

Knowledge Playbooks

Playbooks are an automated form of rules or suggestions that are considered to be suitable for a particular activity or job.

1. Open Mattersmith and click on 'Knowledge' from the left hand menu:



2. On the Command pane click on the arrow in 'All Topics' to display the topic groups, keep using the arrows to expand the topics until the desired topic is available, then check the box.







- 3. This will automatically insert the corresponding 'Node' in the 'Instance' Pane (middle pane) and the 'playbook' if available in the Utility (right hand) pane.
- 4. Follow the decision tree via the Action and Question boxes in the Utility pane. Follow the decision tree to the end to ensure no points are missed.
- Attachments may be available which can be viewed at the bottom of the Command pane by clicking on the 'eye' icon or be downloaded to be copied and pasted into your document.

