

## 5.3 Knowledge Base

### Bright Pattern Documentation

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# Knowledge Base Tutorials

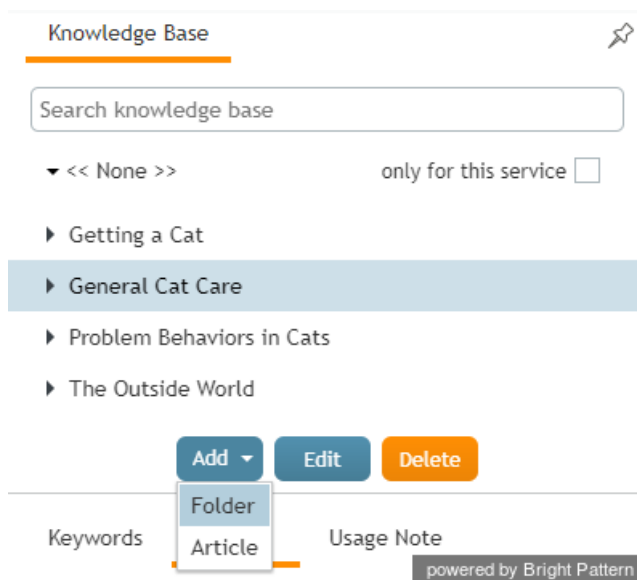
Knowledge Base is a collection of articles curated by your contact center. These articles address agent training, templates, preapproved replies to customer queries, email message templates, policy information, and much more. You can use Knowledge Base to find answers to customer inquiries, improve response times, and provide consistent replies to customers during service interactions.

## Articles

- [How to Contribute Content to the Knowledge Base](#)
- [How to Use a Knowledge Base Article](#)

## How to Contribute Content to the Knowledge Base

Depending on your qualifications, you may be able to edit existing articles in the *Knowledge Base* and add new articles to it. If you are authorized to contribute content to the Knowledge Base, you will see editing controls when you click the *Knowledge* tab.



### Knowledge Base with editing controls

To edit or delete an existing article, select it from the list above and click the **Edit** or **Delete** button respectively. To add a new article or folder, click the **Add** button and select the type of item you wish to create.

If you are adding a folder, in the dialog window that appears select the *Parent Folder* for the folder that you are creating (leave the field blank to create your folder in the root folder), and enter the name of the folder. The name should be unique within the parent folder.

If you are creating or editing an article, define or edit its properties in the dialog window that appears. Most of this properties are explained in section [How to Use a Knowledge Base Article](#).

Create Knowledge Base Article
✕

Title:

Answer:

**B** / **I** **U** **☰** **☰** **☰** **☰** **☰** **☰** **T<sub>x</sub>** **A** **↑** **↓**

Dear \${from.name},

Thank you for your email. My name is \$(user.firstName) \$(user.lastName). I have been assigned to handle your inquiry. Your case number is \$(case.number).

I will reply to your inquiry within the next two business days.

Best regards,  
\$(user.firstName)

Keywords:

Usage Note:

Parent Folder:

✕
Select

Language:

▼ English

Services:

[select](#)

Ok
Cancel

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Creating or editing a Knowledge Base article



Note the following:

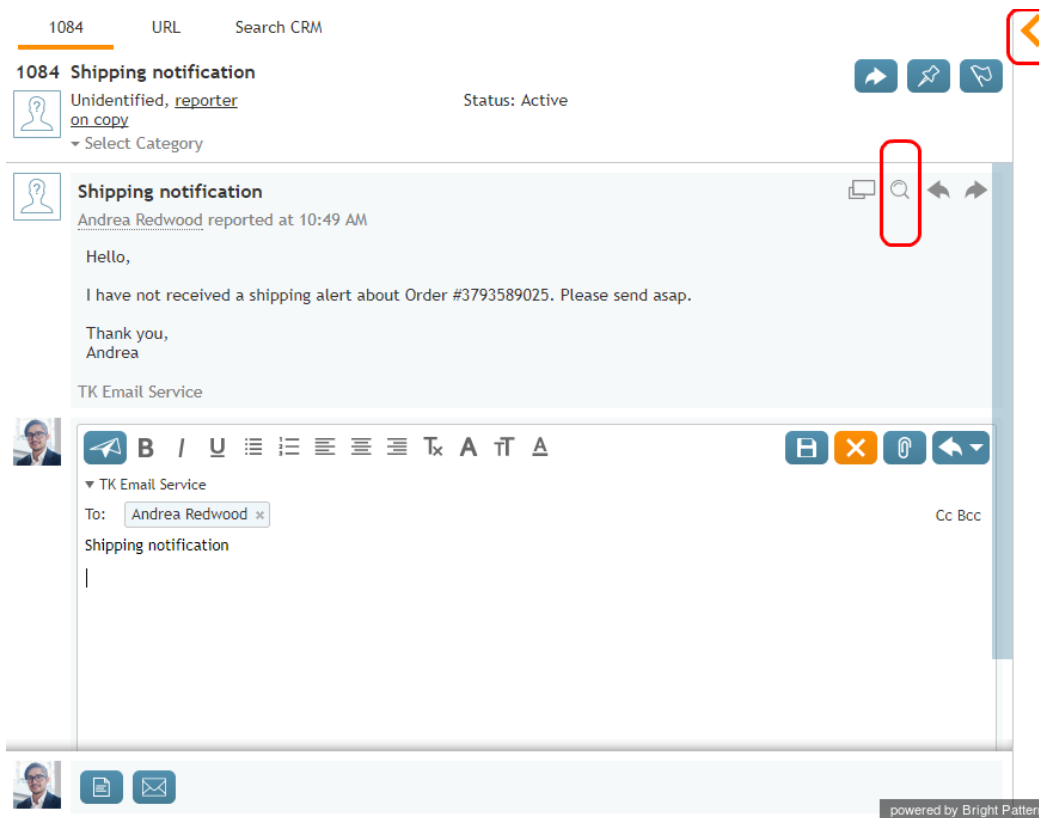
- The name of the article (the *Title* field) should be unique within the parent folder.
- To create the article in the root folder, leave the *Parent Folder* field blank.
- When assigning an article to a service, select the *Assign* checkbox. This association will be used to limit the article search by the service assigned to email interactions. You can assign an article to any number of services.
- If you select the *As default* checkbox, the *Answer* text of this article will be automatically inserted into draft reply to every email associated with the given service.
- You can use substitution fields in the *Answer* text. These fields will be replaced with data that the system will obtain from your working session and the email that you are replying to. The following substitution fields can

be used:

- $\$(user.firstName)$  – first name of the agent who will be using this article for reply
- $\$(user.lastName)$  – last name of the agent who will be using this article for reply
- $\$(from.name)$  – customer's name (the display name taken from the *From:* field of the email for which the given reply is composed); note that this name may not always be available
- $\$(from.emailAddress)$  – customer's email address (the email address taken from the *From:* field of the email for which the given reply is composed)
- $\$(case.number)$  – number of the case this email is related to
- $\$(app.emailAddress)$  – service email address (the email address taken from the *To:* field of the email for which the given reply is composed)
- $\$(cursor)$  – position of the input text cursor immediately after the article is inserted in the draft reply

## How to Use a Knowledge Base Article

There are several ways to access Knowledge Base and search articles. To use a Knowledge Base article in your message to the customer, either mouse over the customer's email in the Reply Editor and click the magnifying glass icon , or click the orange arrow  to expand the *Knowledge* tab.

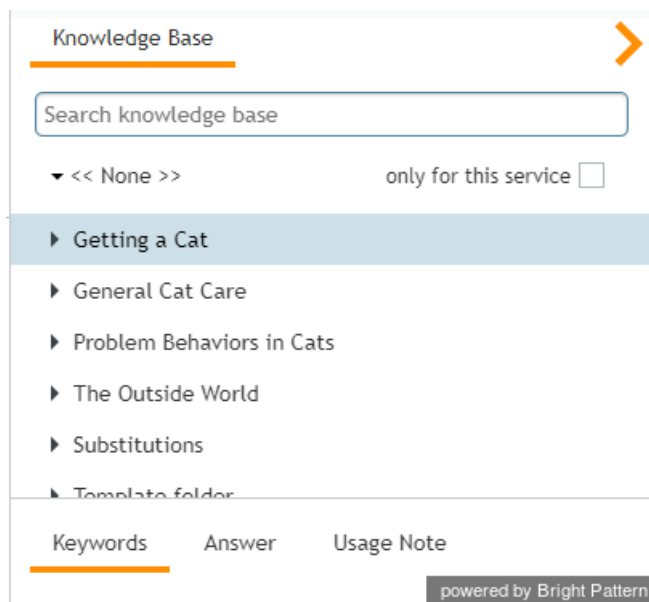


The screenshot displays a CRM interface with a customer email and a reply editor. At the top, there are search fields for '1084', 'URL', and 'Search CRM'. The email header shows '1084 Shipping notification' with a status of 'Active'. The email body contains a message from 'Andrea Redwood' reporting a missing shipping alert. Below the email is a reply editor with a rich text toolbar and a 'To:' field containing 'Andrea Redwood'. Two red boxes highlight specific UI elements: one around the magnifying glass icon in the email header, and another around the orange arrow icon in the top right corner of the interface.

Accessing Knowledge Base

The *Knowledge* tab shows you the contents of *Knowledge Base* and lets you browse the listed articles. Articles in the list may be arranged in folders and sub-folders reflecting the organization of knowledge in your contact center. Names of folders are shown with the Unfold/Fold icon next to them. To open a folder, click the **Unfold** icon. Names of articles do not have any icons next to them. Then click **Use** to place the selected text in your email draft to the customer.

Another way of finding an article you need is by using the search field. Type a word or phrase that this article is likely to contain in the search field. Use quotation marks for the exact phrase match. Matching articles will be listed below.



Knowledge Base folders, articles, search field and filters

By default, the contents of the entire Knowledge Base are displayed or searched. However, some articles may be pre-associated with services that your contact center provides. To see only the articles related to the service of the interaction you are handling, select the **only for this service** checkbox.

Note that an article may be assigned as a default reply for a particular service. In this case, the text of the article will automatically appear in the drafts for all emails associated with this service.

When you select an article, its entire contents will be displayed below in the *Notes Editor* space. The article content is shown in three tabs: Keywords, Answer, and Usage Note

The screenshot displays a CRM interface. On the left, an email is open, showing the sender 'TK Email Service' and the recipient 'cborden1111@gmail.com'. The subject is 'Re: Account test'. The email body contains text about finding a home for a cat. On the right, a 'Knowledge Base' panel is visible, showing a search bar and a list of articles. The selected article is 'Finding A Home for a Cat', which is displayed in a preview window below the list. The preview window shows the article's content, including a search bar and a 'Use' button.

Knowledge Base article

## Keywords Tab

The *Keywords* tab normally contains a statement of customer problem or question that this article will address. In a more general sense, this field can be used for any kind of information that will help you find the article using the search function (see above) and quickly assess relevance of the article to the email being handled. When you use the article as a template, the content of this tab will not appear in the email draft or chat text input field.

## Answer Tab

The *Answer* tab contains the answer to customer's problem or question. When you use the article as a template the entire content of this tab that will be inserted into the email draft or chat text input field. This part of the article may contain some substitution fields that will obtain data from your working session and the email that you are replying to (e.g., first and last name, case number, and customer's email address).

## Usage Note Tab

The *Usage Note* tab contains notes, comments, and suggestions regarding usage of this article. These notes may come from the author of the article and/or the agents who may have used it before. When you use the article as a template, the content of this tab will not appear in the email draft or chat text input field.

To use the article in your email or chat, click the **Use** button. The content of the *Answer* tab will be copied to your email draft in the *Reply Editor* or the text input field of your chat message. You can edit the text of the article as may be necessary to adapt it to your specific case before sending it.

**Note:** You can also initiate a search for information related to the content of the incoming email directly from the Reading Pane. For more information see section [How to Review an Incoming Email](#).

