

Help Center Knowledge Base

Use this workbook to design and write a customer help center. Complete the article forms with verified product information, then copy each form into its own article. Keep learning, task instructions, explanation and lookup content distinct so customers can find the answer they need.

Complete bracketed fields with approved information. Duplicate modules and rows as needed; record the reason for any section marked not applicable.

Document [ID and revision] **Owner** [Role] **Scope** [Organization, site or product]

Effective date [Date] **Approval** [Controlled record] **Next review** [Date or trigger]

Getting started

Product overview record

Reader question	Product specific answer
What does the product help me achieve	[Outcome, intended user and product scope]
What do I need before starting	[Verified plan, role, access and prerequisites]
How do the main objects relate	[Concepts and relationship; concept article links]
Where should I go next	[Quick start, how-to and reference links]

Quick start article

First result	[A visible useful outcome]
Before you begin	[Minimum verified prerequisites]
Step 1	[First exact UI action and expected result]
Step 2	[Next minimum action and expected result]
Step 3	[Complete task and confirm the first result]
Learn more	[Full how-to, concept and troubleshooting links]

Beginner tutorial module

Lesson element	Complete for one end to end workflow
Goal and starting state	[Result and prepared environment]
Guided stages	[Actions, explanation and observable result by stage]
Practice and check	[Optional verified exercise and expected outcome]

How to guides

Customer task article

Use a verb-led title and one customer goal per article. Put any verified warning immediately before the affected step.

Task setup		Article content
Title and outcome		[Verb plus customer goal; answer in the opening sentence]
Requirements		[Product version, plan, role and prerequisites when applicable]
Starting location		[Exact navigation path and initial state]
Step	Exact action	Expected result
1	[Select exact label; one action]	[Visible state]
2	[Enter field or make decision]	[Accepted value or next state]
3	[Complete and verify]	[Success check and related next task]

Concepts

Explanation article

Concept element	Reader focused explanation
What it is and when to use it	[Direct explanation without task steps]
Parts and relationships	[Objects, lifecycle and boundaries]
Example or model	[Verified product example or diagram reference]
Related answers	[Task, reference and troubleshooting links]

Troubleshooting

Problem and solution article

Record the symptom in customer language. Distinguish an established cause from an unconfirmed possibility.

Issue record	Verified content
Search title and exact symptom	[Customer wording or exact error message]
Environment	[Feature, platform, version and relevant setting]
Resolution or workaround	[Direct answer; label a workaround explicitly]
Resolution steps	[Ordered actions with exact UI labels]
Verification	[How the customer knows the issue is resolved]
Cause and escalation	[Cause if verified; approved route if resolution fails]

Reference

Setting field or limit	Meaning and allowed value	Scope and related task
[Exact label]	[Description, default, unit and permitted values]	[Plan/version applicability; how-to link]
[Error code or permission]	[Exact meaning or access rule]	[Troubleshooting or task link]

Product glossary

Product term	Meaning for the customer	Related article
[Exact term or acronym]	[Concise verified definition]	[Concept or reference link]

FAQ

Customer question	Short direct answer	Full article
[Question answered by verified product information]	[Answer first, then necessary qualification]	[How-to or troubleshooting link]
[Question]	[Answer]	[Link]

Help center organization register

Category and section	Article and information type	Customer query and related links
Getting started	[Overview, quick start or tutorial]	[Search words and next task]
[Feature area]	[Task, concept, issue or reference]	[Customer language and canonical article]

Article review and maintenance

Article ID and version	Verification environment	Owner review and next trigger
[Article link and revision]	[Product version, role and test date]	[Responsible role and product-change trigger]

- ☐ The opening answers the customer's question or states the outcome.
- ☐ UI labels, steps, results and product limits were checked in the applicable version.
- ☐ Each article has one information type; duplicated answers link to a single canonical article.
- ☐ Links resolve and reusable content excludes customer identifiers and secrets.

Reviewer	Decision and date	Corrections and publication approval
[Role]	[Approved or returned]	[Actions and approval record]