editing/creating knowledge articles.

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Action menu	Conternation (Conternational Conternation (Conternational Conternational Conternatio Conternational Conternational Conternational Conternational Conte	mmorvenion A Associate Category Approve B Publish I Iff Share 1 0 English - Strated States Proposed	
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Figure 1: Menu map for knowledge article creation

- 8. Fill in any additional information for the knowledge article:
- 9. **Keywords** Add any additional details to the knowledge article to make it easier to search for. Separate keywords with a ;
- 10. **Description** Add a more in depth description for the knowledge article.
- 11. **Content** If there are any other details relating to the case or article.
- 12. Notes You can also add notes with attachments.

Definition	Details
Major Version	This is the major version of an article e.g., Main Heading (1.x)
Minor Version	Minor version of an article e.g., Subheading (x.1)

13. Once completed, in the version control and status menu, click on the chevron.

Venter Monter	English - U	Inited States	Proposed	^
A Major Version		1		
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Status Reason		Proposed		\sim
		Proposed		
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41 AM		In review		

- 14. Pop up will now appear and click on Status Reason.
- 15. Select from the list proposed, draft, needs review or in review.
- 16. By default, Dynamics CRM will make any knowledge article available to both external and internal users. If you need to change this to only internal follow the following steps:
- 17. In the action menu, click on the ellipsis.



Knowledge Articles



18. A list of options will pop up.

gory	Publish	日 Archive	:
🕅 S	end to Trash		
🖄 R	evert to Draft		
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🕞 R	elate Article		
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tol R	un Report		>

- 19. Select "Mark Internal".
- 20. System will now ask you if you want to mark all related versions and translations as internal.



- 21. Select from "This version only" or "All versions and translations."
- 22. Once you have made your choice, click Submit.
- 23. If you don't need to have the article reviewed, click on Approve in the Action menu.

sociate Category	✓ Approve	Publish

24. You'll now receive a confirmation for approval of article.

Confirm approval of article(s)	×
Are you sure you want to approve this version of the ar	ticle?
ОК	Cancel
	Cancer

25. Click OK.



26. Once the article has been approved, you'll notice that the status will now be changed to "**Published**" in the *version control and status menu*.

Published	\sim
Status Reason	

27. Once the status has been published, click on the **Settings** tab.

me		Test for creating knowledge article #1.1 - Saved				
ent:	~	Knowledge Article · Portal KnowledgeArticle ·				
ned	\sim	CONTENT	SETTINGS	ANALYTICS	Related ~	
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28. In the Associated information Section

Subject	Default Subject			
Publish On	27/10/23		8:00 AM	C
Evolution Date	31/12/23		8:00 AM	C

- 29. Set the date and time for Publish on
- 30. Set the date and time for Expiration Date

Note: By specifying the publish on date and expiration date would ensure that the article can be found through the Knowledge Search function.

2.2 Creating a knowledge article New or New from template.

- The only difference between creating new/new from template and converting a case into a knowledge article is that the Title, description and some content has already been prepopulated.
- 2. Click on Knowledge Articles in Nav menu.



3. In the Action menu, click New or +New from Template.



Knowledge Articles



- 4. Complete the following fields:
- 5. Title What do you want your knowledge article to be called?
- 6. Keywords Enter keywords to enable ease of search
- 7. Description Detailed description of the knowledge article.
- 8. Content Details, Outline, steps, process or what the article is all about.

← 🗗 🗟 Save	📓 Save & Close	+ New + New From Template	🔊 Flow 🗸				
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9. Follow step 13 onwards from 2.1 Creating a knowledge article from a case.