

Docsie Free Template | Product

Help Guide Writing Standard

Use this template to universal standard for creating help guide content for any SaaS platform.

Template Metadata

Field	Details
Category	Product
Owner	[Team or owner]
Version	[Version number]
Effective Date	[Date]
Review Cycle	[Monthly / Quarterly / Annual / Event-based]
Status	[Draft / In Review / Approved]

Introduction

State the purpose: define expectations for page structure, content quality, visual consistency, terminology usage, and text formatting.

Item	Details	Owner	Status
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]
[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]

Notes

[Add context, assumptions, exceptions, evidence links, screenshots, calculations, or reviewer comments.]

Understanding Page Types

Explain why page type must be defined first. List page type categories (e.g., Feature Explanation Page). Each type carries its own structural requirements.

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[Item or requirement]	[Describe the relevant detail, evidence, or decision]	[Owner]	[Open / Complete]
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Feature Explanation Page Structure

Detail required components in order: 1. **Title** — format: [Feature Name] in [Platform Name] | [Component Name], sentence case 2. **Introductory Paragraph** — what, when, where (back-end), where (front-end) 3..

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Information Blocks

Define four block types with strict usage rules: - **Tip** — helpful but optional advice, best practices, shortcuts - **Note** — important facts, limitations, plan-based restrictions - **Definition** — clarify key.

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Content Guidelines

- Focus on non-obvious information; do not narrate self-evident UI - Use realistic data and examples (never Lorem Ipsum) - Stay focused on platform capabilities; link to third-party docs externally

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Visual Guidelines

- Consistent arrow styles for specific purposes - Close-up screenshots focusing on one action per visual

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AI Usage Guidelines

- Permitted: rough drafts, structural outlines, phrasing suggestions (with human review) - Not permitted: generating UI screenshots, feature mockups, or publishing without human verification

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Terminology Guidelines

Always use official platform terminology. Maintain a centrally managed glossary.

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Tone of Voice

- One idea per paragraph, max four lines - Break long explanations into subsections with descriptive sub-headers - Use bullet points (no nesting) - Active verbs, address user directly ("You can use...") -.

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Text Formatting

- Consistent heading and body fonts - Sentence case for titles and headings - Single link color (brand primary) for hyperlinks - **Bold** exclusively for UI labels and menu paths - *Italics* for emphasis on non-UI text.

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Review and Signoff

Document review conclusions, approvals, unresolved items, and next review date.

Role	Name	Date	Notes
Preparer	[Name]	[Date]	[Notes]
Reviewer	[Name]	[Date]	[Notes]
Approver	[Name]	[Date]	[Notes]