

How do I set up an internal knowledgebase for agents only?

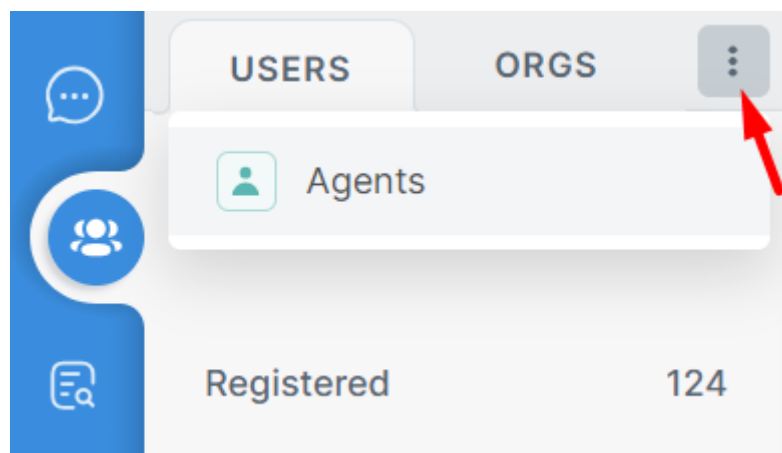
Eloise Rea - 2023-09-08 - Comments (0) - Help Center

If you want to have Knowledgebase Articles about internal procedures for Agents and don't want them to be visible to Users. You can implement this using Usergroups.

Agents will be able to browse and search published Articles on the Help Center, without Users being able to see them.

You can do this by using adding Agents to a **Usergroup** and this can be used to control access to Article Categories.

1. In **Admin > CRM > Usergroups**, create an '**Internal Users**' Usergroup.
2. In the Agent Interface **CRM** app, click the three dots next to the Orgs tab to access a list of your Agents. Go through your Agents' User records and add them to the **Internal Users** usergroup.



3. In the Agent interface **Help Center** section, add a new Knowledgebase category called 'Internal'. Set the permissions so that only members of the Agent's usergroup can view it.

New Knowledgebase Category

Name

Internal

Icon

Pick Icon

Upload Image

Usergroups

☐ Everyone

☐ Registered


☐ 221B Solar Trial

☒ Internal Users

☐ Contractors

☐ Support

Parent Category

 Knowledgebase

Create

4. Create the Articles for your Agents in that category.

You can now publish the articles to the Help Center, but only Agents will be able to see them.

Note

Alternatively, Agents can browse Knowledgebase Articles in the Agent interface, so you could just keep the articles Unpublished.

Tags

knowledgebase