Microsoft Dynamics CRM 2016 Interactive Service Hub User Guide

Microsoft Dynamics CRM Online

Microsoft Dynamics CRM 2016 (on-premises)

Version 1.0

Microsoft Dynamics CRM

The new interactive experience for customer service

We bring to you a new intuitive and interactive experience for managing your customer service in the CRM interactive service hub. It's loaded with richer dashboards and redesigned forms that pull together key information so you can focus on what's more important and get things done faster.

Want to know more? Go through this article.

Get started

[Learn the basics]

Track your issues efficiently and act on them quickly

The redesigned forms in the interactive service hub include components that help customer service representatives quickly handle all their important stuff from a single place:

- The customer card in the forms gives a complete view of your customer's touch points
- The timeline gives a unified view of your customer's interactions across channels, and lets you act on them quickly
- The related pane lets you search and act on related records without losing context of customer data and interactions

You can manage only those record types that are enabled for use in the interactive service hub. These are the default record types: accounts, contacts, cases, activities, knowledge articles (new native CRM knowledge management), social profiles, and queue items. In addition to this, your system customizer can enable custom entities or activities for an interactive experience.

Create and manage a case with ease in the interactive service hub

Manage activities from the timeline

See and manage related records using the Related pane

Reduce call handling times with rich knowledge articles

The new knowledge management solution in CRM guides you through the process of creating rich articles in the interactive service hub, getting them reviewed, and publishing them. It also provides translation and versioning capabilities to support the knowledge lifecycle.

Knowledge management process in CRM

Create a knowledge article

Create and manage article versions

[Translate a knowledge article into multiple languages](#)
[Track knowledge article views](#)

Gain insights with dashboards

The new dashboards provide interactive chart-based visual filters, and offer users an all-in-one-place view of their workload through streams. These dashboards help CSRs effectively organize their time, focus on the issues at hand, and get more work done.

[Use interactive dashboards to effectively manage your work](#)

[Monitor knowledge articles with dashboards](#)

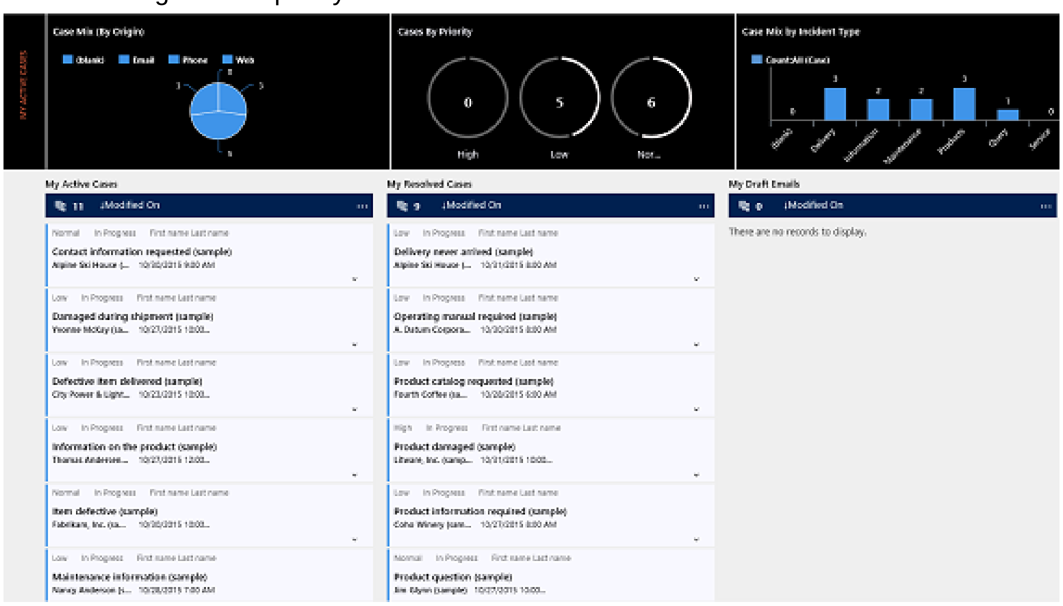
For admins and customizers

[Create and design interactive forms](#)

[Configure interactive dashboards](#)

User's guide for the new interactive service hub

The new interactive service hub is designed to simplify your day-to-day job, and is specifically optimized for customer service. It shows you all your vital information in one place, and lets you focus on things that require your attention.



Important

This feature was introduced in CRM Online 2016 Update and CRM 2016 (on-premises).

Interested in getting this feature? Find your CRM administrator or support person.

On this page:

Learn the Basics

The interactive service hub's intuitive interface unifies vital information in one place, and lets you focus on things that require your attention.

In this section:

Interactive service hub application requirements

Here's a list of operating systems and browsers that are supported by the interactive service hub:

- **Operating systems**. Windows 7, Windows 8, Windows 8.1, Windows 10
- **Browsers**. Microsoft Edge, Internet Explorer 10, Internet Explorer 11, Google Chrome, Mozilla Firefox

  Important
  Although you may be able to use Internet Explorer 8 or Internet Explorer 9, those web browsers are not recommended and are not supported with this version of the interactive service hub.

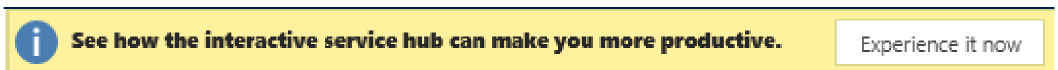
- **Screen resolution**. The interactive service hub requires at least a 1024 x 768 effective browser resolution. The effective browser resolution is determined by the screen resolution, browser zoom, and the operating system's zoom percentage. If the browser is resized to a resolution lower than the minimum supported, some content will be cropped.

Important
Here's a list of things that the interactive service hub doesn't support:

- Clients. The interactive service hub is not supported on Microsoft Dynamics CRM for Outlook, Microsoft Dynamics CRM for phones, and tablets and touch devices.
- Right-to-left (RTL) languages: Hebrew and Arabic.
- Accessibility options. The interactive service hub doesn’t support third-party accessibility aids, such as screen readers, and other accessibility features such as use of a keyboard to navigate through the user interface and complete actions.

Access the interactive service hub

There are two ways for you to open the interactive service hub. You can either click **Experience it now** in the notification bar as shown here.

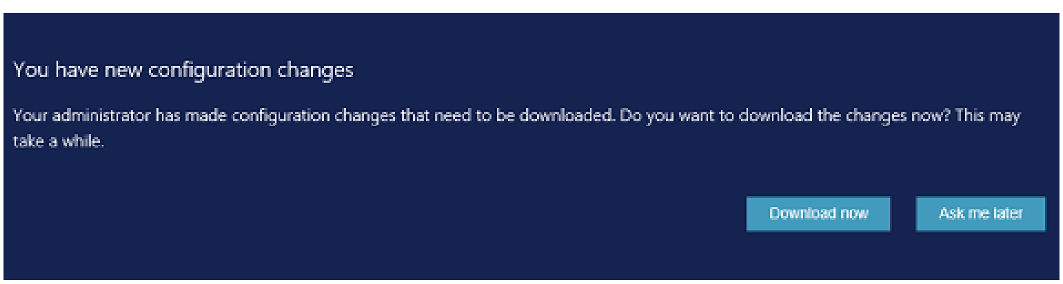


Or, you can directly access it by entering a URL in your browser. The URL is different depending on whether you’re using CRM Online or CRM (on-premises) as follows:

- **Microsoft Dynamics CRM (on-premises)**: In your browser, type *<your CRM Server>*/*<orgname>*/engagementhub.aspx, and then press Enter. For Internet-facing deployments use https://< *hostname[:port]>/engagementhub.apsx*.

  If more than one organization is available, and you don’t specify one, the default organization will be used.
- **Microsoft Dynamics CRM Online users**: Type https://*<CRM Server>*. *crm#.dynamics.com/engagementhub.aspx*, and press Enter.

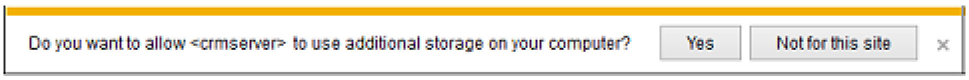
Any time your administrator makes configuration changes and you reload the interactive service hub, you’ll be prompted to download the metadata configuration. After you click **Download now**, it may take some time to load. If you click **Ask me later**, no changes (customization changes done in the CRM web application) will be downloaded, and you can continue to use the app without them.



To learn about the network requirements for using the Microsoft Dynamics CRM interactive service hub, see [Web application requirements for Microsoft Dynamics CRM](#).

Important

- You can’t access the interactive service hub using private browsing.
- If you’re using Internet Explorer, and you see a message asking for additional storage on your local computer, click **Yes**. If you click **Not for this site**, the interactive service hub application won’t load.



- If the interactive service hub still fails to load, please talk to your system administrator.

Manage different record types

In the interactive service hub, you can work with record types that are enabled for the interactive experience. By default, the following record types, which you’ll most commonly use to manage your customer service, are enabled:

- Accounts
- Contacts
- Cases
- Activities: Email, Task, Appointment, Phone Call, Social Activity
- Queue items
- Dashboards
- Social profiles

You can also see interactive dashboards in the interactive service hub.

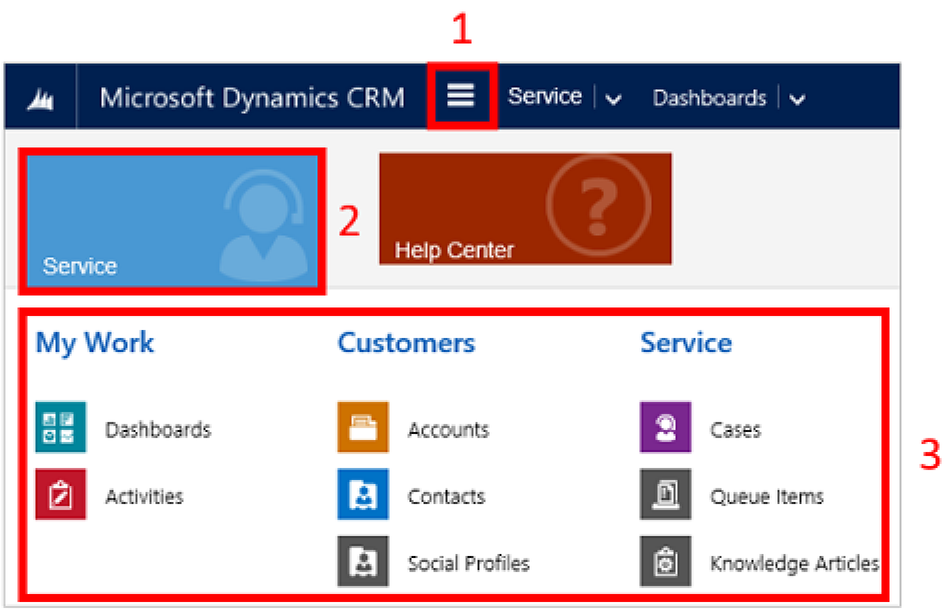
Any record types that are enabled for mobile are also available for use in the interactive service hub. However, these records are read-only. For example, the entitlements are enabled for mobile, so you can see the entitlements data in the case form, but you can’t create or edit an entitlement in the interactive service hub.

Note

- Your customizer can enable other custom entities and custom activities for the interactive experience.
- The navigation bar for the interactive service hub is different than the navigation bar in the CRM web application. Any changes to the representations of the other navigation bars aren’t reflected in the interactive service hub. For more details, contact your customizer.
- The navigation bar in the interactive service hub doesn’t support the global Search box and the Settings menu.

Navigate to a record

1. On the Main Menu, click a work area, and then click an item.



   You'll see only the record types that are enabled for the interactive experience in the navigation bar of the interactive service hub.

   When you click an item, you'll see the list of records. You can search for records in the list using the **Search for Records** box.

   Note
   The search only looks for the keywords in the primary field of the record type.

2. From the list of records, click the record you want.

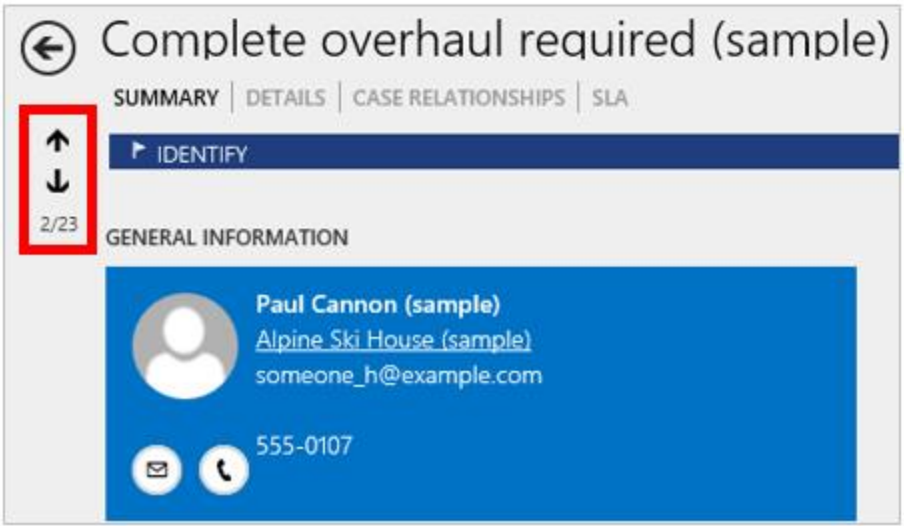
Switch to the record type dashboard from the list of records

When you're in the list of records of a specific record type, use the **Switch to Dashboard** button to switch to the default dashboard for that entity.

More information: [Use interactive dashboards to effectively manage service cases]()

Navigate through records and pages

- When you're in a record, use the **Next Record** and **Previous Record** buttons to see the next or previous records in the record set. A record set is the total number of records on a single page. For example, if you have 50 total records, by default, you'll see 25 records on the first page, and 25 on the second page. When you open a record from the first page, you'll be able to move between these 25 records by using the **Next Record** and **Previous Records** buttons.



- To go the previous page in the interactive service hub, click the **Back** button before the title of the record.

Note
Your browser's **Back** button will take you to the previously visited website.

See recent items

There are two ways you can see the items you've recently worked on.

- On the Main Menu, click the down arrow next to the record type, for example, next to Cases to show the recently used records.

- On the Main Menu, click the **Recently Viewed Items** button to see recently viewed records and views.

Create new records or find existing ones

1. To create records quickly by filling in only the most basic information, on the nav bar, click the **Quick Create** button .

2. To find all of your records from multiple record types quickly, click the **Search** button . To filter results by one record type, click a record type from the filter drop-down list next to the **Search** box.

> **Note**
> You can only search for record types that are enabled for the interactive experience.

Know your new forms

See how the different components of the new form help you quickly handle all your important tasks and actions from a single place.

Business processes

In the interactive service hub, the case and knowledge article forms have a process bar, which is collapsed by default. When you click a process stage, it opens as a flyout showing relevant steps for that stage. A flag on a stage indicates the stage you're currently on. When you click an active stage, you can see the **Next Stage** button move to the next stage in the process.

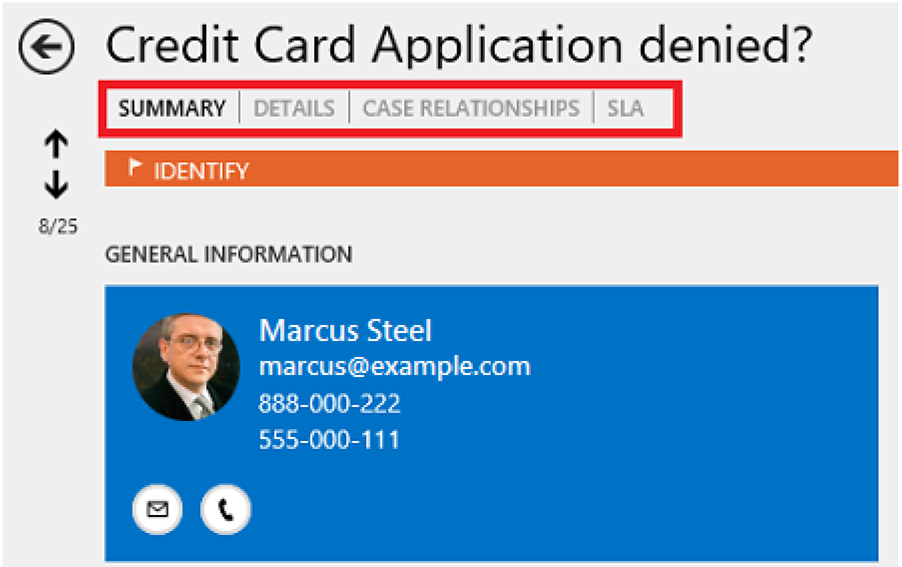
If there is more than one process to use, you can switch between the processes by clicking **More** > **Switch Process** on the command bar, and then selecting the process you want to use.

> **Important**
> Certain fields, like **Find Case** or **Similar Cases**, aren't available on the process bar of a case form in the interactive service hub.

Tabs

A tab is a group of sections on a page. Each Main form is composed of one or more tabs. By default, the **Summary** tab shows information about the customer, interactions with the customer, and other related records. You can click the different tabs to enter or see other miscellaneous details of a record.

Here's an example of how the tabs appear on the case form.



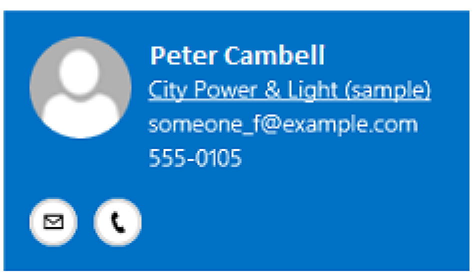
This table lists the default tabs for each record type that's enabled for the interactive experience.

Record type	Default tabs
Case	• Summary. Includes the customer card, interaction timeline, and the Related section. • Details. Tracks additional details and social response details of the case. • Case Relationships. Shows a Merged Cases and Child Cases list. You can add a new child case to the current case from the Child Cases list. It also shows a list of knowledge articles associated with the case. • SLA. Shows the related SLA KPI Instance records that are created for each SLA KPI that is tracked for the case.
Account	• Summary. Includes the customer card, interaction timeline, and the Related section. • Details. Tracks additional details like company profile, marketing details, contact preferences, and billing and shipping.

Record type	Default tabs
Contact	• Summary. Includes the customer card, interaction timeline, and the Related section. • Details. Tracks additional details like personal information, marketing details, contact preferences, and billing and shipping.
Activities	Activity forms don't have tabs. The form shows general information and details in different columns.
Knowledge Articles	• Content. Lets you create content for the article, and move it through to publishing. • Summary. Tracks basic settings, publishing settings, and related records. • Analytics. Shows the number of views, and a list of cases using the article.
Social Profile	Social Profile tab

Customer card

See a complete view of your customer's touch points in the customer card. This card is available in the **General Information** section of the **Summary** tab.



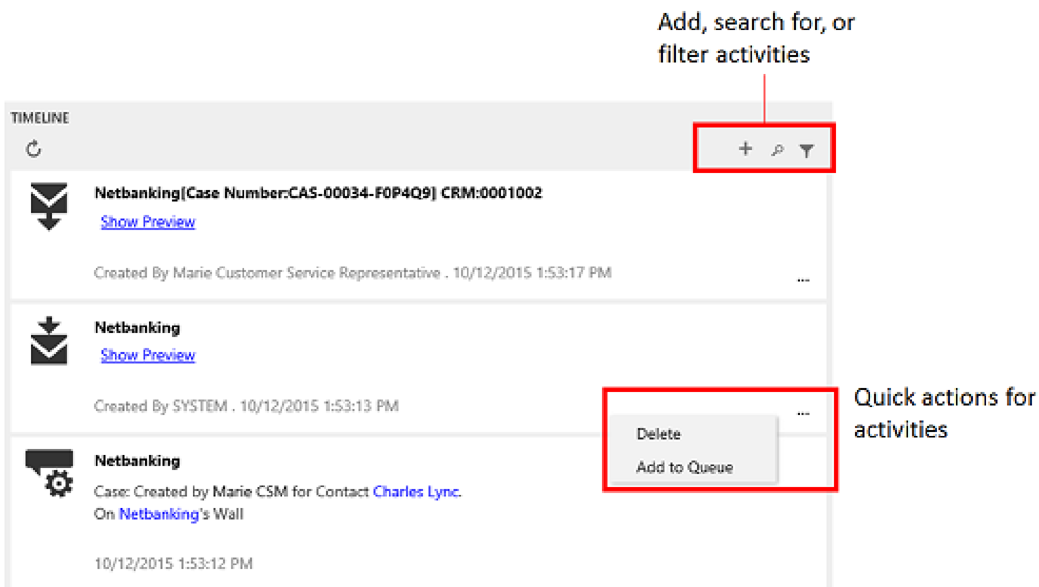
You can add a picture to the account or contact record in the CRM web application, and it will appear on this card.

For account records, the customer card shows contact details for the primary contact. For contact records, the customer card shows details of the account the contact belongs to.

Timeline

See a combined view of your customer's interactions across various channels, such as phone, email, or even social activities in the timeline. It also shows any related notes or system posts.

The timeline is available on the **Summary** tab of account, contact, and case records. For knowledge articles, the timeline appears on the **Content** tab.



Here are a few things you can do in the timeline:

- Filter the timeline for a specific activity type or find an activity by searching for a specific keyword.

  Search and filter work in combination or in isolation. For example, you can first filter the activities to just show emails, and then use the Search option to search for email messages with a specific keyword.
- Refresh the timeline so you can see the updated list of activities.
- Click the title of an activity to open the activity record.
- Take quick actions on an activity from the timeline, such as marking an activity complete, assigning it to others, adding it to a queue, converting it to a case, or deleting it. All actions that are available on a form command bar for any given record type are available here.

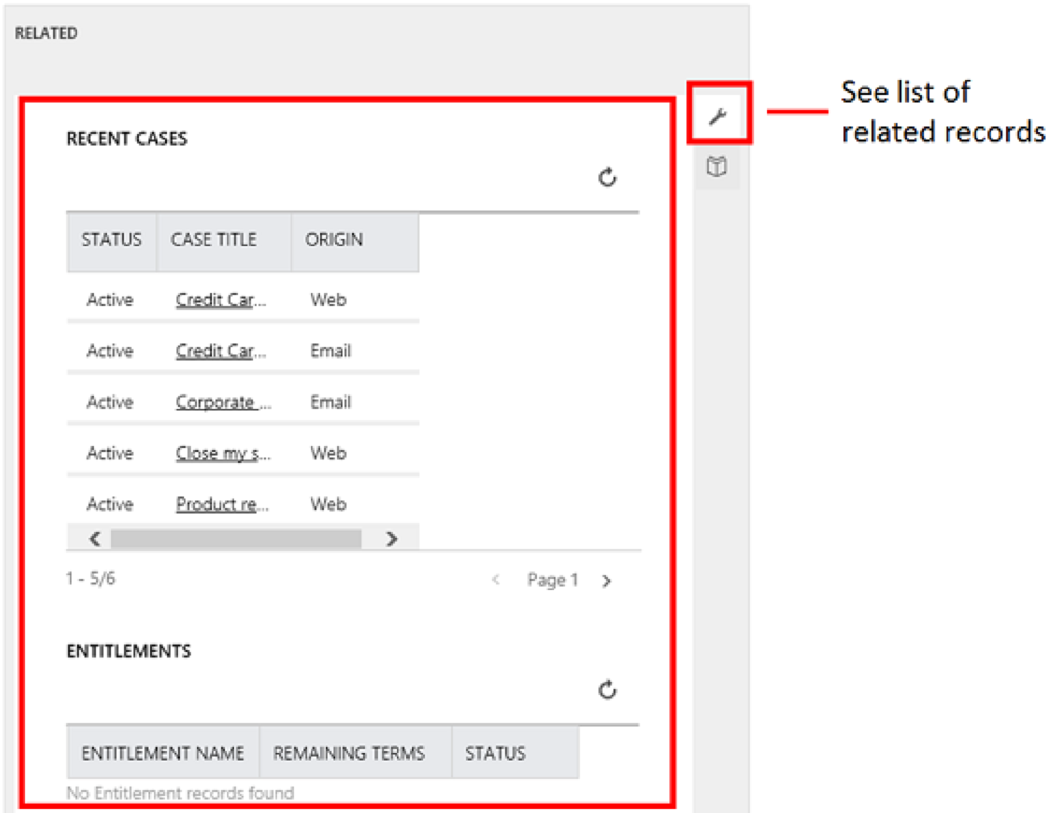
Related section

In the **Related** section (also called a reference panel), use the vertical tabs to see related records for the current record or search for knowledge articles. This section is enabled by default for account, contact, case, and knowledge article records. Your customizer can add this section for custom entities that are enabled for the interactive experience.

By default, the first tab in the Related section of a case record shows the recent cases and entitlements for the current case record you're working on. When you open a record from the list, it appears in a horizontal tab in the **Related** section.

Note

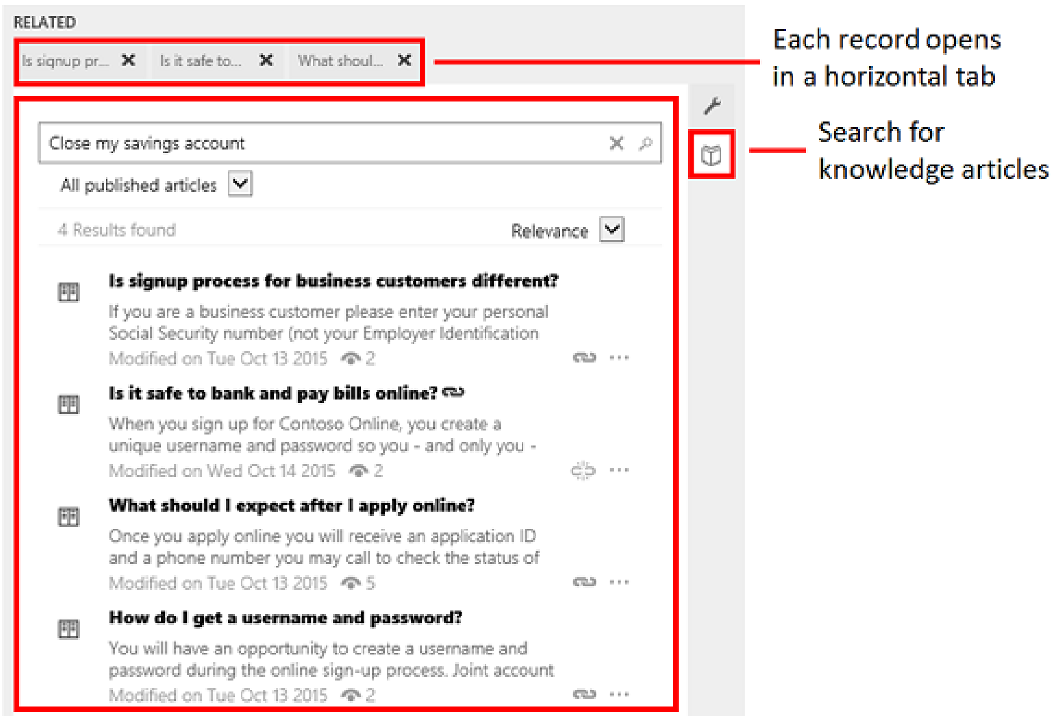
If you see data for any record type that isn't enabled for interactive experience, you won't be able to open or edit the record from the list. This is also the case for fields of type lookup, for example the entitlement field on the case form.



Note

For account and contact records, the **Related** section shows recent opportunities, recent cases, and active entitlements. For knowledge articles, this section shows related versions, related translations, related articles, and related products. Your system administrator or customizer can choose what related data to show in this section for each form.

The second tab in the **Related** section is the **Knowledge Articles Search** tab. This tab gives knowledge article suggestions based on the title of the record, and also lets you search for a knowledge article containing specific keywords. When you open a record from the list, it appears in a horizontal tab in the **Related** section.



For information on how to configure the interactive forms, see [TechNet: Create and design interactive forms]

Track your cases efficiently and act on them quickly

Creating and managing a case can't be any simpler. With the intuitive case form in the interactive service hub, you can do all your important tasks and actions without navigating to different parts of the application.

You can capture important information about customers, interactions you've had with them, and all related records of the current case in once single place.

In this section:

- Create a case
- Manage activities from the timeline
- See and manage related records in the Related section
- Resolve a case
- Cancel a case

Create a case

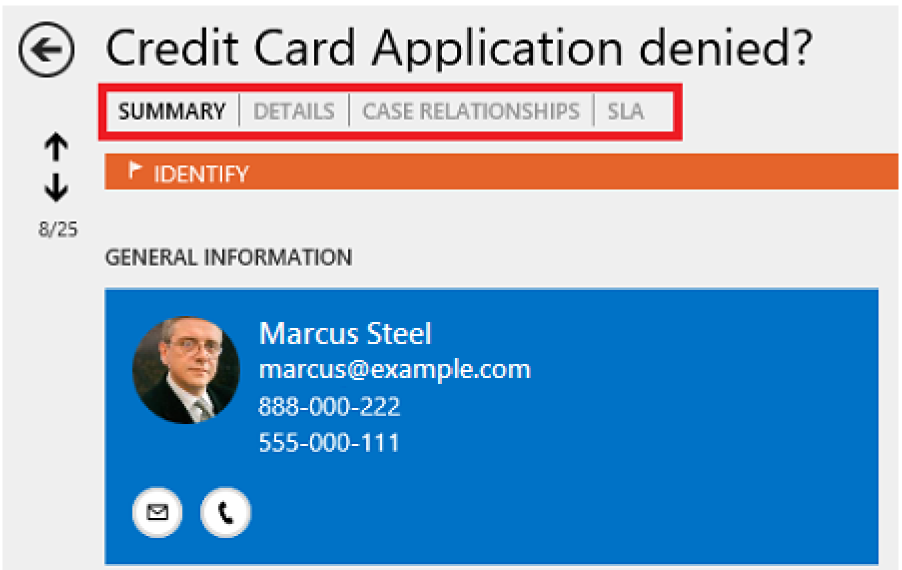
1. Make sure that you have the Customer Service Manager or Customer Service Representative role, or equivalent permissions.
2. In the interactive service hub, go to **Service** > **Cases**.
3. On the command bar, click **New**.
4. In the **Case Title** field, type a subject or descriptive name to identify the case.
5. Find the customer:
   a. Click the **Identify** area of the process bar.
   b. Click the **Find Customer** lookup button. By default, this field shows both account and contact records. Or, type a few letters and press **Enter** to search for records that contain the letters. After you select an existing customer and save the record, the **Customer Details** section (blue tile) will show the contact details, along with recent cases and activities for the customer in the Related and Timeline section.
   c. If a customer record doesn't exist, click **New** in the inline lookup results to create a new record.
6. Click the **Find Contact** lookup button, and then select an existing contact for the case or click **New** in the inline lookup results to create a new contact record.
7. In the **Subject** field, select a subject. Associating cases with subjects helps you search for cases with similar issues and find related articles. If you don't see the subject you want in the list, ask your system administrator to add it.
8. In the **Origin** field, select the channel through which this case was initiated.
9. In the **Product** field, select the product this case is about. You can't add a product family, a draft product, or a draft product bundle.
10. To see what kind of support you should provide the customer, click the **Entitlements** lookup button and select an active entitlement. The list shows all entitlements in CRM regardless of the customer you've selected for the case.

    Note

    - If you're on CRM Online 2015 Update 1, and your manager has set default entitlements for a customer in CRM, when a case is created or when a case is updated and the customer, contact, or product field has changed, a default entitlement is automatically associated with the case.

- When a case is created and an entitlement is applied to it (or when the case gets resolved), the entitlement terms from the associated entitlement are decremented. However, if you don't want the entitlement terms to be decremented for a case, on the command bar click **Do not decrement entitlement terms**.

11. Click on the other tabs to enter or see additional information about the case.



- The **Details** tab tracks additional details and social response details of the case.
- The **Case Relationships** tab shows a **Merged Cases** and **Child Cases** list. You can add an existing child case to the current case from the **Child Cases** list. If you want to create a new child case for the current case, on the command bar, click **Create Child Case**. You can't merge cases in the interactive service hub.

  The **Case Relationships** tab also shows a list of knowledge articles associated with the case.
- The **SLA** tab shows the related SLA KPI instance records for each SLA KPI that's tracked for the case.

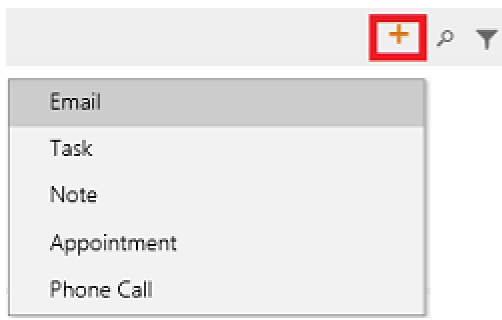
  Note
  The SLA timer for standard or enhanced SLA is not supported in the interactive service hub.

12. When you're done, click **Save**.

Manage activities from the timeline

Capture all interactions and communications you've had with your customer by adding them as activities in the Timeline section. The timeline section gives you a unified view of everything that's happening on a case, like email received, a follow-up task that you created, system posts that are automatically generated when the cases is created, or any notes you take while talking to the customer.

When you update an activity, it moves up in the Timeline because Timeline is sorted from latest to the oldest. This is the default and only order of sorting.

To	Do this	
Create a new activity	1. In the **Timeline** section, click **+**, and then select an activity type: Email, Task, Note, Appointment, or Phone Call.  2. Fill in your details in the activity form, and then click **Save**. **Tip** If you want to create an email activity, you can now use the new rich text editor in the interactive service hub, which has more formatting options than the one in the CRM web application. More information: [Use the rich text editor to create knowledge articles and emails]	
Search for a specific activity		

	In the **Timeline** section, click the **Show Search** button . 2. In the **Search for Records** box, type the word that you want to look for in the title and content of the activities.	
Filter activities	In the **Timeline** section, click the **Show Filters** button . 2. Click Till Date to filter the activities based on date filters. The available date filters are: To Date, Today, Yesterday, This Week, Last Week, This Month, Last Month, Month To Date, and Custom Time Frame. 3. Click **All Items** to filter activities based on the activity type.	
Take actions on an activity	In the **Timeline** section, click the **Quick Actions** button 2. Select the action you want to take. The list of quick actions you'll see for any activity is the same as the ones that are available for the activity at a form level (on the command bar). For example, for an email activity, you will see actions like Reply, Reply All, or Forward. Custom actions may also be available.	

See and manage related records in the Related section

The **Related** section in a case record provides you quick access to important information related to the primary case that would help you in solving the case.

See recent cases and entitlements

Click the **Recent Cases and Entitlement** tab to see:

- A list of recent cases for the customer associated with the current case.
- A list of entitlements for the customer associated with the current case.

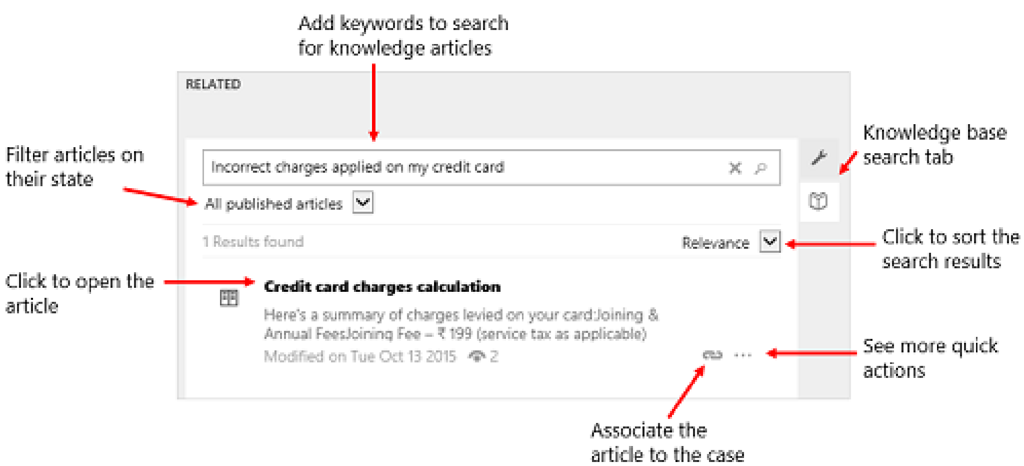
When you click a record in the list, it opens as a horizontal tab in the **Related** section.

Search for knowledge articles

The Knowledge Base Search tab lets you search for relevant knowledge articles to resolve a case. Click the **Knowledge Base Search** tab to see search results automatically populated based on a field your administrator configured in the Knowledge Base Search control properties. For a case, this is the title of the case record.

Important

The knowledge base search in the interactive service hub shows relevant knowledge articles only when your organization is set up to use the native CRM knowledge management capability. For more information, talk to your administrator.



- Type a different keyword to search for other knowledge articles. The following fields of a knowledge article are searched for the keywords that you type: Title, Content, Keywords, Description, and Article Public Number.
- To see knowledge articles in specific states, use the filters. You can filter search results to see all draft, published, or approved articles.
- To choose how you want to sort your search results, click **Relevance**. You can sort the knowledge articles on relevance, number of views, newest first, or oldest first.
- Click the article title to see its full content. The article opens as a horizontal tab in the **Related** section.

- To associate the knowledge article to the current case, click the **Link the KB Article** button. You can also dissociate the article from the case by choosing the **Unlink the knowledge article from the current record** button .
- To send an email with a link to the knowledge article on a portal, or the content of the knowledge article in an email, click the **Quick Actions** button , and then click **Email Link**. An email form

opens with the link to the article populated in the email body. The fields are automatically populated based on the case and customer details. Add other information as needed, and then on the command bar, click **Send**. If your administrator hasn't selected the **Use an external portal** check box in the **Embedded Knowledge Search** setup, the content of the article is copied to the email body instead of the link.

If the article is published, an external link is copied to the email body.

> **Note**
> This action is available only for Published and Expired articles.

- To copy the external URL of the article so you can share it with your customers over channels like chat or email, click the **Copy Link** button .

> **Note**
> This option is available only if your organization is using an external portal to publish the knowledge articles and your administrator has selected the **Use an external portal** check box in the **Embedded Knowledge Search** setup. If you use a browser other than Internet Explorer, this option isn't available.

Resolve a case

1. In the list of active cases, open the one you want to resolve.
2. On the command bar, click **Resolve case**.

   Make sure you close all the case activities. If there are open activities associated with the case, you'll see a message saying that the open activities will be canceled if you resolve this case. To continue, click **Confirm**.
3. In the **Resolve Case** dialog box, in the **Resolution Type** list, select how the case was resolved.
4. In the **Resolution** box, type a short explanation of the resolution.

   The total time spent on all activities for this case, as recorded in the **Duration** box in each activity, is filled out automatically in the **Total Time** box.
5. In the **Billable Time** list, enter the amount of time spent on the case to be billed to the customer.

   If this case is linked to an entitlement, the billable time will be subtracted from the allotted minutes for that entitlement.
6. Click **Resolve**.

Cancel a case

All case activities must be closed before you can cancel a case.

1. In the list of active cases, open the case you want to cancel, and then on the command bar, click **Cancel Case**.
2. In the **Confirm Cancellation** dialog box, select the case status:
   - **Canceled**: This means the case is canceled and it will no longer be assigned to you.
   - **Merged**: This means the case is merged with another case. When the case is merged, the case activities will be moved to the case it was merged with.
3. Click **Confirm**.

Reassign a case

If you don't have enough information to resolve a case, or if you think another member in your team has expertise on the subject, you can assign the case to another user or team.

1. In the list of cases, select the case that you want to reassign, and on the command bar, click **Assign**.
2. In the **Assign to Team or User** dialog box, in the **Assign To** field, select **User or Team**, and then in the **User or team** field, select who you want to assign the case to.
3. Click **Assign**.

Add a case to a queue

If you think another group in your team has expertise on the subject, you can move the case to a queue so that someone else can pick it up.

1. Go to **Service** > **Cases**. (How do I get there?)
2. In the list of cases, select the case that you want to add to a queue.
3. On the command bar, click **Add to Queue**.
4. In the **Queue** field, select the queue that you want to add the case to, and then click **Add**.

Save and route a case

To save a case record and route it to a queue in a single click, use the **Save & Route** button.

1. From the list of cases, open a case record.
2. Make the changes as required, and on the command bar, click **Save & Route**.
3. In the **Route Case** dialog box, click **Route**.

   The case is routed based on the active routing rule set.

   Important
   The Save & Route button is available only on active cases.

Reduce call handling times with knowledge articles

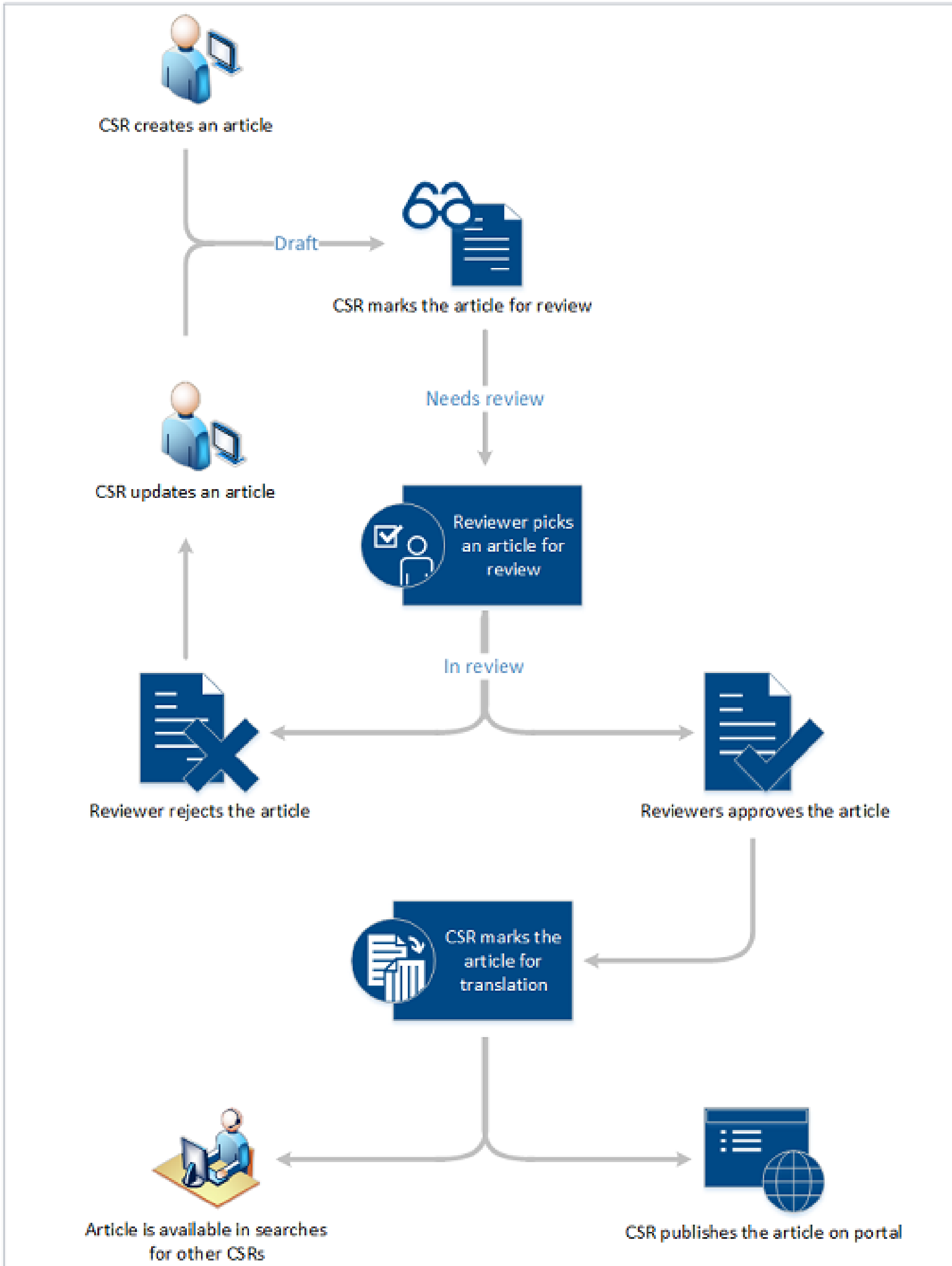
With the new CRM knowledge management solution, you can create and manage knowledge articles that your users may be looking for. Knowledge articles can include instructions about using your products or answers to questions customers frequently have. Use the rich text editor to format your content or embed videos and images.

Important
The ability to create and format knowledge articles with the rich text editor is available only in the interactive service hub. The articles that are created in the interactive service hub will be available in the CRM web application as read-only records.

In this section:

Knowledge management process

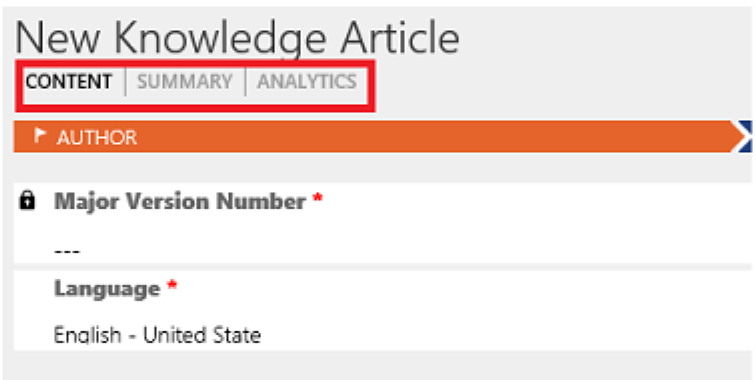
The following diagram describes the default process for creating and using knowledge articles in the interactive service hub.


CSR creates an article
Draft
CSR marks the article for review
Needs review
CSR updates an article
Reviewer picks an article for review
In review
Reviewer rejects the article
Reviewers approves the article
CSR marks the article for translation
Article is available in searches for other CSRs
CSR publishes the article on portal

Create a knowledge article

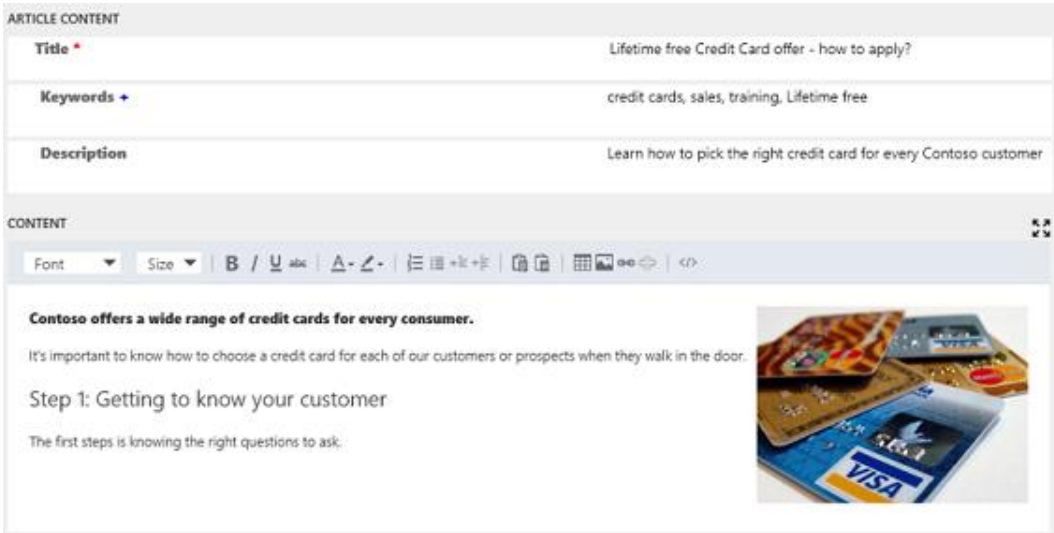
Turn your customer questions, issues, and feedback into knowledge articles, so other service reps can benefit from them. Add images and videos to your articles to explain things better and make the articles engaging.

1. Make sure that you have Create and Read permissions on the Knowledge Article entity. By default, these permissions are added to the Knowledge Manager, Customer Service Manager, or Customer Service Representative role.
2. In the interactive service hub, go to **Service** > **Knowledge Articles**.
3. On the command bar, click **New**.
   You'll be on the **Content** tab of the knowledge article.



4. In the **Article Content** section, fill in the following details:

   a. **Title.** Type a descriptive title that communicates the subject and purpose of the article in a concise manner.
   b. **Keywords.** Type keywords for the article. These keywords are used for searching the knowledge base for articles. Separate keywords with commas.
   c. **Description.** Type a short overview of the article. This appears in the search results and is used for search engine optimization.



5. In the **Content** section, add the content for your knowledge article.

   Note
   As soon as you click inside the editor space, the rich text editor command bar appears. Use the command bar options to format and style your content. More information: Use the rich text editor to create knowledge articles and emails

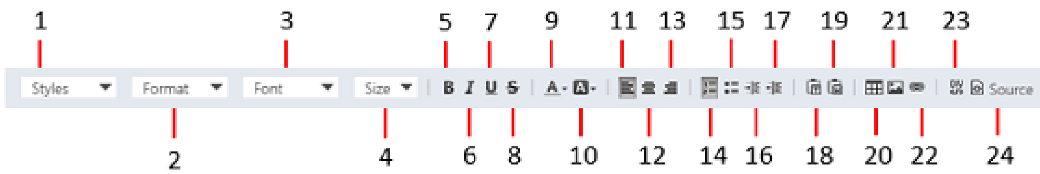
6. On the process bar, click **Author**.
7. In the **Article Subject** drop-down list, choose the subject of the article to help with article searches.
8. In the **Assign Primary Author** drop-down list, choose a person who is responsible for maintaining the article content. By default, the user who creates the article is the primary author.
9. When you're done adding the content, click **Save**.

   Posts about knowledge article-related activities will begin appearing in the **Timeline** section.

Use the rich text editor to create knowledge articles and emails

Create rich and well-formatted content for email or knowledge articles using the new rich text editor in the interactive service hub. The editor brings common word processor features like advanced styling, linking, find and replace, and insert images and tables.

You can choose a specific format or style for the content you're writing.



Command	Use
1. Formatting Styles	Apply predefined sets of formatting features to make it easier to keep the presentation of the text consistent. To make the choice easier, the style names are displayed in a style that they represent, giving you a preview of what the text will look like. **Note** This option is available in the expanded mode only.
2. Paragraph Format	Apply predefined block-level combinations of various formatting options. A paragraph format can only be applied to a block-level element, like a **paragraph** or a **div** element. **Note** This option is available in the expanded mode only.
3. Font Name	Choose a font for the selected text.
4. Font size	Choose a font size for the selected text.
5. Bold	Apply bold formatting to the selected text.
6. Italic	Apply italic formatting to the selected text.
7. Underline	Underline the selected text.
8. Strikethrough	Mark selected text for deletion.
9. Text Color	Choose a text color for the selected text.
10. Background Color	Choose a background color for the selected text.
11. Align Left	Left align the text. When you align your text left, the paragraph is aligned with the left margin and the text is ragged on the right side. **Note** This option is available in the expanded mode only.
12. Center	Center align the text. When you center align the text, the paragraph is aligned symmetrically

Command	**Use**
	along the vertical axis and the text is ragged on the both sides. **Note** This option is available in the expanded mode only.
13. Align Right	Right align the text. When you align your text right, the paragraph is aligned with the right margin and the text is ragged on the left side. **Note** This option is available in the expanded mode only.
14. Insert/Remove Numbered List	Create a numbered list.
15. Insert/Remove Bulleted List	Create a bulleted list.
16. Increase Indent	Increase the margin on the left side of text.
17. Decrease Indent	Decrease the margin on the left side of the text.
18. Paste as Plain Text	Paste the clipboard data as plain text, without the source formatting and styling.
19. Paste From Word	Paste content from Microsoft Office Word with the original content formatting. This will retain: • Spacing and line breaks • Ordered and unordered lists • Tables • Font styles and colors **Note** Images won't be copied from Word Microsoft Office Word.
20. Insert Table	Insert a table, and specify the table properties.
21. Image	Insert an image. 1. Choose Insert Image. 2. In the **Image Info** tab, specify the web address of the image, and also specify properties to define how the image will appear in the email or article.

Command	Use
	Note If the image is located on the external server, use the full absolute path. If the image is located on a local server, you can use a relative path. 3. If you want the image to be a clickable link, in the **Link** tab, add a URL for the image. You can also specify if you want the targeted page to open in a new window, topmost window, same window, or parent window. 4. To configure additional image options, use the **Advanced** tab. This is meant for advanced users with knowledge of HTML and CSS, and lets you change the presentation of the image. • **ID.** Type a unique identifier for an image element in the document (**id** attribute). • **Language Direction.** Choose the direction of the text. • **Language Code.** Type the language of the image element specified. • **Long Description URL.** Type the web address of an HTML page containing a longer description of the image. • **Stylesheet Classes.** Enter the class of the image element (class attribute). Note that an image element might be assigned more than one class. If this is the case, separate class names with spaces. • **Advisory Title.** Enter the text of the tooltip that is shown when the mouse cursor hovers over the image. • **Style.** Enter the CSS style definitions. Note that each value

Command	Use
	must end with a semicolon and individual properties should be separated with spaces.
22. Link	Add clickable hyperlinks or email addresses to your documents. In the **Link** dialog box choose the type of link you'd like to insert. The **Link Info** tab allows you to choose the link type as well as set the link protocol and URL. The **Target** tab is only available for the URL link type. It specifies the location where the link will open after you click it.
23. Create Div Container	Create a **div** container to apply formatting to a larger document fragment that extends beyond one block. The **General** tab lets you manually add a stylesheet class that is applied to the div element. The **Advanced** tab lets you configure additional **div** element options such as assigning it an ID, a language code, a text direction, an advisory title, or CSS style properties. **Note** This option is available in the expanded mode only.
24. Source	Open the HTML source code for the content. To embed videos and IFrames, **video** and **iframe** tags can be used in HTML source code mode.

Important
You can't use client-side code (script tags or JavaScript) in articles and emails. If you want to associate CSS or JavaScript, use web resources.

Mark a knowledge article for review

To make sure the content you've created is accurate, have someone review it.

You can mark an article for review or directly assign it to a specific person or queue. When you mark an article for review, it starts appearing in the knowledge manager's dashboard. The knowledge manager can then assign the article to specific team members or a queue for review.

1. In the article you want to mark for review, in the **Status Reason** drop-down list, click **Needs Review**.
2. On the process bar, click **Author**.
3. In the **Mark for Review** field, click **Mark Complete**.
4. To assign the knowledge article to another reviewer or team, on the command bar, click **Assign** and select the user or a team.
5. To add the article to a queue so reviewers can pick it from there, on the command bar, click **More** > **Add to Queue**, and then select the queue.

Review and reject or approve a knowledge article

It’s important to review articles for accuracy before they’re published or made available to others.

Important
To approve a knowledge article, you must have **Approve** permissions for the knowledge article record type. This permission is added by default to the Knowledge Manager, Customer Service Manager, Customer Service Representative, or System Administrator role or equivalent permissions.

To	Do this
Pick an article assigned to you	Go to **Service** > **My Knowledge Dashboard**, and then see the **My Active Articles** stream. **-OR-** In the interactive service hub, go to **Service** > **Queue Items**, and then select the **Items available to work on** view.
To suggest review feedback	1. On the process bar, in the **Review** stage, in the **Review** field, select **Reject**. 2. In the **Timeline** section, click **+**, and then click **Note** to add details about the changes you want in the knowledge article. The article is automatically assigned to the primary author of the knowledge article.

To	Do this
Approve the content of the article	When you approve the content of an article, it means that the content is ready to be consumed by other customer service reps, and also ready to be published. On the process bar, in the **Review** stage, in the **Review** field, select **Approve**. The article is automatically assigned to its primary author.

Update knowledge articles to capture feedback

Make sure that your articles are up to date and accurate at all times by updating them based on feedback you receive.

1. In the interactive service hub, go to **Service** > **Knowledge Articles**.
2. Click the article you want to edit.

   If the reviewer has suggested any changes from their review, you can see them in the Timeline section.
3. Update the article based on the feedback.
4. Click **Save**.
5. To assign the article back to the reviewer for approval or publishing, on the command bar, click **Assign**, and then select a user or a team

Update published knowledge articles

When a knowledge article is in the Published state, only the users who have the Publish privilege can update it.

1. In the interactive service hub, go to **Service** > **Knowledge Articles**.
2. Click the published article you want to edit.
3. On the command bar, click **Update**.
4. Update the article based on the feedback.
5. Click **Save**.

If the article has information that complements an existing knowledge article, associate the existing article with the current knowledge article.

1. In the knowledge article, on the command bar, click **More** > **Relate Article**.
2. In the **Select Article to Associate** field, click the **Lookup** button, select an existing article, and then, click **Associate**.

   The associated article appears in the **Related Articles** list in the **Related Information** section of the **Summary** tab.

Create and manage article versions

Article versioning helps you manage updates to your knowledge articles. By creating major and minor versions of a knowledge article, you can keep your articles up to date with the latest information while keeping track of changes throughout the lifecycle of your products and services.

This capability helps you to keep accurate records of the features your organization provides and go back to previous versions if you need to.

1. In the interactive service hub, click **Services** and choose **Knowledge Articles**.
2. Open the article you want to create a new version for.
3. In the knowledge article, click **Create Major Version** or **Create Minor Version**.

   An example of a major version would be when your documentation changes to detail a new feature or functionality, while a minor version might be a change to the user interface with no change to functionality.

   The new version of your article will contain all of the same content, information, and permissions as the current version. The **Version Major** or **Version Minor** field will automatically update to reflect the new version number.

   Note
   You won't able to make any changes to the **Major Version Number**, **Minor Version Number**, **Language**, or **Article Public Number** fields when creating a new major or minor version of an article.
4. After you have reviewed the article, make any changes that you want to the new version.

   You can update the article title, content, keywords, and description to reflect any changes to your products, features, or services.

Review and publish your new version

When you are done making changes, you can push the new version of your article through your standard article workflow. When you are finished reviewing and are ready to publish, on the command bar, click **More** > **Publish**, and then choose how and when you want to publish your new version. You can publish your new version immediately, schedule it to publish at a future date, or leave it as a draft to manually publish later. More information: Schedule or publish an article

Manage article versions

Managing your article versions means publishing and archiving different versions of each article to provide the most accurate information to your customers and internal employees. Keep in mind that only one version of an article can be published at a time; it's important to keep track of the changes that are made to each version and publish them when it is appropriate.

1. In the knowledge article, click the **Summary** tab.
2. In the **Related Information** section, click the **Related Versions** button to display a list of all major and minor versions of the article.
3. In the **Related versions** list, open the version you want to delete.
4. Click the **More** button, and then click **Send to Trash**.
5. When prompted, click **OK**.

   Deleting an article version is permanent and can't be undone. You won't be able to go back to that version of the article, so make sure that you don't need any of the information. It's a good idea to create a local backup of any versions you delete.

Translate a knowledge article in multiple languages

Your knowledge content needs to reach all of your customers, no matter what market or region they are from. The knowledge management capability in CRM helps you translate your articles so that you can provide the same self-help content in multiple languages without having to manage multiple copies of the same article. By using the translation feature, you can quickly and efficiently provide 24-hour service to all of your customers.

1. Open the article you want to translate, and on the command bar, click **Translate**.
2. In the **Create new translation** dialog box, in the **Pick a language** drop-down list, choose the language you want.
3. In the **Create new version** field, choose whether to create a new major or minor version for your translation.

   You can translate articles into any language that's supported by the interactive service hub.

4. Click **Create**.
5. Enter your translated text in the appropriate fields. You can enter translated text for the following fields:
   - Title
   - Keywords
   - Article Description
   - Content
6. When you are finished reviewing and are ready to publish, click **More** > **Publish**. Choose how and when you want to publish your new version. You can publish your new version immediately, schedule it to publish at a future date, or leave it as a draft to manually publish later. More information: Schedule or publish an article

Manage article translations

After you have published a translation for an article, you can manage it and any other translations by clicking the **Summary** tab of the knowledge article.

1. In the **Related Information** section, click **Related Translations**.
2. Open the translation you want to view. Keep in mind that there may be multiple versions for each language. You can sort the translations by clicking the column headers of the **Related Translations** section.

   From here, you can:
   - Edit or update a translation
   - Create a new major or minor version of a translation
   - Delete a translation or version of a translation

Schedule or publish an article

After the content in the article is complete and reviewed, you can publish the article to the portal to make it available to your customers.

Important
If your organization is using a portal for publishing the knowledge articles, your customizer can write a plug-in that can pick the published articles and post on your portal, and also capture the article views back.

1. Make sure that you have the Publish and Update permission on the Knowledge Article record type. These permissions are added by default to the Knowledge Manager, Customer Service Manager, Customer Service Representative, or System Administrator role.
2. In the interactive service hub, go to **Service** > **Knowledge Articles**.
3. Open a knowledge article that's in the Approved state.
4. To make it easy to find knowledge articles related to specific products, associate the knowledge article with a product.

    a. On the command bar, click **More** > **Relate Product**.

    b. In the **Select Product to Associate with** field, click the **Lookup** button, elect a product this article is about, and then, click **Associate**.

    The associated article appears in the **Related Products** list in the **Related Information** section of the **Summary** tab.

5. On the process bar, click the **Publish** stage.
6. In **the Set Product Associations** field, click **Mark as Complete**.
7. If you want to schedule the article to publish on a later date, on the **Summary** tab, in the **Publish On** field, select a date and time to publish the article.
8. On the command bar, click **More** > **Publish**.

    a. In the **Publish** field, select whether you want to publish the knowledge article right away or in the future. To publish the article in the future, in the **Publishing Date Time** field, select a date and time.

    b. In the **Published Status** field, select what status the article should be in after it is published. By default, **Published** is selected.

    c. In the **Expiration Date** field, select a date and time when you want the published article to expire. Expired articles are no longer available in searches.

    d. If you've set an expiration date, in the **Expiration Status** field, select the status the knowledge article should be set to after it expires.

    e. To publish all approved related translated articles with the article, in the **Publish Approved related translations with Article**, click **Yes**.

    f. Click **Publish**.

Track knowledge article views

Tracking your content helps you and your authoring team assess its value to your organization and your customers. Knowing and understanding when, where, and how many times an article was viewed tells you how much your customers and team members rely on the information that it contains. This data is extremely useful when creating future content curation plans and can help you decide what content you will deliver in the future, as well as how you deliver it, where you deploy it, and what style or structure you use to write it.

To view an article's view counts and other statistics, open the article you want to track, and then click the **Analytics** tab.

- **Views** section. Shows you the total number of times that this article has been viewed. This figure represents the total views of all versions and all translations of this article combined. It also shows individual article views on specific days. You can click the column headers to sort by chronological order or by the number of views.
- **Cases** section. Shows a list of the cases that have used this article. Double-click a case to view its details.

  By reviewing cases that have used your articles, you can gain valuable insights into the questions that customers are asking, as well as what avenues they tried before asking for help. This data can help you expose your knowledge articles better and provide more useful information to your customers and team members.

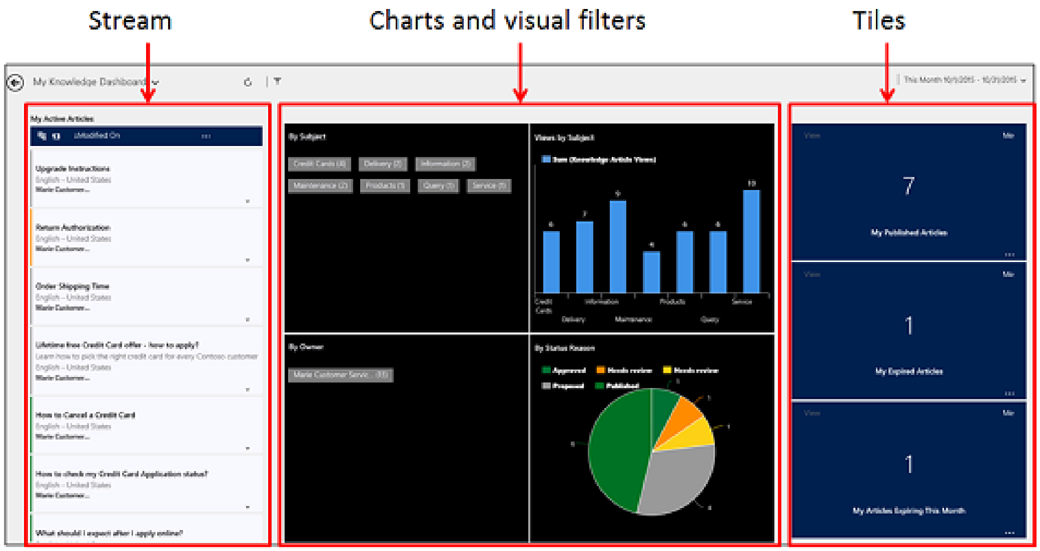
Monitor knowledge articles with dashboards

Knowledge managers and authors can now monitor the status of knowledge articles using the two new default dashboards available in the interactive service hub.

Note
If these dashboards don't offer what you need, you can create new interactive dashboards. More information: [Configure interactive service hub dashboards]

My knowledge dashboard

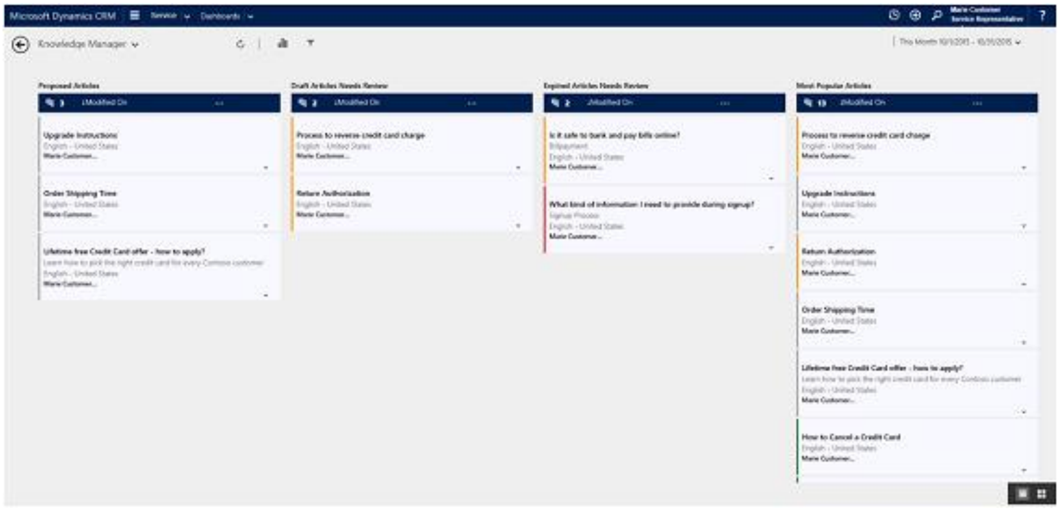
This dashboard is designed for authors to give them a visual snapshot of the number of knowledge articles they're working on and their status. It helps them quickly know things like article expiring in the month and articles in review.



- Streams show data from views or queues. In the knowledge dashboard, the stream shows the active articles assigned to the author.
- Charts provide a count of relevant records in the streams, such as articles by status reason, articles by owner, or articles by subject. They also act as visual filters. You can drill down in a chart to see data that interests you the most.
- Tiles give authors an aggregated view of data in the streams and help them monitor the volume of their knowledge articles.

Knowledge manager

This dashboard is designed specifically for knowledge managers. As a knowledge manager, you can quickly know the most popular articles, articles that need review, or articles that are about to expire, and take necessary actions on the articles right from here.



More information: [Use interactive dashboards to effectively manage service cases]

Use interactive dashboards to effectively manage service cases

Microsoft Dynamics CRM interactive experience dashboards are a one-stop workplace where you review your workload and take actions. The information in the interactive dashboard is shown in real time, coming from various views and queues. The interactive dashboards with their modern and intuitive interface are optimized for the customer service experience. For example, instead of paging through the application looking for a particular case, you'll be able to open and update the case right from the dashboard. This will save you time, help to focus on tasks at hand, and get more work done. You'll need sufficient permissions to use the interactive dashboards. The permissions will be assigned to you by an administrator.

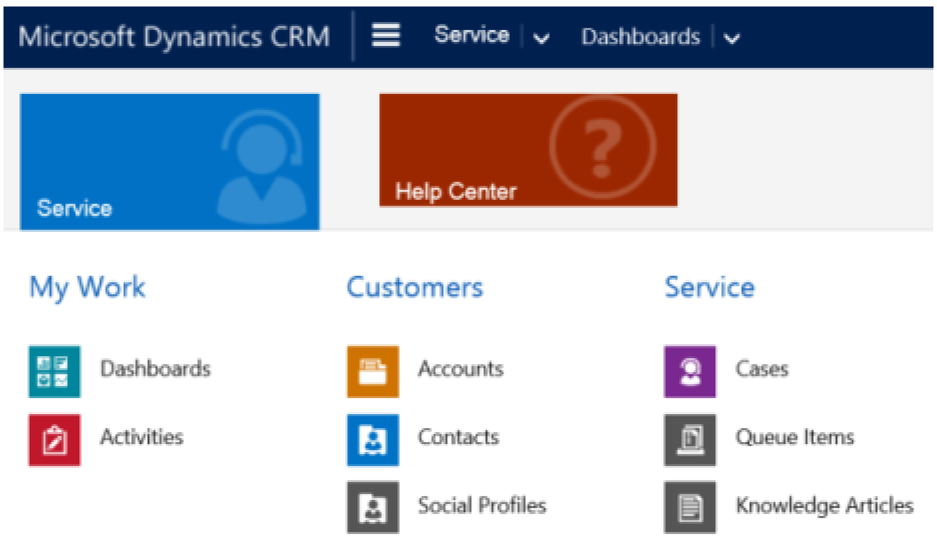
In this section:

Interactive experience dashboards overview

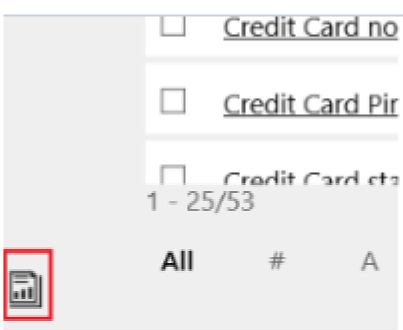
The interactive dashboards come in two flavors: multi-stream and single-stream.

When you sign in to the interactive service hub, you're looking at the Tier 1 multi-stream default dashboard. A multi-stream dashboard displays data in real time over multiple data streams. The data in a stream is based on an entity's view or a queue, such as My Activities, My Cases, or Cases in the Banking Queue. While a stream always contains information only about one entity, each stream on the dashboard may contain information about a different entity. For example, you may be tracking cases in one stream and accounts in the other stream, but, you can't track cases and accounts in the same stream. In a multi-stream dashboard all streams may be displaying data based on the same entity.

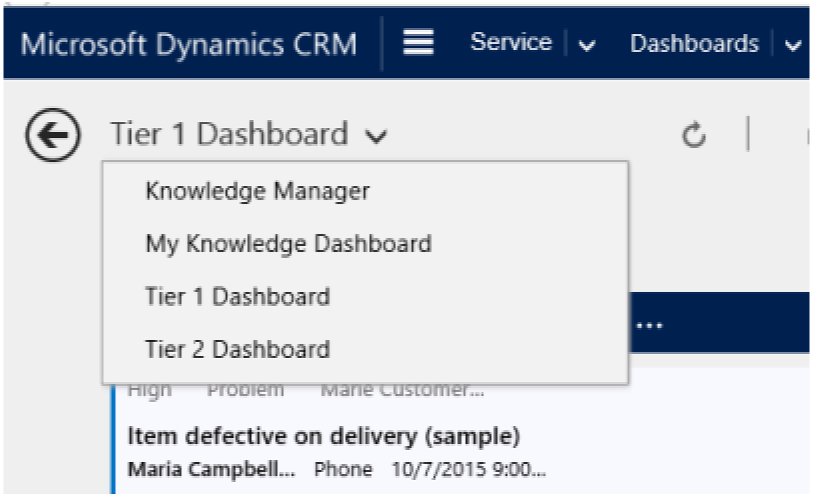
You also could be using a multi-stream entity-specific dashboard, such as the Cases dashboard. To open a dashboard like this, you'll need to navigate to **Service** and down to a specific entity, such as **Cases**, as shown here.



The default **Cases** grid is displayed. To open the **Cases** dashboard, click the square button in the bottom left corner of the page, as shown here.



Multi-stream dashboards target Tier 1 support, where customer service representatives handle many support cases at the same time. An entity-specific dashboard can be useful for Tier 1 representatives or Tier 2 customer representatives that look at fewer, but, more complex cases. In the multi-stream dashboard, you can easily switch from a standard view to the tile view. The interactive tiles show an aggregated view of the data across the queues or views. You can also click the tile to drill down to the underlying records. The interactive dashboard application opens with the Tier 1 interactive dashboard. However, you can make another selection from the available dashboards, as shown here.



Single-stream dashboards display real-time data over one stream based on a view or queue. The tiles are positioned on the right side of the dashboards and are always shown. Single-stream dashboards are helpful to Tier 2 leads or managers, who monitor fewer, but more complex or escalated cases in a single view or queue.

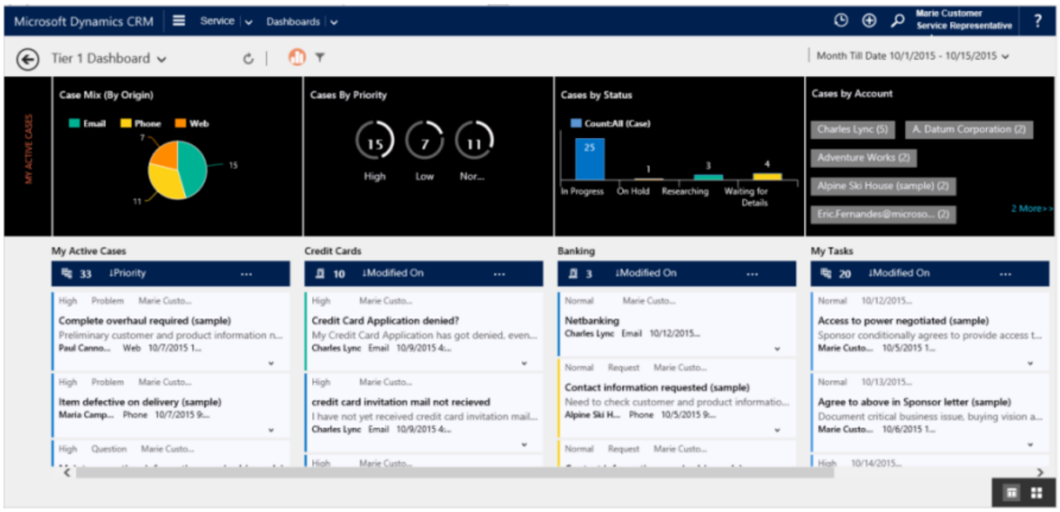
Multi-stream and single-stream dashboards contain interactive charts that give you a count of relevant records, such as cases by priority or by status. These charts also act as visual filters.

You can apply additional filtering with global filters and timeframe filters. The global filter works on streams and charts in the dashboard. You can sort the data in a stream based on different criteria, such as the priority, status, or the date when the record was created.

The illustrations here show multi-stream and single-stream dashboards with the header pane. Below the header you see visual filters and streams. In the single-stream dashboard, you also see tiles. The dashboard header shown here contains the following controls and clickable buttons, from left to right: dashboard selector, refresh, visual filter (interactive chart) button, global filter button, and timeframe filter.

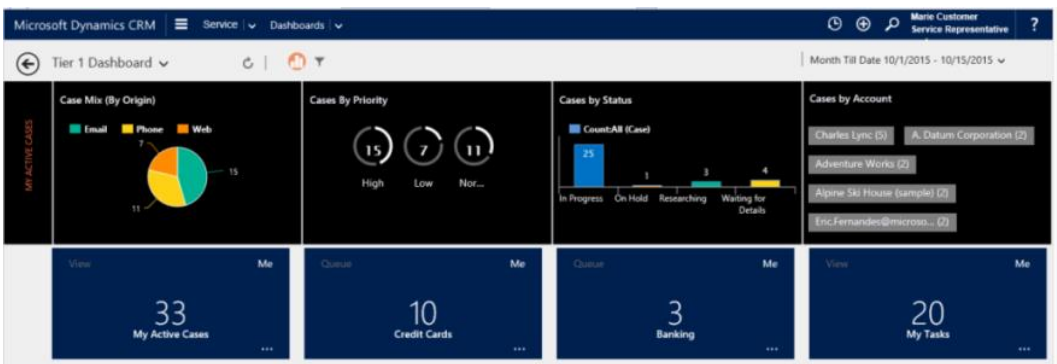
Multi-stream dashboard standard view

In the multi-stream dashboard, you see a row of visual filters (interactive charts) at the top with the data streams below.



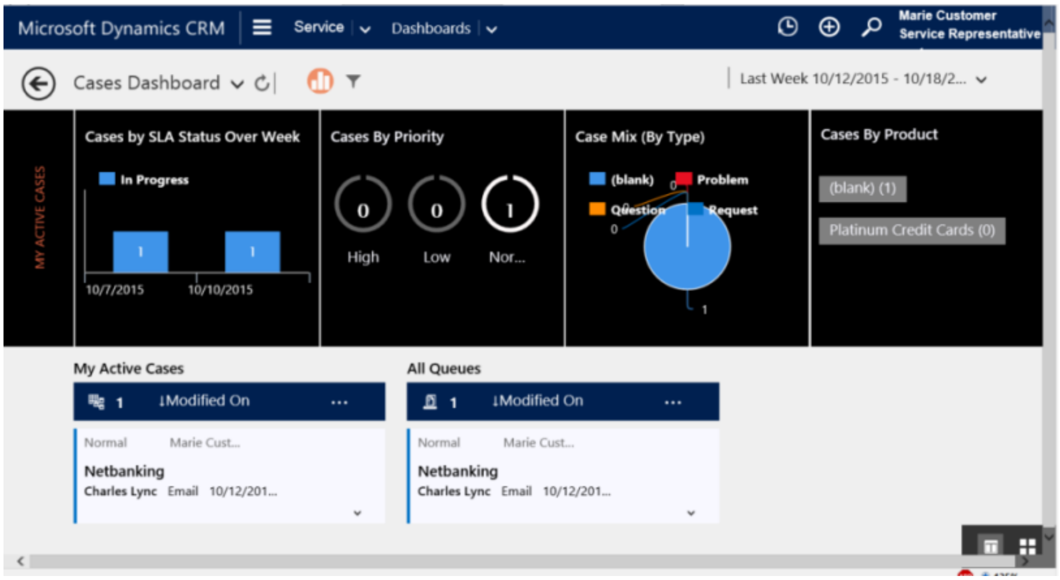
Multi-stream dashboard tile view

The same dashboard, only in the tile view.



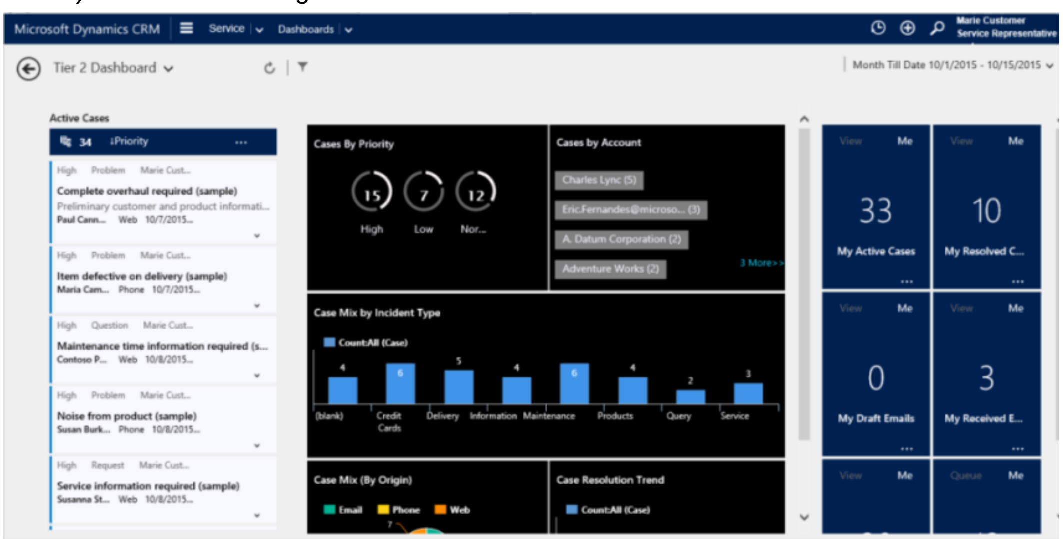
Multi-stream entity specific dashboard standard view

The following illustration shows the entity specific dashboard for the **Case** entity.



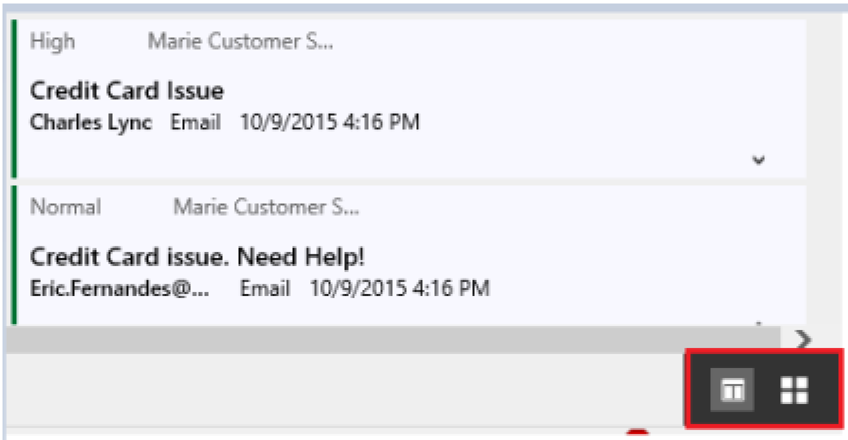
Single-stream dashboard

The single-stream dashboard contains the data stream on the left and visual filters (interactive charts) and tiles on the right.

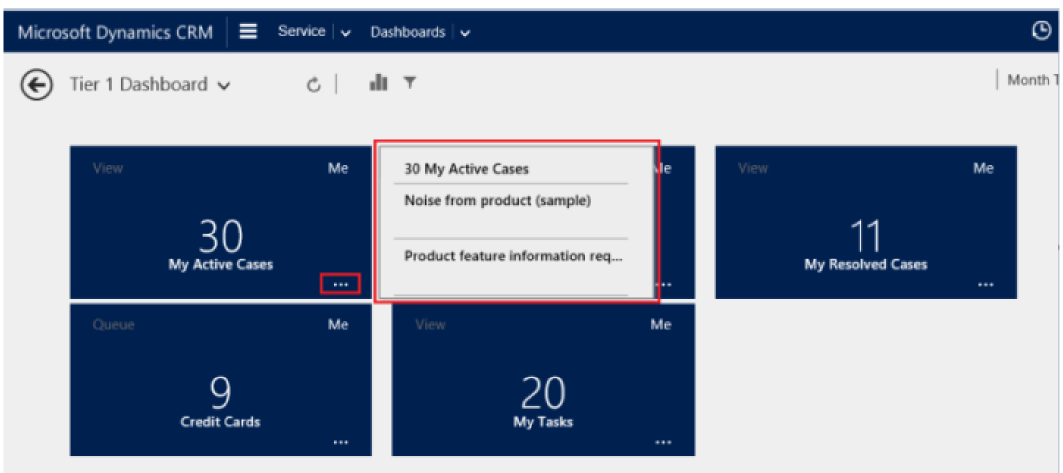


Interactive tiles

Interactive tiles provide an aggregated view of the information in the streams, across queues or views that interest you most. They help you monitor the volume of cases and quickly drill down to a particular case. In the multi-stream dashboard, you can switch from the standard view to the tile view using the switcher, a control at the bottom right corner of the dashboard, as shown here. In the single-stream dashboard, the tiles are always shown and there is no switcher on the dashboard.

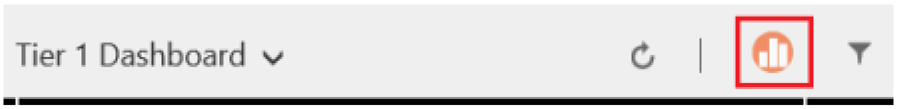


If you have five streams in the multi-stream dashboard in the standard view, after you switch to tiles, you'll see five tiles. If a view that tracks your active cases contains 30 items, the corresponding **My Active Cases** tile will display a numerical number 30 in the center of the tile. To drill down to a particular case, click the tile anywhere or **More (…)** in the right bottom corner. A flyout window will open. If there are too many cases to show, the window will have a scrollbar. You can navigate and click a particular case in the list, which will take you straight to the case form. The illustration shows the tiles and underlined cases in the list.

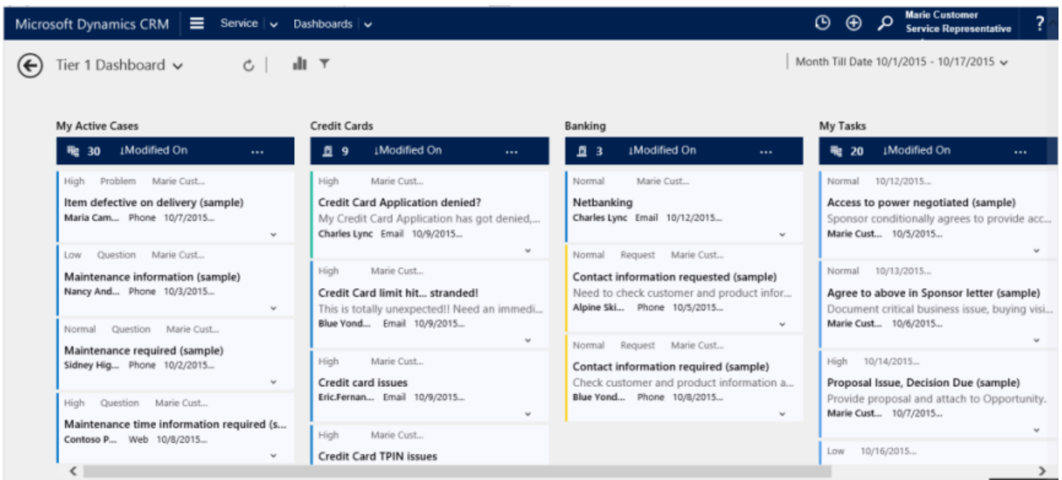


Visual filters (interactive charts)

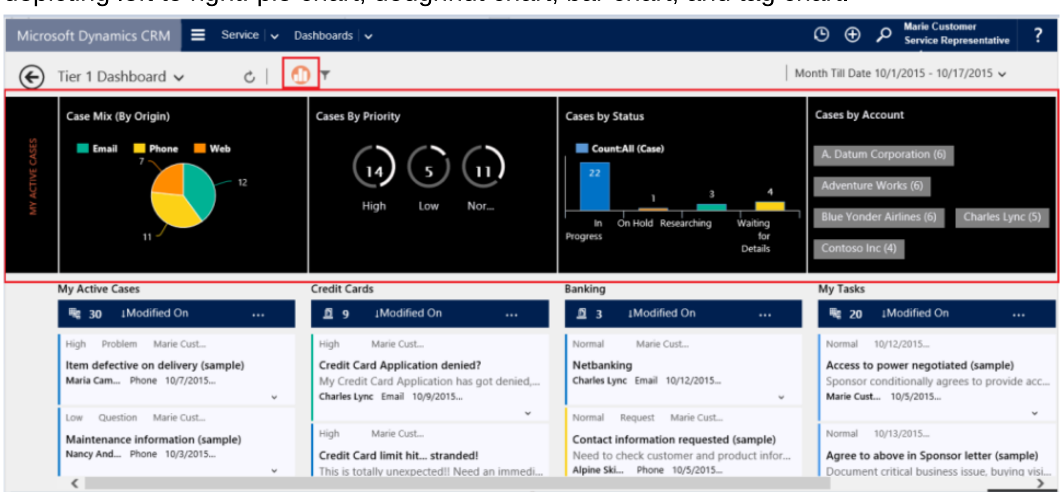
Interactive charts provide a visual snapshot of key metrics, such as cases by priority or by origin. They also act as visual filters (interactive charts) to help remove clutter from the screen and display information that interests you most. For example, if you click the High Priority circle in the "Cases by Priority" chart, the dashboard will refresh and you'll see only high priority cases in your data streams. You can find different types of charts on your dashboard, such as pie, bar, doughnut, or tag chart. Visual filters (interactive charts) and tiles help you see the changes and patterns in data, and act quickly to address the most important issues. To display the charts on the dashboard, click the visual filter (interactive chart) button in the dashboard header, as shown here. The clickable button acts as a toggle switch, to show or hide the visual filters (interactive charts) on the dashboard. On the single-stream dashboard, the visual filters (interactive charts) are always shown and can't be hidden from the view.



The following illustration shows the multi-stream dashboard without visual filters



The following illustration shows the multi-stream dashboard with visual filters (interactive charts) depicting left to right: pie chart, doughnut chart, bar chart, and tag chart.

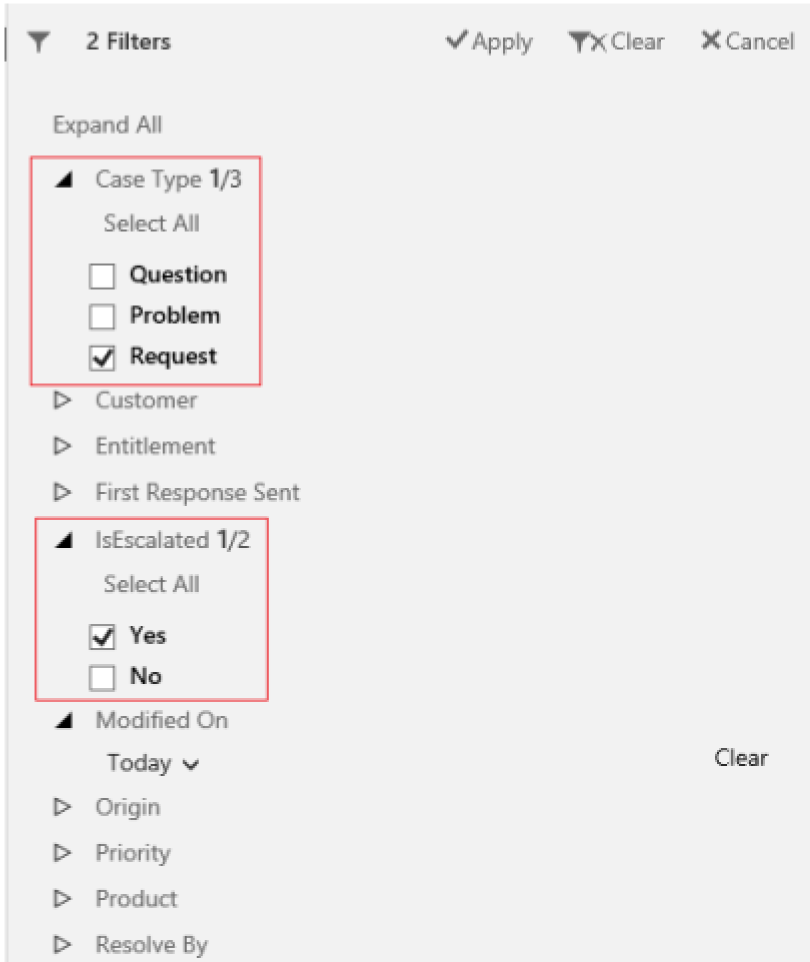


Global filter

To add granularity to filtering data, you can use the global filter. For example, you can apply the global filter to show only escalated cases and the cases that are marked as “Request.”

The global filter button is shown in the dashboard header to the right of the chart button, as shown here.

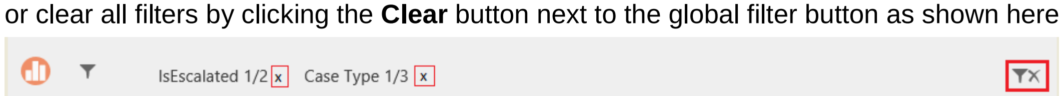
When you click the global filter button, the filter flyout window opens. The entity fields that are preconfigured by your administrator appear in alphabetical order in the flyout window. You can select multiple values in a field, as well as values from multiple fields. In our example, we checked **Yes** for the **IsEscalated** field and checked the cases of type **Request**. Click **Apply** for the action to take place.



After you apply global filters, the dashboard refreshes to show you only the escalated and requested cases in charts, streams, and tiles that are based on the filter entity (the filter entity is the entity that is used in the charts). By applying the visual filter for critical cases and the global filter for escalated cases, with just a few clicks, you went from a long list of cases to only a few cases that really matter to you.

Clear the filters

Filtering helps remove the clutter on the screen and show only the work items that you want to focus on. However, if you want to see the entire unfiltered workload, it takes only a click of the mouse to clear a particular filter or all filters at once. The applied filters are conveniently shown in the dashboard header and you can clear the filters by clicking the Clear button next to each filter or clear all filters by clicking the **Clear** button next to the global filter button as shown here.

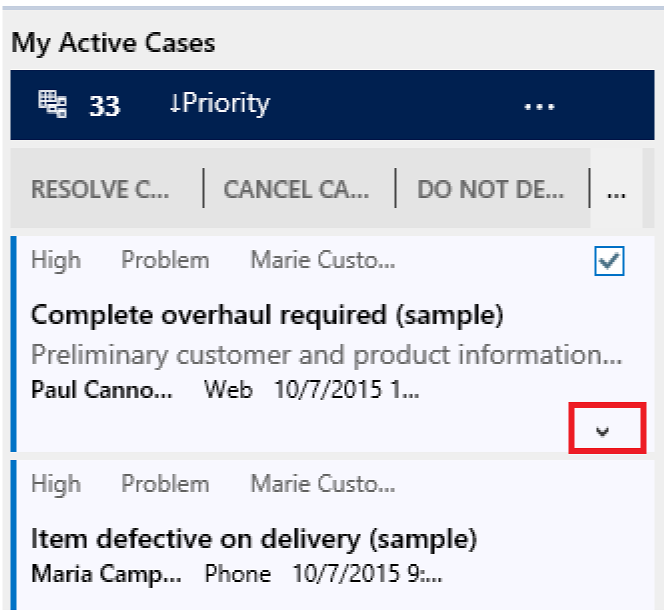


Timeframe filter

You can also apply the timeframe to display cases in a specified period of time. For example, you can choose to view data from last month, last week, a particular date, or today.

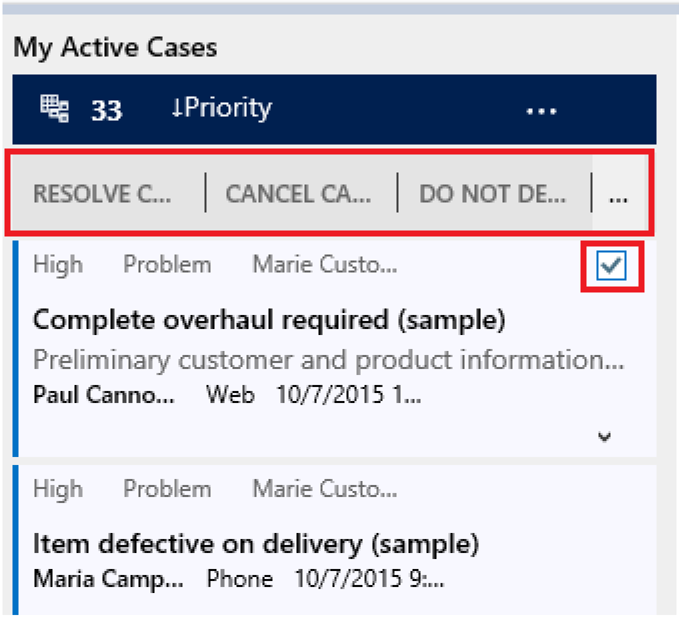
Collapse or expand work item description in the stream

To learn more about the case, you can expand the work item description area. Click the small arrow in the bottom right corner of the work item to expand or collapse the text, as shown here.

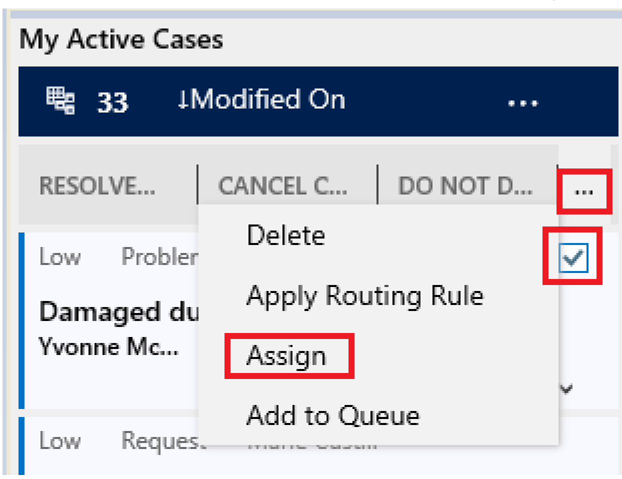


Show quick actions

You can select the check box in the top right corner of the work item to open the quick actions menu. From this menu, you can directly resolve or cancel a case, or assign the case to someone else, as shown here.

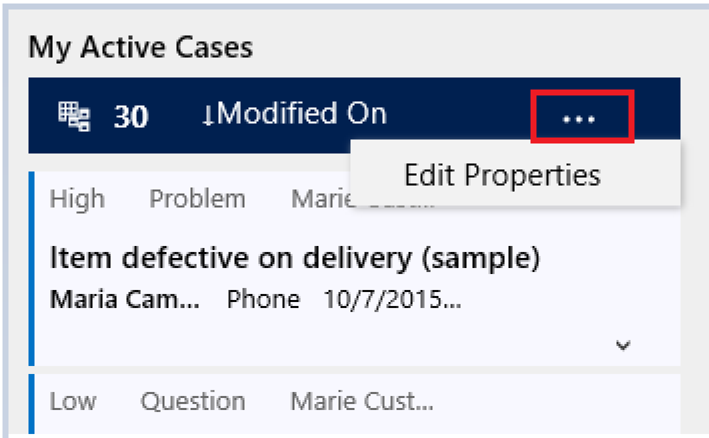


To see more menu items you can use the **More (…)** button on the quick actions menu, or toggle the check box. The illustration shows the **Assign** menu selection.

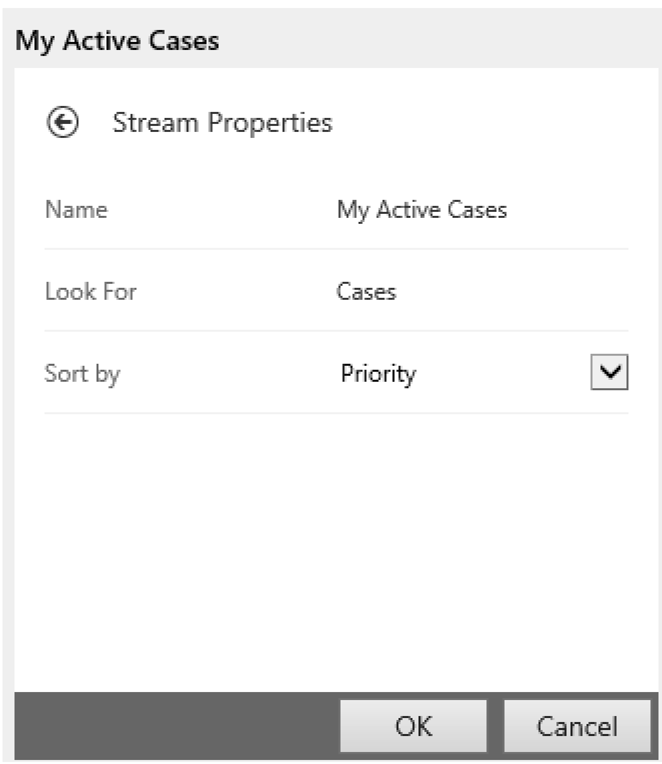


Edit stream properties

You can edit the stream properties by clicking **More (…)** in the stream header, as shown here.



For example, you can choose to sort the cases by priority, instead of the date the case was created or modified. When you click **Edit Properties**, the flyout dialog opens, in which you can make a new selection, such as sort by **Priority**, as shown here. After you change the sort criteria, the dashboard refreshes and you see the cases sorted by the priority in the stream.

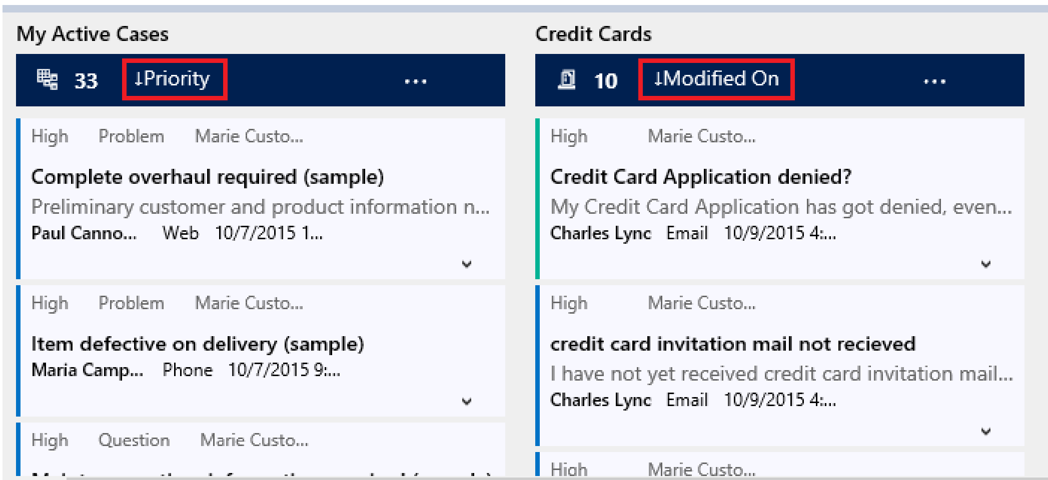


Note

By default, sorting is initially based on the **Modified On** field. If you change the default sorting from **Modified On** to something else, and the **Modified On** selection isn't in the **Sort By** list in the flyout, you won't be able to go back to sorting by that field again.

Change the sort order in the data stream

You can easily toggle the sort order in the stream by clicking the field name on which the data sorted, such as **Priority** or **Modified On**. You can sort the data to see high priority cases first, as shown here.



Color-coded data in streams and charts

The information in the charts and streams is color coded for the fields that contain a set of options. For example, a case type can be "Question," "Problem," or Request." Or, a case can be escalated ("Yes"), or not escalated ("No"). Each of these options can be assigned a specific color. For example, cases that are questions can be shown in yellow, cases that are requests in purple, and problem cases can be shown in red. In the streams, the color is shown in the thin vertical line to the left of the work item description. The doughnut charts and tag charts don't show information in color. They depict information in white, gray, and black shades. You can work with your administrator to choose the colors you like for your dashboard data.

Information for customizers

For information on how to configure the interactive dashboards, see [TechNet: Configure interactive experience dashboards](#)

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