

STYLE GUIDE - CREATING KNOWLEDGE ARTICLES

This document is to help create Knowledge Articles using Salesforce.com (SFDC). The style guide provides best practices and instructions to create top quality articles for our global audience.

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Article Quality Checklist

Use the checklist as a reference of key factors to remember when creating knowledge articles.

Note: These guidelines apply to every article section; when editing or creating a new article.

- ✓ Uniqueness - duplicate content is not found in another knowledge article:
ALWAYS SEARCH FIRST
- ✓ Completeness - someone unfamiliar with Pitney Bowes (imagine a new employee or client) can use the article from beginning to end to effectively and clearly solve their question
- ✓ Uniqueness - the article is precise; it covers only one topic or fixes one issue, using the appropriate template: 'How-to' or 'Troubleshooting'
- ✓ Reusability - the content, including images, does not include Personally Identifying Information (PII) or any details that could potentially distinguish a specific person, corporation, or entity
- ✓ Clarity - the Title distinctly reflects the information in the knowledge article
- ✓ Metadata - all appropriate and necessary Metadata tags are correctly applied
- ✓ Clarity - spellcheck every section of the article

Writing Style – Voice & Language

- Write using a clear and smart tone of voice, as if you were explaining the information directly to the client
- Use action words stated in the present tense
Correct example: Type the new address into the form field, then click OK
- Avoid using 'Please' and 'Thank you'; 'Unfortunately' or 'We don't recommend...'
Incorrect example: Please keep clicking the down arrow until you can see Update
Correct example: Confirm your meter completed the update
- Avoid extra phrases, such as: 'the client says...' or 'the next thing to try could be...'

SIMPLIFY the complicated language

- Write concise titles, statements and instructions
- Prioritize information by providing critical or newly-updated information at the beginning of your article
- Stay organized. Start with a brief summary or introduction statement, then include detailed guidance or step-by-step (1, 2, 3) instructions
- Information is written so it can be easily scanned by the reader - use bulleted lists to break up lengthy information into smaller sections
- Include only necessary facts

Use CONSISTENT 'closing statements' to complete or 'end' the article

At the end of an article, use consistent "**Contact customer service**" text, when applicable, after a step-action sequence:

Example 1: If the issue is unresolved after following these steps, contact customer support for further assistance.

Example 2: Contact customer support for assistance if troubleshooting did not fix the issue.

Grammar

- Use short, familiar words that are easy to understand by our global audience
- Avoid jargon, slang, and using contractions - e.g., *isn't*, *don't*, *wouldn't*
- Avoid ending sentences with a preposition - e.g., *to*, *at*, *from*, *etc.*
- Avoid on-screen directions. For example, "see below for steps" or "in the picture above". The position of certain text may move on a page when published; or if video is added, or if one section is edited, making the reference no longer "above" or "below".
Correct examples: Follow these steps to fix the error
Select your meter from the following list
- Acronyms: use **only after** the initial instance of the term/phrase is completely spelled out, followed by identifying the acronym in parenthesis. Note: after the initial reference, the acronym can be used and the term does not need to be spelled out again.
Correct examples: Subject Matter Expert (SME)
PC Meter Connect™ (PCMC)
- Punctuation: include two spaces after a colon. Use one space after a period or comma.

CAPITALIZATION

- The first letter of sentences and proper names begin with a capital letter.
Note: exceptions include product names that use all lowercase; e.g., mailstation2™.
- **Article Titles:** use sentence case and **NO punctuation**. Capitalize only the first word and proper nouns (i.e., names of products, if the product name *IS* capitalized)
 - * **TIP:** [KCS Title Best Practices](#) has detailed instructions for creating an Article Title.

Hyperlinks

- Verify the link works; functions correctly and directs to the intended webpage
- Avoid phrases like “Click Here” as the hyperlink text
Incorrect example: Click here <http://www.xyz.com> for rate change info.
Correct example: Learn more by visiting [Rates and Software Updates](#).
- Internal URLs (pitneybowes.com) open in same window or new window, as appropriate
- Links to external webpages (USPS.com) should open in a New Window
- * **TIP:** apply HTML to open a page in a New Window. Add **target=“blank”** after the URL.
Example (as shown in Source): `<href=“https://www.canadapost.ca” target=“blank”>`

Common Terms (and examples as shown within the content)

- **username:** write as one word and lowercase (unless first word of sentence)
- **website:** one word, lowercase (unless first word of sentence, then use capital W)
- **Web:** when using the short form of World Wide Web, always capitalize the ‘W’. When using with another word, write as separate words and capitalize the ‘W’: Web page.
- **Internet:** always capitalize, even if mentioned in the middle of a sentence
- **Email/email:** not hyphenated
- **Sign in:** preferred use when referring to accessing a system. Lessen use of: ‘Log in’
- **Click:** use ‘click’ or ‘select’, rather than ‘click on’, ‘push’ or ‘hit’
- **Drop-down, double-click, right-click** – not ‘dropdown’ or ‘right click’

Text Formatting

WYSIWYG – an acronym for “What You See Is What You Get.” WYSIWYG toolbar allows you to format your article using similar functions used in Microsoft Word.



Click **Source** to directly enter or modify content in the HTML view. Once entered, click Source again to return to Editor view. Use the toolbar to add bullets or numbered steps.

FONT

When creating articles in SFDC, type directly into the field, or paste as plain text from Notepad only. Do not paste text from Word, an email, or in any format except plain text—extra code is added and will ruin the display when published. The preferred typeface is formatted automatically. The following describes the default typeface used in SFDC:

- Font size: shown as Normal setting on the WYSIWYG editor
- Font color: black is default

Font best practices:

- Apply emphasize using **bold** or *italics*
- Avoid using red, blue or any color text as it conflicts with pitneybowes.com and web publishing standards
- Avoid underlining article text. Hyperlinks are automatically underlined, depending on browser settings. No other text should be underlined.

Formatting Client Step Actions

It is important instructions are written clearly for the client reading an article to resolve an issue and/or troubleshoot their task. Write instructions so any module, button, screen messages replicate exactly what the client is seeing.

For consistent format of steps actions, there are two groups:

1. Meter/mailling system: mailstation™, mailstation2™, DM series, Connect+® series
2. Software/web-based application: SendSuite™ Tracking, ConnectRight™ Mailer, Arrival™

Write instructions based on the group (i.e., type of product):

- 1a. Write meter screen prompts or message in *italics*. Write an action in **bold**.

Example: The meter will prompt, *Print Funds Report*. Press the **Yes/Enter** button to print a report. Press **No** if you do not want a report. You will return to the *Home* screen.

- 2a. Use **bold** for screen display, modules, and all actions

Example: Follow these steps to retrieve the device serial number:

1. Power on and unlock your device
2. Locate and tap **Settings**
3. Scroll to the bottom of the screen. Locate and tap **About Device**

* **Reminder:** SPELL CHECK EVERY ARTICLE SECTION – including Title, Summary & Details

Trademarks

Include the correct registered mark or symbol **with the product name on the initial instance**. You do not need to add the mark or symbol again in your article.

- Avoid using trademark symbols in the article title
- If the product(s) are not mentioned in the article resolution, add the correct legal mark in the Environment Details field, ensuring the correct trademark symbol associated with the product(s) appear on the page
- Use HTML code to create and format trademark symbols in the Source tab:

™ – creates trademark symbol: ™

® – creates trademark symbol: ®

<sup> – creates superscript: **^{MC}** ^{MC}

Spacing

Ensure the text begins at the very top of the *Article Details* field

- Avoid extraneous spaces between paragraphs when entering information
- **Preview** your article when editing and after you save your draft to make sure the page formatting appears correctly

Preview

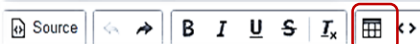
ALWAYS review your work. Save and select the **Preview** button located in the gray bar at the top of the edit page. Your article draft will appear in a new window.

Preview your article as part of article creation process to confirm content is displaying properly. Preview your draft *before* submitting to the Approve



Tables

Simple tables consisting of two columns are used to correlate content by creating a basic chart or table.

1. Select the table icon from the WYSIWYG toolbar: 
2. In the Table Properties window, enter '2' Columns and the number of Rows

Avoid using complex tables in your articles. This allows the content to better display across various devices: mobile phones, tablets, computer monitors.

Note: *Exceptions and reproduction of table composites are developed as needed.*
Contact the Digital Support Team for assistance with creating tables in your article.

Bullets & Lists

- Apply ordered/numbered (1, 2, 3) and bulleted lists using the WYSIWYG icons
- To change the type of numbered list, for example, a sub-list within the steps:
 1. Begin your numbered list using the '1,2' icon



You may be able to clear the error by simply restarting your meter and getting a download. Here are the steps to follow for a sa

1. Unplug the power cord, wait one to three minutes
2. Plug the power cord back in, ensuring that it is plugged directly into a wall outlet
3. Press Options

2. Within the list text field, right-click and select **Numbered List Properties**
 3. Select the appropriate sub-bullet convention (i.e., lower alpha: a, b, c)
- Bullets: Use bulleted statements instead of long paragraphs when possible
 - Avoid using a period when ending a bulleted statement or single step. Use a period at the end if there is more than one sentence in the step or statement.
 - Use the standard bullet type: closed disc •
 - Numbered [ordered] steps (1, 2, 3) should be created for directional instructions; i.e., [Client step actions](#)
- * **BE THOROUGH:** include *every single step* to successfully fix an issue or complete a task. If you click **OK**, add it as a step!

Image & File Name Tips

- Images are used to enhance content; to help the client understand the information
- Specific icons can be used to help direct clients to an important next step

Example:



- Lessen use of icons for emphasis
Example of an alternative: **IMPORTANT** – written in all caps and bold
- Save images files as: .png or .jpg
- Resize appropriately (*Note: maximum file size: 750KB*)
- File names: no spacing between words
- File name should be descriptive, but never include personal information
- Use all lowercase type and dash (-) to separate parts of a naming convention. String together with NO special characters or spaces:

Poor Example: Logo 1 Bigger.gif

Better Example: main-logo-support-home.png

Article Types

There are **TWO** types used to categorize a knowledge article: How-To and Troubleshooting.

Review **KCS Job Aids**: [Article Structure](#) and [Article Picklists](#) – both containing specific details.

Article Fields: the following fields impact the **search** and historical details about an article

Summary Format

- The Summary is a short description or purpose statement about your article; typically one to two sentences in length. Even if it is one sentence, use a period at the end of the Summary statement.
- The Summary will display in search engine results (e.g., Google). It will also list on a Product Detail page underneath the Article Title.
- The Summary should include a brief description of **all related products**.

Example: Contains information about how to fix error code HI123 on the mailstation or mailstation2.

Environment Details Format

- Environment Details field is where you list **ALL products related to your article topic**
- Because the title can include only two products (maximum), this field is important to add all other products related to the knowledge article
- Format - **always** begin this section with the following information:
“Products affected: (list all related products and include product trademark)”

Example:

Products affected: DM100®i, DM125™, DM200L™, DM225™, DM300c™, DM400c™, DM450c™, DM475™

- After listing “Products affected”, include any additional Environment Details; specify information about the article if it applies to any of the following areas:
 - Technology/Digital system
 - Product version
 - Group of employees or clients
 - Expiration date
 - Multiple products
- Use the WYSIWYG to format the information in this field as needed

Version Comments

- Use the *Version Comments* field to make a record of the changes you made so the next person to edit or approve the article knows what has changed
- If an article is to remain in ‘Archive’ status (or UNPUBLISHED), note reason why and who requested the article be removed from external/public view. (e.g., “Jan 1 2015 - Archived as issue is resolved with new version; per Jon Smith”)
- Include:
 - Date change made
 - Include your universal ID so others are aware who made the change
 - Brief description of change(s); why it changed; key factors for next reviewer

Example:

08/20/15 jt098tj added keywords and updated the instructions with a step (#8) to check the software version.

IMPORTANT: Read ***Version Comments*** before taking ANY action on an article.

Some articles, notably Rate Change and Client Service instructions, ask you contact a particular SME before making *any* edits to the article content. These notes can contain very specific information and should be read and maintained as a best practice.

KCS Job Aids on Salesforce – KCS Chatter

For detailed assistance with **Definitions**, **Picklists**, **Metadata**, and **Article Structure**, refer to: [Files Shared with Knowledge & KCS](#)

- * **TIP:** To locate KCS Job Aids, including the KCS Style Guide, sign into salesforce. In the upper-left drop-down menu, select **Chatter**. Next, select the links: **Groups > Knowledge & KCS > Group Files** – current KCS Job Aids are posted and updated regularly.

Document changes or questions, contact: Marken Bredholt, Digital Content Producer

Appendix A – Cause field standard statements

The **Cause** field is included in the Troubleshooting template. The cause is the underlying reason why there is a problem or issue occurring in the first case. This field is visible when the article is published in all channels, so populating the Cause with content - so it does not appear blank - is key for articles visible internally *AND* published externally for our global clients.

This section lists sample, generic Cause statements for various issues for mailing machines.

Note: if the article is about a specific product, i.e., other equipment, change the word “meter” to the appropriate type of equipment (e.g., folder, inserter, or printer).

Printer issues (Example: PCMC timeout error)

1. Your meter has detected an error with the internal printer.
2. A malfunction has occurred with the internal printer.
3. There is a problem with the printer.

Connection issues (Example: unable to resolve DNS host)

1. The meter was unable to connect to the Pitney Bowes Data Center.
2. The connection to Pitney Bowes has failed or dropped.
3. Data Center is busy.

Feeding/jamming issues (Example: timeout at transport sensor)

1. The meter has jammed.
2. The meter has detected a jam
3. The meter is not feeding correctly.

Broad software malfunctions/Other/Miscellaneous faults:

1. The internal meter software has malfunctioned.
2. An internal component has failed.
3. The meter has detected an internal fault.
4. A failure with an internal component is preventing normal operation of the meter.