fibreCRM

HEART OF THE PRACTICE

Visit **support.fibrecrm.com** for more info or contact your CRM Manager

Knowledge Base in CRM

1. If you have a how to documents, cheat sheets or information about processes on how to use your CRM then these can now be uploaded and viewed in the Knowledge Base module in CRM. To upload or view training material, first navigate to **All** in the **Navigation Menu** and select **Knowledge Base** in the drop down menu.
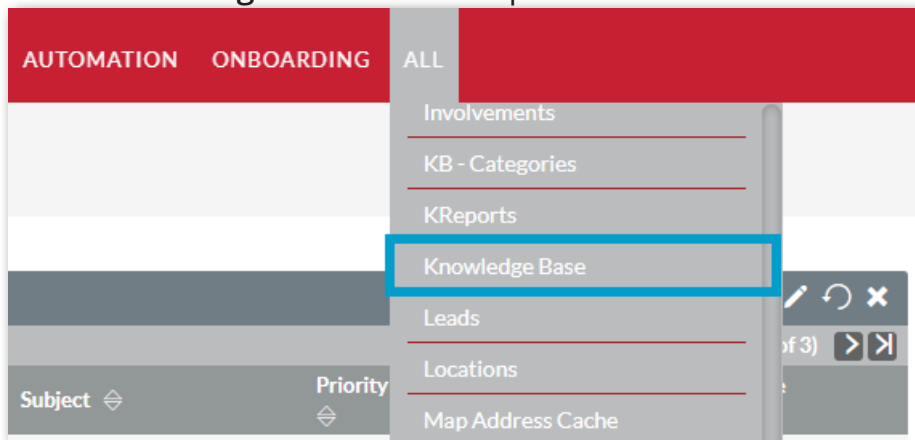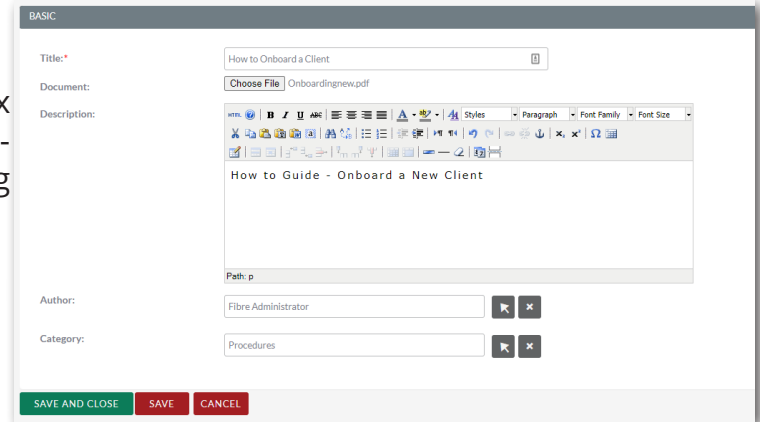
2. In the Knowledge Base module select **Create Knowledge Base** in options on the left hand side you'll be taken to the Create page.
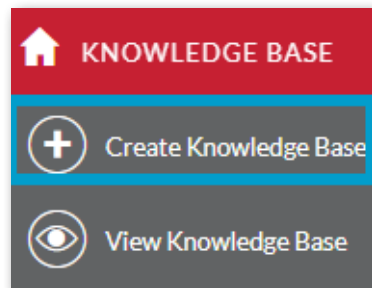
3. On the **Create** page you'll need to enter a title for the document. Below click **Choose File**, a pop up box will appear where you can select the file you would like to upload. In the **Description** box you can add a description about the training material. Or if you don't have a training document to upload you can type and format in the box so you have the option to add training processes without uploading a document. You can also use the **Select Arrows** to select an **Author** and assign a **Category**. Once done click **Save & Close** your new training content will now be able to view in the CRM Knowledge Base.

4. To view a training document go to the list view in the Knowledge Base and click on the name of the document you would like to view.
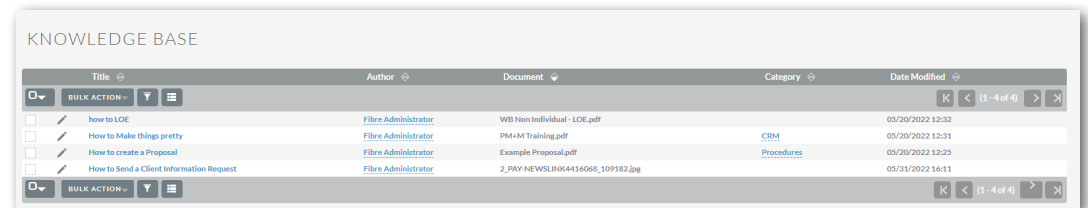
5. In the training document record you can view the **Title**, **Description**, **Author** and **Category**. In the **Document** section select the download icon to download the document to your desktop.