



Sales Creatio overview

Presented by

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the CRM experts 

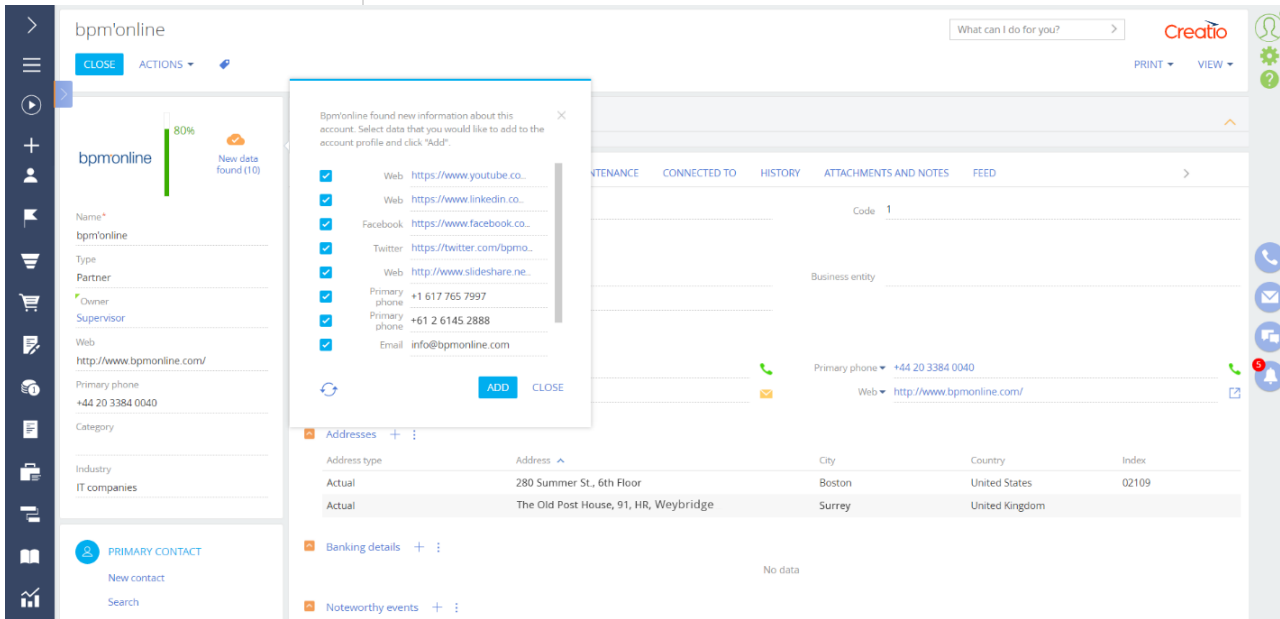
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Sales Creatio features overview

360° customer view

Account and contact management	Create a single database of all accounts and contacts you work with and build a 360-degree view of your customers. Use Sales Creatio to keep record of contact data, including addresses, with the ability to see them on the map, track connections between accounts and the relationships in company structures, see a list of activities they're involved in and the entire history of interactions. Having a 360-degree view of your customers, you can predict their buying behavior and preferences to win their trust.
Intelligent data enrichment	Manage your CRM data faster and with minimal effort through the use of automatic smart data enrichment. Creatio's CRM data scientist will swiftly identify email addresses, phone numbers, social media profiles and other valuable information about a company from open sources. With this intelligent tool, Creatio users get the most complete and up-to-date customer data with no additional effort.
 <p>The screenshot displays the Creatio CRM interface for a customer named 'bpmonline'. The interface is divided into several sections: a left sidebar with navigation icons, a main profile card showing contact details like name, type, and phone numbers, a central data enrichment window listing various data points (web, social media, phone, email) with checkboxes, and a bottom section with addresses and banking details. The enrichment window is currently open, showing a list of data points to be added to the customer profile.</p>	
Data enrichment through social media	Find customers on Facebook or Twitter and enrich their profiles using the pre-built social media integration features. Get various information on contacts and companies from social networks with the click of a mouse.
Profile completeness	Manage the completeness of information on your customers, their contacts and deals. The system allows you to add weight to each parameter in customer profile and visualize the data in a convenient way. Sales rep can easily identify important customers and transactions, which lack the important details, and a supervisor can promptly evaluate the completeness of customer data in sales portfolio and make sure that database contains all relevant information. In case of information gaps the system allows to send a request to complete the missing data.

Customer segmentation	Segment customers by multiple parameters to improve communication and build stronger relationships. Sales Creatio allows building custom segments by industry, revenue, priority or any parameter you choose. Using dynamic segments, which are filled automatically based on the set parameters, you can, for example, filter all the accounts which you have not contacted for one month.
Interactions and communication history	Build relationships with customers based on a complete history of their communication patterns. Sales Creatio keeps track of every interaction with an account or contact, including meetings and calls, contracts, orders and invoices. This enables you to evaluate the progress of your relationships, change your approach to achieve better results and make well-thought data-driven decisions.
Search and merge duplicates	Identify and eliminate duplicate records in Sales Creatio in order to manage your customer database more efficiently. When creating new records the system automatically checks for duplicates, or you can perform a manual check or schedule a recurrent search for duplicate accounts and contacts. Be sure you make the most of every interaction with customer.
Customer database analytics	Analyze your customer database and convert the data into actionable insight that will help to identify new opportunities. A thorough analysis enables you to see your customer base under a different lens and identify the top customers that could fuel your company's growth. Customize dashboards in Sales Creatio to keep an eye on the key performance indicators.

Collaboration tools

Communication panel	Communicate with your team and customers directly from the system. Make calls, manage email, approve contracts and collaborate in the enterprise social network using the Communication panel. All notifications are also here, so you will not miss any important event.
Tasks and calendar	Plan your work, tasks and meetings in your calendar within Sales Creatio. Create personal or group tasks linked to contacts, opportunities or documents. Synchronize your tasks and calendar with Google Calendar and Microsoft Exchange. Get notifications and reminders in the notification panel.
Email	Manage email from all your email boxes in a single unified environment – Sales Creatio. Each email can be linked to the relevant account, opportunity, order or other related object. Integration with MS Exchange and Google enable you to merge all of your email boxes and keep track of the correspondence in Sales Creatio.
MS Outlook integration	SmartCloud Connect turns your Microsoft Outlook into a single working window for CRM. Create, manage and link leads, contacts, accounts, opportunities or any other type of record directly from your email box or Outlook calendar without logging into Creatio.
Calls	Make and receive calls directly in the system thanks to integration with a PBX system and a unique solution designed to effortlessly connect to any cloud VoIP service. Access the complete call history via the communication panel to swiftly find recently contacted customers. Leverage the call recording capabilities to control the sales reps' performance and video-calls to boost collaboration between team members. In addition, Creatio users can communicate with each other (including video calls) via IP-telephony completely free of charge!
Enterprise social network	Use Enterprise Social Network (ESN) to keep your finger on the pulse of your business. You can get updates and notifications on the latest deals, projects or even contacts from various channels with an ability to comment and "like" different posts in the newsfeed. You can use the ESN in the Creatio mobile app as well.
Analytics	Keep track of day-to-day operations and overall business performance with Sales Creatio. Analyze employee productivity based on their tasks, emails and phone calls. All dashboards are easily customizable and track important indicators, such as the average number of activities per day or the number of successful meetings compared to the previous period, as well as many others.

Lead management

Lead generation	Sales Creatio has all the right tools for capturing and tracking leads through a broad range of sources. Add leads from different sources into the single database in just a few clicks. Let Sales Creatio automatically verify the data, create a new contact and guide you through the process of lead management.
Lead qualification	Thoroughly qualify each lead to save time by working only with sales-ready leads. Use Sales Creatio for merging lead duplicates, link a lead to the relevant account, enrich lead data with insightful intelligence to get it fully prepared for a sales follow up.
Lead distribution	Once qualification process is finished, it is important to assign leads to the right people and teams. Sales Creatio can help distribute the leads based on the prospect's needs, profile (geography, industry, budget) as well as the current workload of telemarketing and inside sales teams. If the lead was not qualified for sales, it can be assigned to lead nurturing campaigns.
Hand-off to sales	Make sure you know all the detail before transferring the lead into an opportunity or an order. Record the history of communications in accordance with the sales process. If the customer is ready to make an order, initiate the appropriate business process in one click. Use the action dashboard to focus only on key lead indicators.
Analytics on leads	Approach prospects in a smart way with Creatio analytics tools for lead management. Use the dashboards to analyze statistics on leads, such as number and quality of the new leads, conversion rate, etc. All this will help to increase the conversion of prospects into the sales ready opportunities.

Opportunity management

Opportunity tracking

Manage all opportunities in Sales Creatio using the out-of-the-box business process. Define tactics for each opportunity, identify key decision makers, track competitors, analyze their strengths and weaknesses. Generate sales forecasts taking into account client's budget, opportunity stage and probability.

Opportunity history

For each opportunity regardless of its status track its complete history: activities, emails, quotes, feed discussions, files and notes. When analyzing you can return to any stage of the customer interaction based on the chronology of events.

The screenshot displays the Sales Creatio interface for managing opportunities. On the left, a sidebar lists several opportunities with details like Account, Stage, Owner, and Opportunity amount. The main area shows a detailed view of opportunity 017, 'Alpha Business / Package'. This view includes a progress bar for the sales process (Qualification, Presentation, Proposal submission, Contracting, Closed won), a 'NEXT STEPS' section with an action 'Analyze supplier situation', and a table of opportunity history. The history table lists stages, start/end dates, and completion status. A right-hand sidebar contains navigation icons for various CRM functions.

Stages	Start date	End date
Qualification	4/6/2016	4/13/2016
Presentation	4/13/2016	4/20/2016
Needs analysis	4/13/2016	4/13/2016
Proposal submission	4/20/2016	4/27/2016
Id. decision makers	4/20/2016	4/20/2016
Proposal development	4/20/2016	4/20/2016
Contracting	4/27/2016	5/4/2016
Negotiations	4/27/2016	4/27/2016
Closed won	5/4/2016	5/4/2016

Out-of-the-box sales process

The system is equipped with out-of-the-box best practice processes for corporate sales. The process is designed to disseminate best practices for extended sales cycles, thereby greatly increasing sales manager's chances to successfully close a deal. Action dashboards guide users through the next steps that need to be accomplished in order to effectively manage opportunities at each stage of the pipeline and close deals faster.

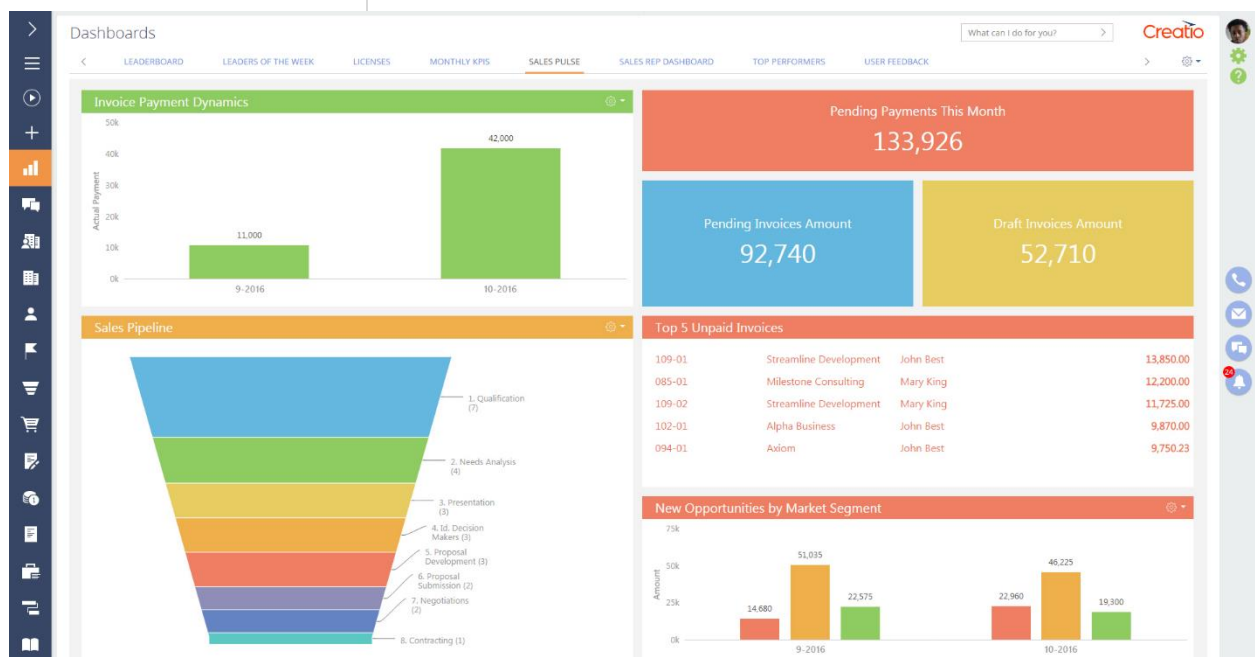
Sales initiation

Convert leads into opportunities by defining executives, client's budget, needs, and time for decision making. When creating a new opportunity the system automatically runs reference process to simplify the manager's work.

Qualification

Analyze and specify your customers' needs taking into account the information gathered with Sales Creatio. Opportunity page displays key indicators that can help assess probability of closure for each opportunity. Having analyzed each opportunity, reject or confirm further participation in a deal, and assign a sales rep to own the opportunity.

Presentation	Choose the appropriate presentation from the digital library where all sales assets are stored. Identify decision makers to focus your efforts on and ensure better results. The underlying process will remind you to send the meeting minutes upon completion of the presentation summarizing all decisions and agreements that were made.
Develop and submit a proposal	Leverage valuable data collected throughout the negotiation process to effectively define the sales tactics. Prepare proposal, calculate appropriate pricing and attach corresponding documents linked to the opportunity. Easily approve proposals internally by simply following the steps of the document approval process.
Contracting	Close the deal by following the guidelines of the contracting stage. With the help of the reference process for document approval you will easily pass the approval stage and have all the paperwork done for signing. Don't forget to register your win in the system and get yourself on the leaderboard!
Sales pipeline	Leverage the sales pipeline tool in the system to analyze the company's performance at each opportunity stage, identify "bottlenecks" in the opportunity management process. Assess conversion between the stages, evaluate pipeline integrity, compare the pipelines by individual sales reps or departments. The system allows you to drill down into the particular opportunity stage and see the number of opportunities at this stage and the sales volume by sales reps.
Sales analytics	Get comprehensive statistics on opportunities in Sales Creatio. Evaluate the efficiency of sales on each of the stages, identify best sales reps using the "Sales Leader" dashboard or monitor the efficiency of the sales department as a whole with the help of the "Sales Pulse" dashboard.



Orders and invoices

Order list	Easily manage orders, using Sales Creatio. You can classify orders by account type (individuals or legal entities), group orders by stages, budgets, products or services, owners, etc. Monitor the current status of key orders within your company, and analyze the effectiveness of the order processing.
Orders history	Keep track of the complete history of each order using Sales Creatio. The system allows you to keep track of the complete chronology of activities, documents and communications per each particular order. Even with a change of the contact person all the agreements and conditions will be stated in the order, and the customer will get excellent service.
Orders processing from website	Configure automatic registration of orders from your website. Integrate Creatio with your website and process all orders in a single window of the CRM system.
Single window for order processing	Run orders in Sales Creatio in a matter of minutes. A single window for order processing enables you to create an order using a ready-to-use template, choose the products to be added and invoice the client.

The screenshot displays the 'ORD-39' order summary in the Creatio CRM. The top section shows the order status as '1. Draft' and the total amount as \$11,927.16. Below this, a table lists the products included in the order:

Product	Price	Quantity	Unit of measure	Discount, %	Total
Laptop ASUS ZenBook UX301LA-C4080H (90N...	2,861.72	3.00		0.00	8,585.16
Graphics Card MSI GTX 980Ti 6GD5	1,049.98	2.00		0.00	2,099.96
Motherboard ASUS CROSSBLADE RANGER	308.97	2.00		0.00	617.94

Below the products table, the 'Installment plan' section shows a schedule of payments and deliveries:

Type	Stage	Deferment (days)	Due date	Actual date	%	Products	Expected amount	Actual amount	Invoice
Payment	50% prepayment	0	8/7/2011	8/7/2011	49.42	Add	5,894.75	5,894.75	INV-14
Payment	Complete payment	0	8/10/2011	8/10/2011	50.58	Add	6,032.41	0.00	INV-15
Delivery	50% delivered	0	8/14/2011	8/12/2011	49.42	Add	5,894.75	5,894.75	
Delivery	Complete delivery	3	8/18/2011	8/12/2011	50.58	Add	6,032.41	6,032.41	

The bottom of the screen shows the 'Delivery and payment' section with a 'Delivery type' of 'Courier' and buttons for 'Free trial', 'Request live demo', 'On-line Help', and 'e-cash payment'.

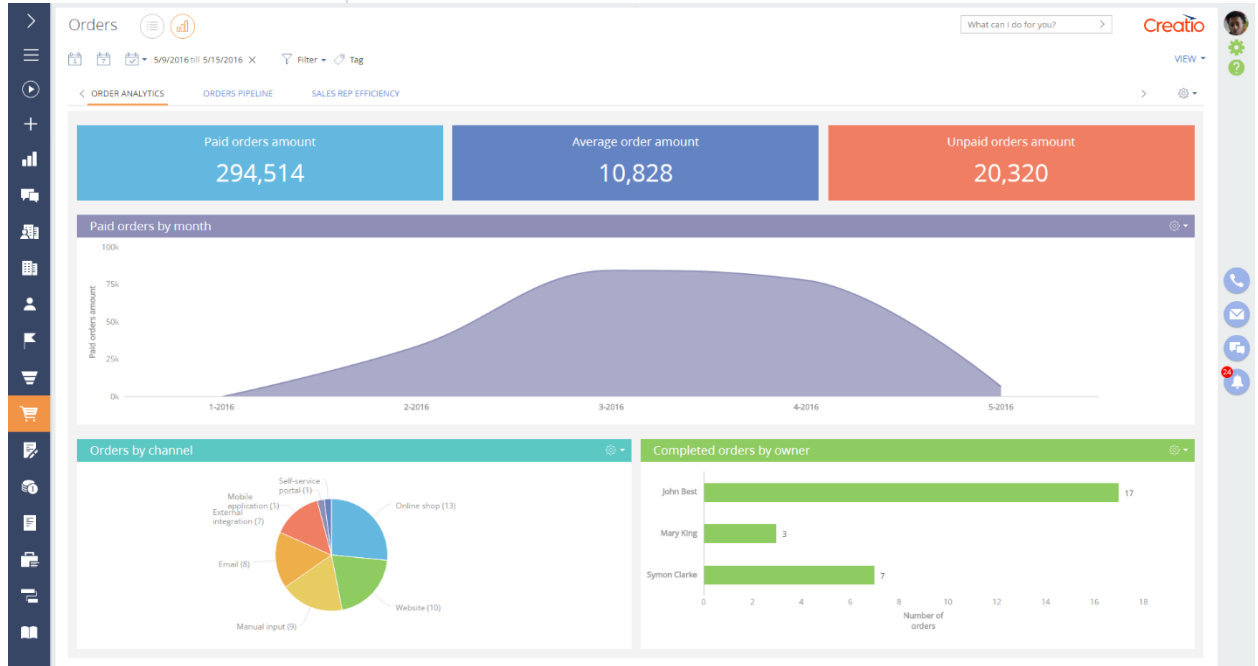
Supply and payment schedule	Plan a schedule of supplies and payments according to the agreements made with the customer. You can create supply schedule templates, which are used in your company most often, and change them when necessary. The system allows to group products based on supplies, as well as issue invoices and contracts according to the supply schedule.
Order approval	Save time and approve orders following each step of the best practice process. Use built-in process to get approval from one person, or easily modify it according to your needs.

Invoices

Issue invoices using standard templates in Sales Creatio. The system will remind an owner when the payment date approaches, which allows better control over the payments.

Orders and invoices analytics

Analyze orders and invoices by sales reps and customers. Track orders that are due for delivery and payment. Analytics will help to determine the bottlenecks in the order processing and ensure timely order fulfillment.



Field sales management

Field force management	Manage your field force using a single window in Sales Creatio. Create a schedule of visits for each representative. View locations on the map, monitor the actual visits by geo-tags from field sales rep check-ins in each of the locations. Leverage the data to analyze the efficiency of the department.
Field sales rules	Set the rules for working "in the fields" with different categories of customers. The system can promptly hint on the appropriate actions at each step of your visit to the customer: check-in, goods display monitoring, demo, product selection or placing an order. Each field sales representative can place the results on record in the system immediately after the meeting.
Mobile orders	Easily manage all contracts, related specifications and additional agreements using Sales Creatio. Attach electronic versions and photo copies of contracts, keep track of contracts details and history of amendments. From the given order the system allows you to quickly create several contracts for different accounts, copying all the parameters from the same order. Receive orders from a mobile device instantly during a meeting. The system will help to monitor SKUs and to quickly suggest the best product based on the order history.

The screenshot displays the 'Visit scheduling' interface in Sales Creatio. On the left, a sidebar contains navigation icons. The main area is divided into three sections: a list of customer accounts, a visit schedule, and a map.

Customer Accounts List:

Account Name	Last visit	Phone	Address
Axiom	06/18/2015	+1 212 532 3976	West 18th street
Stella Trading	06/18/2015	+1 212 652 2390	East 9th street
Prosaro	06/18/2015	+1 212 452 4576	East 3rd street
Leolinen	06/18/2015	+1 212 456 3486	37 Hester street
Roahway	06/18/2015	+1 212 655 4587	754 Fifth Avenue

Visit Schedule: A calendar view for 04/22/2016 (Monday) for user John Best. The schedule shows visits for Axiom, Stella Trading, Prosaro, and Leolinen at various times throughout the day.

Map: A street map showing the locations of the scheduled visits, marked with numbered pins (1, 2, 3, 4) corresponding to the customer accounts.

Sales forecasting



Forecast sales based on the variable criteria

Make sure your goals are achieved with Sales Creatio forecasting tools. You can easily plan sales volumes by managers, accounts or industries. Compare indicators across periods and apply smart filtering tools to get the information you need within a matter of seconds.

Analyze progress to meet and exceed sales quota

Evaluate the probability of meeting sales quotas using the plan vs. actual analysis tools in Creatio. When calculating results the system takes into account both, the amount of closed deals and the amount of opportunities in the pipeline with their probabilities of closure. With the help of Sales Creatio, managers can easily analyze sales reps efficiency and make the process of reaching sales goals transparent and clear.

Forecasts

What can I do for you?  

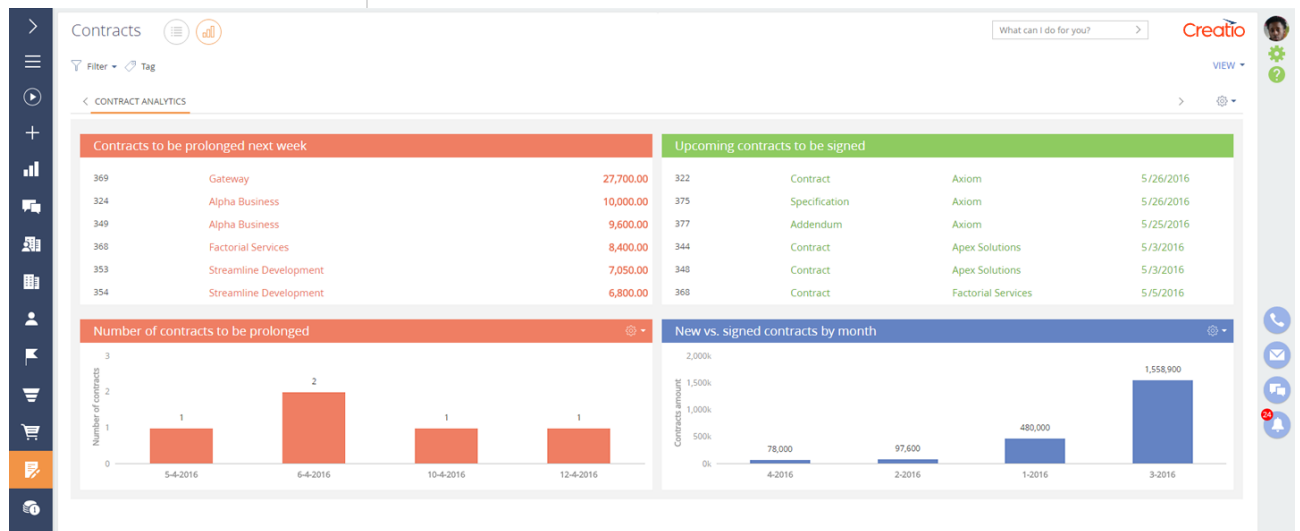
< FORECAST BY CUSTOMER FORECAST BY SALES DIVISION **FORECAST BY SALES MANAGER** >

ADD ACTIONS VIEW

	April 2016				May 2016				June 2016				Total		
	Expected	Actual	Closed, %	Pipeline	Expected	Actual	Closed, %	Pipeline	Expected	Actual	Closed, %	Pipeline	Expected	Actual	Closed, %
Nicholas Mason	354 000	0	0	7 200	360 000	126 000	35	0	366 000	587 400	160.49	435	2 436 000	713 400	29.29
Lynn A. Collins	777 000	0	0	0	792 000	1 390 050	175.51	0	807 000	421 500	26.12	622 350	5 373 000	1 811 550	33.72
Zoe Wood	370 000	0	0	0	377 000	226 500	60.08	0	384 000	345 000	89.84	192 510	2 538 000	571 500	22.52
Peter Moore	292 000	0	0	0	299 000	289 500	96.82	0	306 000	262 500	85.78	495 810	1 998 000	552 000	27.63
Christine Nelson	631 000	0	0	3 500	452 000	427 000	94.47	0	460 000	465 600	101.22	48 150	3 052 000	892 600	29.25
Ray Crowden	135 000	0	0	0	792 000	1 390 050	175.51	0	807 000	421 500	26.12	622 350	5 373 000	1 811 550	33.72
Timothy Sawyer	370 000	0	0	0	377 000	226 500	60.08	0	384 000	345 000	89.84	192 510	2 538 000	571 500	22.52
Tiffany J. Martin	292 000	0	0	0	299 000	289 500	96.82	0	306 000	262 500	85.78	495 810	1 998 000	552 000	27.63
Sebastian Hall	728 000	0	0	4 300	452 000	427 000	94.47	0	460 000	465 600	101.22	48 150	3 052 000	892 600	29.25
Sarah M. Richards	243 000	0	0	0	792 000	1 390 050	175.51	0	807 000	421 500	26.12	622 350	5 373 000	1 811 550	33.72
Jane Russel	370 000	0	0	0	377 000	226 500	60.08	0	384 000	345 000	89.84	192 510	2 538 000	571 500	22.52
Caleb Jones	292 000	0	0	0	299 000	289 500	96.82	0	306 000	262 500	85.78	495 810	1 998 000	552 000	27.63
Melinda Mitchell	444 000	0	0	2 100	452 000	427 000	94.47	0	460 000	465 600	101.22	48 150	3 052 000	892 600	29.25
Susan Lee	777 000	0	0	0	792 000	1 390 050	175.51	0	807 000	421 500	26.12	622 350	5 373 000	1 811 550	33.72
Travis Barker	370 000	0	0	0	377 000	226 500	60.08	0	384 000	345 000	89.84	192 510	2 538 000	571 500	22.52
John Best	292 000	0	0	0	299 000	289 500	96.82	0	306 000	262 500	85.78	495 810	1 998 000	552 000	27.63

Contract management

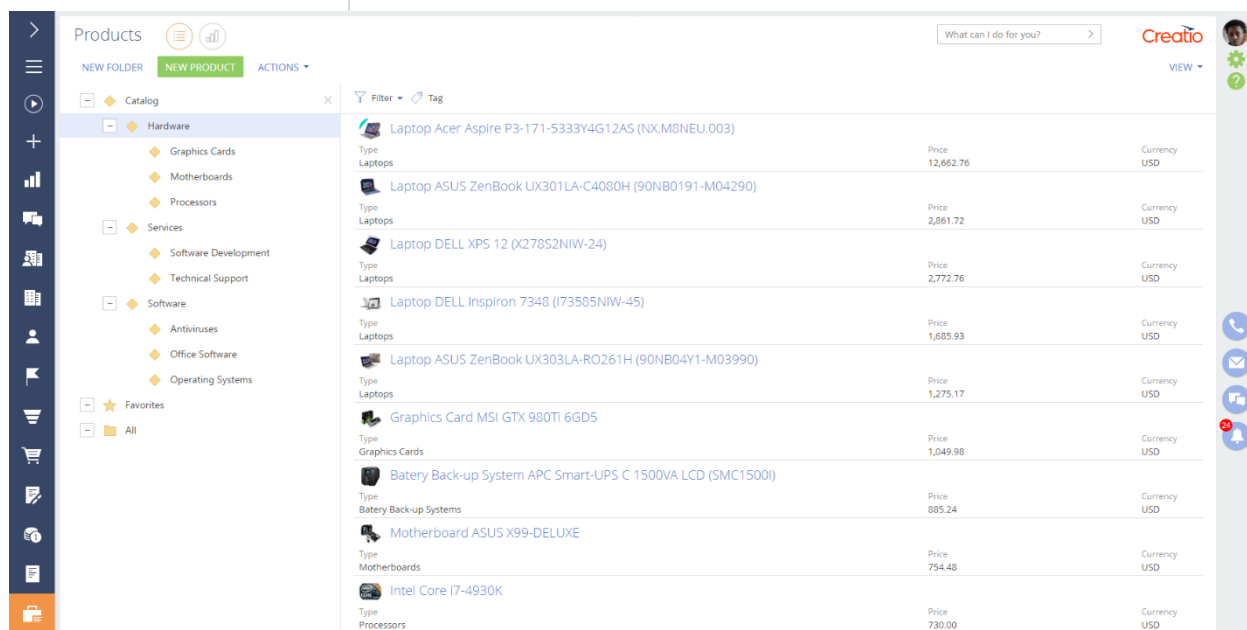
A single contract database	Easily manage all contracts, related specifications and additional agreements using Sales Creatio. Attach electronic versions and photocopies of contracts, keep track of contracts details and history of amendments. Create contracts manually or automatically based on orders.
Printable forms	Create print ready documents in a matter of seconds using standard templates in Sales Creatio. The system will automatically fill in all the required fields and can be easily edited if needed.
Contract approval	Save time by automating contract approvals, following a step-by-step pre-defined process. The system will automatically notify the owner when the document is approved. You can also set up parallel or sequential approval flows, as well as rules for approval delegating.
Analytics	Analyze the dynamics of closing deals and identify bottlenecks using Sales Creatio analytics. The system provides statistical data for a selected period, and helps monitoring overdue contracts that require urgent reaction.



Product management

Unified product catalog

Regardless of the complexity and size of your product and service portfolio, be certain you can store them all in Sales Creatio. Integrate the catalogue with your ERP system to keep the data up to date and relevant.



Product catalogue management

Maintain product catalogue hierarchy based on the structure of your product portfolio. Make sure sales reps also work with new and promotional items by placing them in the Favorites group of your product catalogue in Sales Creatio.

Product attributes

Easily group products based on custom or pre-defined product attributes, such as brand, category, etc. Specifying different attributes allows to structure and organize the product catalogue and easily select products that fit the client's needs.

Product selection

Process orders in the all-in-one window for product selection. When placing an order check the item's availability in stock, specify the number of items required and discuss each item with the customer.

Filtered search

Find the right products in the extensive catalog in a matter of seconds using filtered search and navigation. This type of approach will be well-known to online shoppers and allows you to easily navigate Sales Creatio.

Document flow automation

Document database

Easily manage documents using Sales Creatio. Track documents in the system, specify their type and link them to customers, opportunities, orders, etc. Attach scans and copies of documents, create new documents using the pre-set templates and populate them with data from the system. Save the history of approvals and chronology of activities for each document.

The screenshot displays the Sales Creatio 'Documents' interface. On the left, a sidebar contains navigation icons and a list of documents. The main area shows the details for document 324, including its number, type (Contract), status (Signed), and start date (4/26/2016). Below this, there are tabs for 'GENERAL INFORMATION', 'CONTRACT DETAILS', 'HISTORY', 'APPROVALS', and 'ATTACHMENTS AND NOTES'. The 'APPROVALS' tab is active, showing a table of approvals with columns for Approver, Status, Set By, and Set On. The table shows one approval by William Walker with a 'Positive' status, set on 14/10/2016 at 10:30. A note at the bottom of the table reads 'To proceed with contracting procedures'.

Document Number	Start date	Type	Status
322	4/26/2016	Contract	Signed
324	4/26/2016	Contract	Signed
335	4/30/2016	Contract	Draft
337	4/30/2016	Contract	Draft
338	4/30/2016	Contract	Draft

Approver	Status	Set By	Set On
William Walker	Positive	William Walker	14/10/2016 10:30

Document approval

Sales Creatio offers an automated document approval process. The system will notify the owner when the document is approved. You can also set up parallel or sequential approval flows, and the rules for approval delegation.

Related documents

Browse through all the specifications and addenda to the contract, using the related documents features. Sales Creatio allows you to set the relationship between documents and quickly jump from one document to the other.

Project management

Project management

Leverage Sales Creatio to efficiently manage both internal and external projects. Set project deadlines, manage costs, assign tasks to owners or teams.

The screenshot displays the Creatio Project Management interface. On the left is a sidebar with navigation icons. The main area shows a project titled 'Alphabusiness / Corporate Website Development' with a status of 'Completed' and owner 'John Best'. Below this, a 'Structure' tab is active, showing a hierarchical list of project tasks with their start/end dates and completion percentages.

Name	Start date	End date	Completion %
[-] Development	6/15/2016	7/12/2016	44.73
Main Page Development	6/15/2016	6/16/2016	100.00
[-] Catalogue Development	6/16/2016	7/11/2016	75.00
Catalogue Main Page	6/16/2016	6/23/2016	100.00
Catalogue Item Page	6/23/2016	7/3/2016	100.00
Search Form	7/3/2016	7/12/2016	33.33
Feedback Form Development	7/11/2016	7/13/2016	0.00
Testing	7/13/2016	7/18/2016	0.00
[-] Design	6/4/2016	6/15/2016	100.00
Creative Design	6/3/2016	6/4/2016	100.00
Home Page Design	6/4/2016	6/8/2016	100.00
Internal Page Design	6/8/2016	6/10/2016	100.00
Release	7/19/2016	7/25/2016	0.00

Project fulfillment

Manage planned and actual workload, time and cost to calculate efficiency of projects. The system helps to identify the project cost overruns, as well as reminds you of the upcoming deadlines.

Project analytics

Keep abreast of the project progress by analyzing and distributing workloads in real time. Customize dashboards to monitor and analyze key project metrics.

Mobile sales

Accounts and contacts	Access all the critical information about your customers from any mobile device. You can easily work with accounts and contacts: add new ones, write SMS or make calls right from the mobile app.
Activities and meetings	Plan your activities, meetings or calls using a smartphone or tablet. Save all your presentations in the knowledge base and show them during a customer meeting right from your mobile device. Update and add contact, account and opportunity information to the system as a result of the meeting for future references.
Opportunities	Manage your opportunities no matter where you are! Track a history of each deal, clarify details and plan your further steps using Sales Creatio mobile app.
Leads	Explore the prospect's needs and preferences, track status of the lead in real time.
Mobile feed	Use the Enterprise Social Network (ESN) on your smartphone or tablet to keep your fingers on the pulse of your business. Send messages linked to your contacts, accounts or activities. Share ideas and "like" and comment on any post in the feed.
Online and offline modes	The app can be used in both online and offline mode. Whichever option you choose, the needed data will be always at your fingertips.

Knowledge base

Knowledge base is an online library that stores articles, scripts, guidelines for new employees, document templates, presentations, answers to frequently asked questions, and any other useful materials. The knowledge base takes on features of social networks — users can like posts and share ideas and comments. This helps other users to quickly and easily find the most popular presentation or the most useful answer.

The screenshot displays the Creatio Knowledge Base interface. On the left, a sidebar lists various articles with their codes, types, and authors. The main area shows the details of the selected article, 'Integration with Email Providers', including its type (FAQ), author (Supervisor), and modification date (5/12/2016). The article content provides instructions on integrating email providers, mentioning the 'Email Providers List Setup' system operation and the 'Adding an Email Provider' section. The interface also includes a search bar at the top right and a user profile icon.

Article Title	Code	Type	Author
What to do when your laptop's tou...	11	FAQ	Supervisor
Field sales presentation	197-54	Rules and regulations	John Best
Integration with Email Providers	10	FAQ	John Best
New Presentation Style	198-02	Advertising materials	John Best
Magazine advertising	167-03	Advertising materials	John Best
Conducting Online Presentation	375-02	Rules and regulations	John Best
Headset or Microphone Doesn't Wo...	13	FAQ	Supervisor
Customer Satisfaction Survey	296-10	FAQ	John Best

Knowledge base structure

Segment articles in an extensive knowledge base to quickly find the most frequently used documents and assets. Adding tags (key words) and cross-linking the articles will make it even easier to find the record you need in the knowledge base.

