Help content that ends in a result.

A fictional SaaS knowledge-base sample showing how a loose internal note becomes a task-focused customer article.

> The workflow organizes prerequisites, interface labels, numbered actions, expected results, and failure paths—while returning unknown product behavior to the client as questions.

What the client receives

Publishable article
Structured around the user's goal

Product questions
Unknowns isolated, not invented

QA checklist
Labels, paths, and outcome verified

BEFORE AND AFTER

Export a report as a CSV file

Internal note supplied by client

Reports can be downloaded from dashboard by export. Go into the report and use the upper button, choose CSV and it downloads. If there is lots of data it can take awhile and you might not see it right away. Exports include current filters. Basic people maybe cannot export. If it fails try again or check browser downloads.

Customer-facing knowledge-base draft

Export a report as CSV

Download the rows currently shown in a report so you can review them in a spreadsheet.

Before you begin

- Open the report you want to export.
- Apply the date range and filters you want included.
- Confirm that your role includes export permission.

Export the report

1. Select **Export** in the upper-right corner.
2. Select **CSV**.
3. Wait for the export to finish.
4. Open your browser's Downloads list and select the file.

Expected result: The CSV contains the report rows that match the filters active when you started the export.

Large reports: Keep the report open while the export is processing. The client should confirm whether Northstar Reports also sends an in-app or email notification.

If the file does not download

1. Check whether your browser blocked the download.
2. Confirm that your role includes export permission.
3. Try a smaller date range.
4. If the export still fails, record the report name, date range, and error message before contacting support.

The rewrite preserves the supplied behavior but does not claim an exact processing time, plan restriction, notification method, or file-naming rule that the source did not establish.

Questions returned to the product owner

Source statement	What is unresolved	Confirmation needed
“upper button”	The exact control label and position may vary by view or screen size.	Approved UI label, location, and mobile behavior
“Basic people maybe cannot export”	This could refer to plan, workspace role, report ownership, or a feature flag.	Exact permission and plan requirements
“lots of data” / “take awhile”	No threshold, maximum size, processing-time range, or timeout behavior is supplied.	Supported limits and normal large-export behavior
“might not see it right away”	The product's completion signal is unknown.	Download, in-app notification, email, or exports-page behavior
“try again”	Retrying may duplicate a queued export or hide a service incident.	Approved retry interval and escalation path

Acceptance check before publication

Product accuracy

- Every visible control label matches the current interface.
- A test export preserves the selected filters.
- Permission and plan requirements are confirmed.
- Large-export behavior and completion signals are verified.

User completion

- The title states the user goal.
- Prerequisites appear before the actions.
- Each step contains one observable action.
- The expected result and useful failure evidence are explicit.

> **Evidence boundary:** Final interface validation requires client-approved product access, screenshots, or a recorded walkthrough. Drafting from notes alone cannot prove that a click path works.