

Knowledge Base Article Templates

Four formats: how-to, troubleshooting, FAQ and reference. Copy the one that matches the reader's question.

Text in [square brackets] is a placeholder, and the gray lines under each heading explain the section. Delete both before you publish. Write one article per task, problem or question.

1. Article details

Fill these in for every article, whatever its type. Most help desks have fields for them; if yours does not, keep them in a note readers cannot see. The owner and the review date are what keep an article from going stale.

Article ID	[e.g. KB-ACC-014]	Type	[How-to / Troubleshooting / FAQ / Reference]
Product area	[Help center category]	Applies to	[Plans, roles, platforms]
Owner	[Role, then name]	Status	[Draft / Published / Archived]
Last reviewed	[YYYY-MM-DD]	Next review	[YYYY-MM-DD]

2. How-to article

Use for a task the reader wants to finish, one task per article. Title it with a verb, the way people search: Invite a teammate, not Team invitations. One action per step, with buttons and fields named exactly as they appear on screen, and what the reader should see after each step.

- **Title:** [Verb + object, for example: Export your invoices as a CSV file]
- **Summary:** [One or two sentences: what the reader will do and what they get]
- **Before you start:** [The role or permission, the plan, and anything to have ready]

Step	Do this	You should see
1		
2		
3		
4		
5		
6		

- **Result:** [What the reader has now, and what to do next]
- **If it did not work:** [Two or three common problems, each with its fix, or a link to the troubleshooting article]
- **Related articles:** [Two or three links]

3. Troubleshooting article

Use when something is going wrong. Start from what the reader sees, an error message or a symptom, not from the cause. Order the fixes from quickest and safest to slowest, and say when to stop and contact support.

- **Title:** [The symptom or the exact error text, for example: “Payment declined” when you upgrade]
- **Applies to:** [Product area, plan, browser or device, version]
- **Symptom:** [What the reader sees, in their words. Quote error messages exactly.]
- **Cause:** [Why it happens, in one or two sentences, if you know]

Try this	How	Fixed if

- **Still not fixed?** [Who to contact, and what to send: a screenshot, the time it happened, the account email]
- **Related articles:** [Two or three links]

4. FAQ article

Use for one question with a short answer. Put the answer in the first sentence, then the details. If the answer needs numbered steps, write a how-to article and link to it instead.

- **Question (the title):** [The question as customers ask it, for example: Can I change my billing date?]
- **Short answer:** [Yes, no, or the fact, in one or two sentences]
- **Details:** [Conditions, exceptions and an example, in a short paragraph or list]
- **Next step:** [A link to the how-to article that does the task, if there is one]
- **Related questions:** [Two or three links]

5. Reference article

Use for facts readers look up rather than read: settings, limits, roles and permissions, fields, shortcuts, terms. Put them in a table and keep tasks in how-to articles.

- **Title:** [A noun phrase, for example: Roles and permissions]
- **Overview:** [One or two sentences: what the table covers and who it is for]

Item	What it does	Default or limit	Who can change it

- **Notes:** [Exceptions, plan differences, anything that changed recently]
- **Related how-to articles:** [Two or three links]

6. Before you publish

Check every article against this list before it goes live. An article that fails one line usually fails a reader.

- The title uses the words readers type into search, not internal feature names.
- The article covers one task, one problem or one question.
- The answer or the result is in the first two sentences.
- Every step starts with a verb and names buttons and fields exactly as the screen shows them.
- Screenshots are cropped to the part that matters and show no customer or personal data.
- Someone who has never done the task followed the article without help.
- The article has an owner and a next review date, and links to its related articles.

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