Finalsite

Support Style Guide

Introduction

Finalsite's Support team members write a **lot**. Written ticket responses are our single most common method of communicating with clients. Beyond that, Knowledge Base articles, blogs, and other forms of written communication make up a significant portion of how we keep in touch with our clients.

This Style Guide is intended to help Support staff write clearly and concisely in order to make technical concepts easier to understand and best meet our clients' needs.

In addition, this document spells out the conventions for common terms and helpful things to keep in mind as you write for specific client audiences.

Goals of communications from Support

Education

Teach users to accomplish a specific task, resolve a problem, or configure software to accomplish a goal. Provide the right information the first time, and then get out of the user's way.

Empowerment

Provide context and details about software features that clients are not currently using that can make their job more efficient.

!!!Do not add extraneous or unnecessary complications. !!!

Reference

Make accessible up-to-date information that is not needed frequently but is occasionally required to plan a task or answer a question (e.g., "What's the maximum file size that can be uploaded?")

Service

Demonstrate excellent customer service to make sure our clients can do the work they need to do.

Style

Clarity

Clear writing requires clear thinking. Precision is a cornerstone of technical writing, but accuracy doesn't count for much if the message is hard to understand.

Understand what you want to say before you start composing your document. If it helps, jot down notes or a basic outline so that you remember everything you want to say before you begin the task of writing. In the words of [The Economist Style Guide](): **"Think what you want to say, then say it as simply as possible."**

- Make sure that your explanation and your directives are easy to follow.

- Don't skip back and forth between multiple configuration screens or other locations in the software (unless that's required by the procedure you're explaining).

- Group tasks in the same location together so that they can be done at the same time.

- To help the reader understand a procedure, explain the entire process in general terms first before moving on to the specific steps.

- When describing a sequence of steps for clients to take, use a numbered list.

Audience

Everything that's written is written for a specific audience. Whether it's a large collection of people or a single reader, tailoring the message to the audience is an important way to make sure a document is effective.

Figure out at the start what you need to cover and what can be left out. Use the information the client has given you, as well as the information we have on file from previous interactions with them, to get a sense of how much explanation is required to ensure they fully understand the problem and its solution. Consider:

- **Experience level.** Is the question coming from a newly launched client or a client converting from another platform? Is an article geared toward advanced users or new admins?

- **Goals.** What is the user trying to accomplish? What do they need to get from where they are now to where they need to be?

Listen to what clients are saying

- Our understanding of the software alone may not be sufficient to help clients solve their problems. Listening to understand their problem is critical.

- Clients can't be expected to know all our lingo. They'll have their own terms for some of the tools they use, either ones they've made up or ones they've carried over from their previous website provider.

- Use context to double-check your understanding of the client's problem. If their question seems to make no sense, try to figure out what other module or feature they might be talking about.

Tone and voice

Respect

Appreciate the client's time, knowledge and expertise, even though it's different from your own.

<div align="center">

❗❗❗ **Clients are experts in how their schools work.** ❗❗❗

</div>

Every communication should start with the understanding that clients are paying us their attention - and they deserve to receive something they value in return. We should never ask clients to pay attention to us without making it worth their while.

Positivity

Finalsite Support is a unique service in the market. Our ability to provide direct, effective, and impactful support carries a lot of weight and is something to take seriously and to be proud of. This should be conveyed in all our interactions with clients, written or otherwise.

Casual communication

Some long-time clients become close enough that casual communication in tickets becomes expected, and a strictly business tone starts to sound odd. Remember that with the latitude to be more personal comes responsibility to be more diligent. Use judgment and stay professional.

Emoji are okay if used - **sparingly** - to further the goals of the communication. Think of them as the nonverbal component of a conversation. It's notoriously difficult to convey emotion with plain text. Memes and emoji are two of the most common ways that the internet has come up with to fill in the gap that's left by not having a nonverbal communication channel alongside text.

Most of the writing that Finalsite does is not particularly emotional, however. There simply isn't much opportunity for writing with enough passion to warrant an emoji or a meme.

Finalsite's voice is **helpful**, **friendly**, and **professional**. If a joke supports those goals and doesn't distract from your core message, it's OK. You might get the sense that this is a difficult bar to clear. That's not a coincidence.

<div align="center">

❗❗❗ Always remember [the failure mode of clever](#). ❗❗❗

</div>

If a joke doesn't land, there's a good chance you'll come off looking like a jerk. It's very hard to know if a joke will land if you don't know the person you're joking with.

A word about sarcasm. Sarcasm is extraordinarily difficult to communicate via text, because it is almost always communicated nonverbally in a face-to-face context. Trying to shoehorn nonverbal context into written content is extremely difficult, even when you know the person you're talking to. Trying to pull it off when you don't know who might be reading is a tough sell. Don't try it, dummy. (...See?!)

Writing for everyone

International audiences

Finalsite has clients all over the world, and not everyone you'll interact with speaks English as their first language. Writing with clear, simple language helps everyone, though, not just people with reading comprehension challenges. Follow these tips from the *Yahoo! Style Guide* to help keep your text friendly for international audiences:

- Keep the sentence structure simple (subject-verb-object).

- Include "signposts": words that help readers see how the parts of a sentence relate.

- Eliminate ambiguity.

- Avoid uncommon words and nonliteral usage (such as slang or irony).

- Rewrite text that doesn't translate literally.

Internal vs. external audiences

A good rule of thumb is: Never write down anything you wouldn't want a client to read. Internal communications may be more informal, use more jargon, and have a different voice from client-facing communications, but it should never be disparaging or cynical.

Writing about people

As a general guideline, always remember that **the person comes first**. Descriptions of any aspect of the person are modifiers - they are always adjectives, never nouns.

Age. Don't reference a person's age unless it's relevant to what you're writing. If it *is* relevant, include the person's specific age, offset by commas. Don't refer to people using age-related descriptors like "young," "old," or "elderly."

Gender. Avoid gendered pronouns like "guys" or "ladies." "Folks" works equally well for either in most situations, although it sounds a bit dated. And it's okay to use "they" as a singular pronoun in order to avoid the awkward "his or her" construction, but be mindful to talk about people as people, not things. When you can, try using these tips from the *Yahoo! Style Guide* to avoid gendered pronouns altogether:

- Use the imperative.
- Make nouns and pronouns plural.
- Repeat the noun, especially if it helps clarify meaning.
- Eliminate the pronoun.
- Substitute "a" or "the" for the pronoun.
- Use the passive voice when the actor is unimportant.
- Rewrite the sentence.

Ability. Don't refer to a person's disability unless it's relevant to what you're writing. If you need to mention it, use language that emphasizes the person first: "She has a disability" rather than "She is disabled." When writing about a person with disabilities, don't use the words "suffer," "victim," or "handicapped." "Handicapped parking" is OK.

Content creation

Structured content

Whether you're writing ticket responses or formal product documentation, it's important to have a clear document structure in mind. Organize content into discrete "chunks" to:

- Make parsing documents easier
- Make updating documents easier in the future

Following a set plan for document format helps you stay focused as you're writing, and it helps your audience as they're reading.

Document structure

Establish the proper context for what you're documenting at the beginning:

- "This video will cover X, Y, and Z."

- "When using Posts, it's important to structure your Folders and Boards correctly to ensure that content displays in the right place on the website. This document will explain how to set up Folders and Boards, and how to manage them after they've been created."

- "Have you ever wondered why you can't embed a video in your eNotice? This blog will answer that question."

If your document is long enough, use headers to make the text more scannable. Don't skip header levels. Mark up the article title as h1, headings as h2, and subheads as h3 or h4, as needed. Use sentence case (only the first word capitalized) for article titles and headings, title case for longer documents (like this Style Guide).

Document types

Tickets

Tickets should address a client's question or need and provide context and additional information if necessary to prevent the issue from recurring. Ticket responses should leave clients knowing what went wrong, why it went wrong, and how to keep it from happening again.

Establishing context is an important way of setting the client's expectations for the interaction. It puts you and the client on the same footing regarding what you can do for them immediately, what's ultimately possible, and what's not practical. Proper context can mean the difference between a one-response ticket and a back-and-forth slugfest.

Keeping a ticket conversational is a good way to establish rapport with our clients, and you should feel free to use your own voice and writing style. Always keep it professional, though. Proper spelling and good grammar convey authority, whereas persistent typos can undermine your credibility.

!!! **Remember to proofread your ticket responses before sending them.** !!!

Knowledge Base articles

KB articles should be informative first. They are written to allow users to understand a specific aspect of the software (feature, module, etc.).

If KB articles are structured consistently, they can easily be integrated into ticket responses (e.g., "Follow the steps in this KB article to resolve this problem [link to KB article]"). No further context is necessary in the ticket, because the KB article is self-contained and its common structure ensures that the article includes the relevant context and details.

The title of a KB article should be descriptive and begin with a verb, for example, "Print a calendar page."

The title and the first sentence of KB articles are the most important, because the Answer Bot and search function look for keywords in these places. The first paragraph should provide an overview of the article content, so users immediately know whether they're in the right place.

Labels. To help the Answer Bot, and our users, find them more easily, KB articles should make use of the "labels" (tags) functionality in Zendesk. Include up to 10 labels of search terms you think someone might use that may or may not be included in the title or first sentence of the article. These may include synonyms or alternate spellings for concepts covered by the article.

Images. A well-placed screenshot can convey a lot of useful information in a KB article, but don't assume that all your readers will look at it. Include a description of what the image shows in the article text, as well as meaningful alt text for screen readers. Images should be no more than 696px wide and aligned center.

Blog posts

Blog posts strike a casual tone to educate our users and generate enthusiasm about our products. Do not use a blog post for information that clients need to have. There's no way to ensure a client has read a blog post.

Videos

Videos should have a specific goal in mind - to introduce clients to a new feature or module, or to address a specific use case.

Screencast videos generally are meant to address a specific issue, and they should focus on that.

- Make a video when you need to illustrate something that the user will see on their own screen, especially if you can contrast what they see with what they should see.

- Don't use a screencast video to convey information other than whatever it is you need to illustrate on screen. The video should only be as long as it needs to be to demonstrate the issue at hand. Any information that's relevant to the ticket should be written down in the ticket itself.

Training videos and Support videos often walk users through a new feature. They should be scripted and polished before being recorded.

See Meldium for the credentials to the Screencast-O-Matic account used to create videos.

Use the "Script" feature to record audio in advance, then record the video to match the narration. This lets you focus on one aspect of the video at a time, and also allows you to include your script as closed captions when publishing. Captions also align with accessibility standards. Make sure to export your script and upload it to Resources when creating a video for finalsite.com domains.

Other communications

Finalsite Support also communicates with clients in forms that are less direct and personal. Sometimes these messages have useful information for clients or contain the answers to questions that come in later as tickets, so it's handy to be aware of when messages like this go out and what they say.

Admin Alert notices. These messages appear when a site administrator logs in. They often convey critical or timely information, and link off to a KB article or similar for additional information.

Pendo notices. Pendo is a system that tracks user activity and allows for in-app messaging for general communications, training purposes, release notes (eventually), or NPS/poll type surveys. These are kept very short, as they frequently occur during the workflow of our clients.

- **Banners (Top):** These banners are used for maintenance or service interruption announcements only. They should be short (no more than two sentences) and should not take up more than one line across the top. If more information is needed, link to a Knowledge Base article.

- **Banners (Bottom):** These banners should be used for polls such as NPS or surveys that are required at specific times of year. These should be used infrequently.

- **Badges:** Badges should be used as tool tips or as identification of a "New" feature in the software. They should appear automatically the first time and then be made available at all times by the user clicking on the badge.

- **Guides:** Guides are walkthroughs of the software that allow you to walk a client through a process. Guides should be five to six steps long and should not be longer than 10 steps. These should be created for simple processes and major UI changes.

Writing and document conventions

Inconsistency in written communications can confuse readers and make them feel less confident about what they're reading. This section spells out Finalsite's standard usage of common terms, especially ones that can be written out in more than one format.

Finalsite

Finalsite is one word. The first letter is a uppercase "F," and the rest of the word is lowercase. Our previous branding incorporated a lowercase "finalsite" logotype, so you may see that crop up from time to time. It should be corrected whenever found.

URLs and locations within the software

Directions to locations within the software should be italics, with nested locations specified by right pointed brackets (e.g., "*eNotify > Templates tab > Dynamic Content*").

Products and features

Product names. Finalsite sells two separate software products.

- "Composer" is our CMS platform.

- "Learn" is our LMS.

When discussing our products, they should be written as "Finalsite [product]" the first time, and then just "[product name]" for each subsequent use. Occasionally, using "Learn" on its own to describe the LMS can be awkward, so adding the "Finalsite" back in before it may help clarify matters

Module names. These are usually two words, both (all) capitalized, and never abbreviated.

- Athletics Manager
- Calendar Manager
- Campaigns
- Commerce
- Constituent Manager
- eNotify
- Feeds
- File Manager
- Forms Manager
- Group Manager
- Integrated Services Manager
- LMS Manager
- Multimedia Manager
- News Manager
- Payment Manager
- Posts*
- Push Message Manager
- Registration Manager

- Resources*
- Event Registration

- Services Manager

❗❗❗Watch out for eNotify - capitalize the "N," not the "e." ❗❗❗

*Note: If referring to Resources and Posts within the software, you can also use Resources module or Posts module.

Locations

Finalsite Headquarters
655 Winding Brook Dr
Glastonbury, CT 06033

Finalsite London Office
16-20 The Causeway
Teddington, MIddlesex
TW11 0HE, UK

We also have employees stationed throughout the world, including Berlin, Luxembourg, London, and Dubai.

Abbreviations and acronyms

- If the abbreviation or acronym is well known, like API or HTML, use it. Otherwise, define or explain abbreviations and acronyms on first use.

- We don't abbreviate modules.

- Capitalizing acronyms is tricky. "Laser" and "radar" are both acronyms, but are not capitalized unless they begin a word. "NASA" is also an acronym, and it is entirely capitalized.

Active vs. passive voice

"Passive voice" describes a style of writing that amplifies a disconnect or sense of distance between the written work and the reader or writer. Generally, work written in the passive voice is wordier and less direct than if it were written in the active voice.

Passive voice can also be used to obfuscate meaning or obscure connections (e.g., "His gun discharged" vs. "He shot his gun").

❗❗❗If you're not sure whether you're using passive voice, try inserting "by zombies" after the verb. ❗❗❗

Contractions

Contractions reflect how most people speak, so they are fine to use when communicating directly with individuals or groups.

Capitalization

- Title case capitalizes the first letter of every word except articles, prepositions, and conjunctions. Sentence case capitalizes the first letter of the first word.

- When writing out an email address or website URL, use all lowercase.

- Don't capitalize random words in the middle of sentences.

Dates and times

- Generally, spell out the day of the week and the month. Abbreviate only if space is an issue.
- Use a comma to separate the day and the date (Thursday, March 9), as well as the date and the year (March 9, 2017). Don't use a comma between the month and the year (March 2017).
- Use numerals and am or pm, with a space in between, e.g., 9:45 am. Don't use minutes for on-the-hour time.
- Use a hyphen between times to indicate a time period.
- Specify time zones when writing about an event or something else people would need to schedule.

Links

- Direct links to a new browser tab ("_blank" target).
- Include direct links when embedding media. If you're writing a News/Posts post that triggers an email notification, an embed that doesn't also include a direct link will be invisible to email readers.

Lists

- Use an ordered list for steps that must occur in a specific order, and bullets otherwise.
- If any item in a list (ordered or not) forms a complete sentence, all items must begin with a capital letter and end with a terminal punctuation mark.
- If no items in an unordered list form a complete sentence, skip the capitalization and end punctuation.
- If the items in the list complete an unfinished introductory sentence with a colon, put end punctuation after the last bullet only.

Numbers

Integers

- Separate groups of three digits with commas, counting from the right.
- Spell out numbers less than 10 ("one," "two," "three," etc. including ordinals - "third," "fourth," "fifth").
- Use numerals for numbers from 10 until one less than infinity.
- Consistency is more important than rules-lawyering. For example, if a sentence has multiple numbers in it and at least one is greater than 10, use numerals for all the numbers, including the single-digit ones.

Decimals and fractions

- Spell out fractions.
- Use decimal points when a number can't be easily written out as a fraction.

PERCENTAGES

Use the % symbol instead of spelling out "percent."

NUMBER RANGES

Use a hyphen (-) to indicate a range or span of numbers.

CURRENCY

- When writing about US currency, use the dollar sign before the amount. Include a decimal and number of cents if more than 0.

- When writing about other currencies, follow the same symbol-amount format.

PHONE NUMBERS

- Use dashes without spaces between numbers, e.g., 860-289-3507.

- Use a country code if your reader is in another country.

Notes and footnotes

If you need to use them, stop, back up, and re-evaluate how you're presenting the material. You're getting too deep in the weeds - pull up! Pull up!

Pronouns

- As stated in the "Writing about people" section, it's okay to use "they," "them," or "their" as a singular pronoun if the subject's gender is unknown or irrelevant.

- Use "he/him/his" or "she/her/hers" when appropriate.

- Don't use "one" as a pronoun referring to a person.

Punctuation

APOSTROPHES

- The apostrophe's most common use is making a word possessive. If the word already ends in an s and it's singular, you also add an 's. If the word ends in an s and is plural, just add an apostrophe.

- Apostrophes can also be used to denote that you've dropped some letters from a word, usually for humor or emphasis. This is fine, but do it sparingly.

- "It's" is valid **only** when it replaces "it is." When used as a possessive pronoun, "its" does not take an apostrophe.

COMMAS

- "Who gives a f*** about an Oxford comma?" [The courts, for one!](#) Use one whenever doing so adds more clarity than leaving it out.

- Commas can drastically alter the meaning of a sentence when left out or used carelessly. "Let's eat, Grandma!" vs. "Let's eat Grandma!"

PERIODS

- Periods go inside quotation marks.

- Periods go inside of parentheses only when the parenthetical statement is a complete thought/sentence; otherwise they go outside the parentheses.

- Leave a single space between sentences.

EXCLAMATION POINTS

- Exclamation points are used to show emphasis or enthusiasm. They are great at their job and they work just fine by themselves. Do not assign multiple exclamation points to a single task.

- Do not use exclamation points when describing failure messages, errors, alerts, or other disruptions.

QUOTATION MARKS

- Use quotes not only for direct quotations, but also for any specific language or text that you refer to in communications like ticket replies (e.g., "Look for the button labeled 'Save and Clone,' not the 'Save' button…").

- Use single quotation marks inside of a sentence or phrase already in quotes (see above). Otherwise, do not use them in place of double quotation marks.

SEMICOLONS

Semicolons have a specific use case: joining multiple independent clauses that do not have a coordinating conjunction, or joining independent clauses that have an non-parenthetical transitional expression (for additional details, refer to the definitive guide published by [The Oatmeal](#)).

Clearly, this is not helpful for most writers. If you are not thinking about things like dependent clauses and coordinating conjunctions as you're writing, it's probably best not to complicate things with semicolons. Make the sentence simpler and use a comma instead, or split it into two sentences.

Screenshots

Members of the Support team are extremely devoted to either [Droplr](#) or [Jing](#) as their screenshot tool of choice. Pick a side - we're at war. (They're both very good and offer a similar complement of features.)

Screenshots in a ticket are ephemeral, and you can draw on them however you'd like. In KB articles and other places where a screenshot will have a more permanent home, we recommend using one of Finalsite's brand colors to highlight the important parts of the image. Both Droplr and Jing will let you use custom colors.

- Dark gray: #363636

- Light gray: #767880

- Dark blue: #163052

- Light blue: #149bc7

- Purple: #531a51

- Raspberry: #C83ea8

Slang and jargon

Write in plain English. If you need to use a technical term, briefly define it so everyone can understand.

That vs. which

- "That" should be used to introduce part of a sentence that can't be removed without affecting the meaning - a restrictive clause.

- "Which" should be used with nonrestrictive clauses, which can be removed and the sentence will still be grammatical.

- **Tip:** If you need to put a comma before it, use "which." If not, use "that."

Glossary and word list

Action Menu

Athletics Manager

back end (n.), **back-end** (adj.)

backup (n., adj.), **back up** (v.)

beta

breadcrumb. A navigational term for the path you've taken to get to a certain web page, as well as an expanding series of links back to previous pages in that path.

Calendar Manager

Cascading Style Sheets, **CSS** after first use. Use **style sheets** to refer to documents.

checkbox

click. Avoid, as not everyone will be using a mouse to navigate - you can use "select" instead to cover both desktop and mobile interactions.

clickthrough (n., adj.), **click through** (v.)

Client Success Manager

CMS. Content Management System. **Composer** is our CMS product.

"Compose" mode. When a Composer page is active and ready to be edited.

Constituent Manager

CSV, **comma-separated values** on first use.

customizable

datasheet. Not "data sheet"

daylight savings time

denial-of-service (adj.), **DoS**. A type of hacking attack on website, designed to make it inaccessible to most

web users. Also **DDoS**, "Distributed Denial of Service" attack.

drop-down (n., adj.), **drop down** (v.)

email

eNotify

FED. Front-end developer (internal use only).

feed reader. Also known as **newsreader.**

File Manager

Forms Manager

front end (n.), **front-end** (adj.)

Gradebook

Group Manager

homepage

how-to (n., adj.)

hyperlink, a dated term. Use **link** instead.

info. In general, use **information** unless space is limited.

internet

internet service provider, **ISP** after first use. Plural: ISPs.

IP, internet protocol. (Occasionally "intellectual property"; it's not likely that you'll encounter that usage, but possible.)

JavaScript

KB, **Knowledge Base**

keyword

left-hand side, **right-hand side**. Use **left side** and **right side** instead.

lookup (n., adj.), **look up** (v.)

LMS, Learning Management System. **Finalsite Learn** is our LMS product.

login (n.), **log in**, **log in to** (v.)

mashup (n., adj.), a type of social media site page with a school's various platforms shown in one place.

Multimedia Manager. Only capitalize the first letters.

meganav, a type of navigation with a large flyout menu on hover.

News Manager

NPS, Net Promoter Survey

offscreen, **onscreen**

Page Pop

page view

password-protect (v.)

PM, Project Manager (Deployment), Product Manager (Development), Page Manager.

popup (n., adj.), **pop up** (v.)

portal

Registration Manager

resubscribe

right-click (n., v.)

screen capture, **screenshot**

screencast

setup (n.), **set up** (v.)

SEO, **search engine optimization**, a kind of sorcery experts perform to exert influence over Google.

SFED, Support Front-End Developer (internal use only).

Sign-in (n., adj.), **sign in**, **sign in to** (v.)

sitemap

slideshow

spam. Lower-case when referring to unsolicited email or the act of sending such email.

spell-checker (n.), **spell-check** (v.)

Support Portal. Where users go to find help articles, submit tickets, and so forth.

sync, **synched**, **synching** (v.)

toolbar

tooltip

touchscreen

troubleshoot

UI, user interface

upper-left corner, upper-right corner

up-to-date, always hyphenated

URL

username, not user name

voicemail

VPN, **virtual private network**

webinar

webpage

website

WiFi

Wiki

worldwide

WYSIWYG. "What you see is what you get," abbreviation always OK.

Support resources

External

Knowledge Base

https://www.finalsitesupport.com/hc/en-us

Finalsite Training

https://finalsitetraining.com

Support Blog

http://finalsite.com/blog/support-blog

Software Update Blog

http://www.finalsite.com/blog/release-notes

Internal

Wiki

http://173.230.129.120/wiki/Main_Page

Acknowledgements

This guide was inspired by - and sometimes copied (with permission!) from - the following works:

- MailChimp Content Style Guide

- The Yahoo! Style Guide

- [18F Content Guide](#)

- [The Economist Style Guide](#)