Search of Confluence Pages

Why do you need it?

To make it even easier for customers to find what they need, you can suggest articles when they fill out a request. When customers create request on the Customer Portal, they see related pages that might help them troubleshoot their problem. In the above example, the Customer Portal uses the text in the Summary field to search the knowledge base and suggest matching articles:

Customer portal

Error

Summary*

How to Create Custom fields

Wiki articles

Link CRM **Custom Fields** to Jira **Custom Fields**

Adding CRM **Custom Fields** to Email Template

Automatic Amount **Custom fields**

Setting Up Issue **Custom Fields**

CRM Copy Transactions and Products **Custom Fields** Values to Issue

Create a Calendar

Description*

Drop files to attach, or browse.

Create   Cancel

Agents can also use page search when creating issues in Jira.

Create Issue   ⚙ Configure Fields ▾

Project* 🔵 DEVTOOL (DEV) ▾

Issue Type* ⬆ Improvement ▾ ⊙

Summary* How to create custom field

Wiki articles   **Custom field** – CRM Company
Custom Field – CRM Products Select / CRM Single Product Select
Custom field – CRM Contact
Custom field – CRM Property
Custom Field – CRM **Custom** Company
Custom field – CRM Transactions

Description*

Reporter* 🧑 Anastasia

Start typing to get a list of possible matches.

☐ Create another   **Create**   Cancel

Before you begin

1. Create a **Custom Field** type of **Wiki articles for Help Desk**

Select a Field Type   🔍 Wik

All	
Standard	**Wiki articles for Help Desk**
Advanced	Search for articles in Confluence

No field preview

🔒 Find more custom fields   Next   Cancel

2. Add this field to the **create** and **view screens**.

To set search articles

1. Go to **Help Desk setting > Confluence Integration;**

Applications   Projects   Issues   Add-ons   User management   Latest upgrade report   System   CRM   **HelpDesk**

HELPDESK ADMINISTRATION

Access
User Dashboard
Notifications
Inline Search
SLA
Customer Satisfaction
Related Issue
Customer Portal
Look & Feel
Comments
Audit
Confluence integration

Search of Confluence Pages

Exclude from the search

in × for × and × to × of × the × at × this × can × what ×
can't × do × does × did × why × how × when × jira ×
confluence × да ×

Max articles

6

Save

Confluence spaces for search articles

👤CRMEN
👤CFJ
👤HFJ

2. Fill the **Exclude from the search** field with words that will not participate from the page search;
3. Select the **maximum number of pages** that will be displayed in the search result;
4. Select the **Spaces** in which you want to search help articles