Documentation Style guide

What's the Purpose of this Style Guide?

This document works to unify technical writing for our organization through a set of rules and guidelines. These rules should help the author to focus on the content of what they're writing and not have to worry as much about stylistic items.

Who is this Guide for?

This guide is primarily meant for anyone writing content that will be hosted on our knowledgebase. That said, it's our hope that this guide is written in such a way that it can be applied to any piece of user-facing content produced by our organization.

Why is it Important to have a Style Guide?

Being able to effectively communicate is key to our organization's success. Without this we lose the ability to assist, and thus retain, our clients. In order for our content to be effective it needs to be all of the following*:

- Accurate
- Complete
- Usable
- Clear
- Consistent

Many of these aspects are achieved through adequate research, thoroughness in writing, and having others review your work. However, items like usability, clarity, and consistency can only be achieved by making sure our content adheres to an agreed upon set of rules. This style guide collects these rules in one easy-to-access location.

What if I Can't Find Something in the Style Guide?

The two main sources used to draft this guide were *The Chicago Manual of Style* (because of its wide acceptance and scholarly reputation) and the Salesforce Style Guide for Documentation and User Interface Text (because our platform runs on Salesforce, they make good content, and it helps our users if our content feels familiar). If you cannot find something in this guide and require an immediate ruling, please refer to either of those resources.

> ⓘ Grammarly is also a great resource for easy-to-read guides on everything writing.

Additionally, this guide is meant to be a living document. It's our hope that it will continue to improve as readers submit feedback and as the scope of our organization's content expands. If you have any questions or recommendations, please reach out to Matt Watson (mwatso88@gmail.com).

General Reminders

When writing for our organization, remember the following:

- Consider your audience when writing.
- Avoid using jargon, slang, idioms, or humor.
- Write in the active voice, and avoid passive voice where possible.
- Limit sentence and paragraph length and break up (or "chunk") your information to make it easier to read.
- Write evergreen content when possible.

- Our organization's products are constantly evolving. While it might not be reasonable for GIFs to last forever, it's certainly possible to create less work for ourselves by writing in a way that can persist across multiple versions of software.

- If you can't be sure, at least be consistent.

  - The English language is complicated; and the rules surrounding it change often. If you're unsure how to write or format something, and you've checked this style guide first, at the very least make sure that you're being consistent in your writing.

Tone, Voice, and Readability

Tone

Our organization's tone is meant to be semi-formal and approachable. By this we mean we're clear and direct when writing for our users, but not at the cost of coming across as stuffy or standoffish. We understand that it can be difficult to find this balance. If you're not sure if a piece of writing is doing a good job of capturing our tone, reach out to Matt Watson (mwatso88@gmail.com) for help.

Voice

Writing in the passive voice is weak and sometimes confusing. You can tell if a sentence is written in the passive voice by looking at the subject and how it's connected to the action in the sentence. In the active voice, the subject is performing the action. For example, "The dog bit the boy". In the passive voice, the subject of the sentence receives the action. For example, "The boy was bitten by the dog". When possible, try and write in the active voice.

While we want to use as little passive language as possible, a certain amount is acceptable (or nearly impossible to get rid of). As a general rule of thumb, here at our organization we shoot for the following passive language usage in our writing:

- 10% passive language or less.

Microsoft Word comes equipped with the ability to measure passive voice usage in a document. It's suggested that you enable this detection in your settings.

Readability

Our organization's products are often complex, powerful pieces of software. Depending on your background, it can be difficult to jump in and get started with them. We want to write our articles in such a way that they're easy to follow for a wide variety of reading and experience levels. One way we can do this is by measuring the readability of our content, and making sure that it's at a certain level (or readability score).

Simply put, readability is how easy it is to read something. Readability is usually measured by things like:

- How complex is the language of a piece of writing?
- How adequately broken up is a piece of writing?

There are several ways of measuring readability, but two of the most common are by measuring the Flesch Reading ease and Flesch-Kincaid reading levels. (It's also convenient that Microsoft Word comes with tools built-in that help us measure these levels.)

It's been found that the average person reads at about a 9th grade reading level. As such, we want to shoot for a readability score that's around that level. When writing for our organization, check your readability score and shoot for the follow scores:

- **Flesch Reading-Ease Goal**: 60 or higher.
- **Flesch-Kincaid Grade Level**: 8 or lower

Here are some ways that you can boost the readability of your writing:

- Make sure that your sentences aren't too long. A good goal to shoot for is sentences that are between **20-25 words long**.
- Try to keep your paragraphs to a reasonable length. Ideally, paragraphs shouldn't be longer than **five sentences**.
- Avoid (where possible) using jargon, slang, idioms, or humor.
- Write in the active voice.

Capitalization

Capitalization (or case) is going to change depending on what you're writing. As a quick reminder:

- This is an example of sentence case.
  - Only the first letter of the sentence is capitalized.
  - Use this for sentences.
- This Sentence is in Title Case.
  - The first letter of all major words is capitalized; minor words (articles, prepositions, and conjunctions) are not.
  - Use Title Case for all article headings.
- THIS SENTENCE IS IN ALL CAPS.
  - All letters are capitalized.
  - Sometimes used for emphasis.

- We generally want to avoid doing this.

Capitalize the first letter for all proper nouns. As a reminder, a proper noun is a specific name for a person, place, or thing.

Also capitalize all UI elements. For example, "Inspect the Matter object."

Punctuation and Grammar

Acronyms and Abbreviations

These terms are often used interchangeably. **Acronyms** are formed using the first letter of each word in a phrase and are pronounced as a word. For example, NASA, NATO, and UNICEF.

Abbreviations are shortened or contracted forms of words or phrases. You pronounce these by saying each letter. For example, FBI, CIA, and CQC.

Always spell out a term or phrase before using its acronym.

Apostrophes

There are three reasons to use an apostrophe:

- To show possession.
  - For example, "The lawyer's files."
- To form contractions.
  - For example, "Can't" or "Won't".
- To form a plural.
  - For example, "ABC's" or "1's and 2's".
  - This shouldn't be done to form plural proper nouns, acronyms, and numerals.

Commas

Commas are a versatile but often misused punctuation mark. You can use them to:

- Show a brief pause in a sentence.
- To set off an inessential phrase in a sentence.
- To show a list of items.

You should avoid using a comma if:

- Your list only includes two items.
- The comma would separate the subject of your sentence from the action it is performing.
- Before two items or independent clauses joined by *and*, *but*, or *or*.

- This usually indicates a comma splice or compound sentence. In these instances, you should look to use a colon, semicolon, conjunction, or em dash.

If a sentence starts with an introductory word you can add a comma after that word. Some examples of introductory words are: however, yet, finally, and basically.

When listing three or more objects use serial/Oxford commas.

> ℹ️ For more guidance on using semicolons, check out this great guide by [Grammarly](#).

Contractions

A contraction is a shortened word (or several words) that uses an apostrophe in place of the omitted letters. For example, "we're" (we are) and "they're" (they are) are contractions.

As part of our tone, we allow limited usage of contraction in our content. While contractions can be a great way to relax your writing and make you seem more approachable, they should be used in moderation. Use contractions where it seems appropriate, but not every chance you get.

Dashes and Hyphens

Hyphens, en dashes, and em dashes are three similar pieces of punctuation with very different usages.

- The hyphen (-) is the smallest mark. It has its own key on the keyboard (next to the 0 on US keyboards). It's used for: hyphenating words, linking prefixes to words, and in numbers.
- The en dash (–) is slightly longer than the hyphen. To insert an en dash on a Mac, click the **option** key plus the **hyphen** key. It's used to: express periods of time, to indicate ranges of numbers, and in displaying scores.
- The em dash (—) is the longest of the three. To insert an em dash on a Mac, click the **option**+**shift**+**hyphen** keys together. These are used to: show breaks in sentences, to set off important words in a sentence, or to create emphasis.

Do not add spaces around dashes unless they're used before a quote.

Pronouns

Writing in the active voice should prevent the need to use gender-specific pronouns.

However, when the need should arise, it's best to use the indefinite pronouns their/them.

Quotation Marks (Single & Double)

Use double quotation marks when directly quoting someone. For example, "Do, or do not, there is no try." Also use double quotation marks whenever instructing users to type something. For example, Type "Delete" in the box provided.

Single quotation marks are used to show quotes-within-quotes. For example, "Yoda told me, 'Do, or do not, there is no try.' before I left Dagobah."

Semicolons

Semicolons are a useful but often misused punctuation mark. Because of this, as a simple rule, we try and avoid using them in user-facing documentation. If you need guidance on using semicolons, just remember that they're used in these two scenarios:

- To link two independent clauses without using a conjunction.
- Use to separate items within lists that also include commas. For example, "I've lived in Austin, Texas; Arlington, Virginia; Orlando, Florida; and Raleigh, North Carolina.

Remember that semicolons are not interchangeable for periods or commas (although they look like a combination of the two). Instead, they exist somewhere in between. Stronger than a comma, but not quite as final as a period.

> ⓘ For more guidance on using semicolons, check out this great guide by [Grammarly](#).

Text Formatting

Lists

Bulleted lists are used to present related items. A bulleted list should always be preceded by an introductory sentence that ends in a colon. If a bulleted item is a complete sentence end it with a period. Below is an example of a bulleted list:

- Apples
- Oranges
- Pears

Lists that are meant to be followed in-order should be numbered. Keep in mind that numbered lists that are too long tend to be intimidating. Because of this, it's best to keep numbered lists under 10 steps. If the process you're writing is longer than 10 steps, consider breaking it up into smaller sections. Below is an example of a numbered list:

1. Open a new browser.
2. Enter the website in the **search bar**.
3. Click **enter**.

Some additional reminders about lists:

- Try and keep items in a list parallel in length.
- When introducing a list avoid mentioning how many items are in the list.

Headings

Use the appropriate heading depending on what you're writing. If you plan to use a heading that's not listed below, chances are it's not advised.

Heading Example	Usage
# Heading 1	Used only once, for the title.
## Heading 2	Used for major sections within an article.
### Heading 3	Used for sub-sections under larger sections.
Heading 4	Can be used for even smaller sections. However, we generally try to avoid being this granular and as such you shouldn't really need to use this heading.
Bold text	Used for column labels in tables. Try to avoid using this for section headings.

Bolding, Italics, and Underlining

User interface (UI) elements should be bolded when instructing a user to interact with them. For example, "Don't forget to click **Save** when you're done." It's not necessary to bold the punctuation next to bolded terms. We also occasionally bold items to show emphasis. This is fine as long as it's done sparingly.

Italics should only be used in quotations or in other special circumstances.

Avoid underlining text. If something becomes underlined when adding a hyperlink that's OK.

Fonts, Text Sizing, and Spacing

We use the Lato typeface set to 18-point on the Help site.

Only use one space after periods, commas, or question marks.

Monospace code examples

Use a monospaced font when presenting code examples. This can easily be done in Zendesk by highlighting your code example, and clicking the **Code block** icon on the Zendesk toolbar.

Numbers in Text

When writing numbers, try and spell out numbers one through nine. For the number 10 and above it's usually OK to use numerals. For example, "Select numbers two through four." "Did you call number 12?"

URLs

Avoid pasting full URLs (For example, https://www.google.com/) into articles whenever possible. Full URLs look sloppy and don't tend to be that helpful to readers anyway. Instead, add the URL as a hyperlink to an appropriate phrase. For example, "Don't know? [Google it](#)!".

Dates

To be as clear as possible, we recommend that you format dates as "Month D, Yr". For example, April 2, 2021.

It's also acceptable to format dates as "MM/DD/YYYY" but this is a little less clear (especially for readers outside the US.

Accessibility

We strive to produce content that can be used by as large an audience as possible. To do this, we need to be mindful of those who might require assistance in consuming our content. Some things to remember when producing content for our organization:

- Add alt-text descriptions to any images included in our articles.
- Avoid using GIFs when possible.
  - Text-readers often struggle to process GIFs.
  - GIFs cannot be paused or rewound.
  - It's often difficult for those with poor internet (or mobile users) to access GIFs.

Common Mistakes / Phrases to Avoid or to use with Caution

Try and be mindful of these common mistakes and often misused terms/phrases:

Term/Phrase	Insight
"Login" vs. "Log in"	- Login is a noun referring to someone's user ID and password. "Log in" is a multi-word verb referring to the action of entering your credentials to access something.

Simply, easily, obviously, just	• These phrases assume the reader's aptitude and have the tendency to alienate. • While something may seem easy to you, the same may not be true for your reader. Your writing should take this into consideration.
"Then" vs. "Than"	• "Then" is used when time is involved. 　○ For example, "Enter your password then click enter." • "Than" is used when comparing things. 　○ For example, "I'd rather use you product than anything else"
"affect" vs. "effect"	• "Affect" tends to be used as a verb, and it usually means to change. • "Effect" is usually used as a noun, and is the result of a change. 　○ For example, "The update has a positive effect on the user experience."
It appears, from what we can tell, if we understand correctly	• Avoid these and other indirect phrases. They make it seem like we're unsure in our writing.
Whitelist/Blacklist, Master/Slave, [More terms to be added]	• These are antiquated (and potentially offensive) technical terms that should no longer be used.
[Salesforce jargon]	• Be mindful of your audience.

Modal, [More terms to be added]	• These are jargony terms that tend to crop up in internal communication. Try to avoid using them in user-facing documentation.
Press/Push vs. Click/Expand	• When possible, it's best to use the more specific term "Click". • Similarly, "Expand" can be used to describe interactions with drop-downs and pick-lists.
They're, Their, There	• **There** means the opposite of here; "at that place." • **Their** means "belongs to them." • **They're** is a contraction of "they are" or "they were." *Source*
You're vs. Your	• You're: A contractions of "you" and "are". • Your: A possessive adjective meaning something that someone owns or possesses.

Latin Phrases to Avoid

Some Latin terms and phrases have worked their way into our everyday writing and speech. However, sometimes these phrases can be a bit confusing (or used incorrectly). Because of this we've decided to avoid using the following phrases:

Term/Phrase	Suggested Replacement
etc.	and others, and so on
i.e.	In other words
e.g.	for example