

# Style Guide (Updated)

## About This Guide

This style guide provides editorial guidelines for writing clear and consistent Annex Cloud-related developer documentation.

This guide has the following sections:

- **Styles A-Z** – Alphabetical reference of basic guidelines for grammar and usage for documentation and user interface text.
- **Glossary** – Definitions and usage of Annex Cloud terms and other key user interface terms.



- **Other Style Questions?** For other general style issues, we follow the conventions in *The Chicago Manual of Style* and the *Microsoft Manual of Style for Technical Publications*.
- **Spelling Questions?** For spelling questions, refer to [dictionary.reference.com](https://www.reference.com), which is based on the Random House Unabridged Dictionary.

## Benefits

Standard terminology and usage guidelines provide a foundation for a consistent style, more professional user interface and educational materials, and an easy-to-learn user interface.

- **Consistent** - Usage guidelines allow content providers to produce materials that follow a uniform style.
- **Professional** - Consistent style and usage guidelines help produce more professional-looking documents and user interface text.
- **Easy-to-Learn** - Users can learn the system faster and more efficiently if all customer-facing user interface text and documents use the same terminology.

## Audience

This guide is for users who build applications, write user manuals, create training materials, and any instructional or reference materials, including:

- Technical Writers
- Curriculum Developers
- Trainers
- Editors and Proofreaders
- Product Managers
- Developers
- User Experience Professionals

## Using the Style Guide

The goal of this style guide is to be a “living document,” which means as more writing styles need requirements around them, the document is easily updated to include the new additions and codify the changes as official part of the style guide.

The rules are listed in alphabetical order, which should make them easy to find. You can quickly look at the headings in the Table of Contents above and click the section you'd like to visit, or you can use the search bar at the top right of the page to input a term or word and find the related reference section.

Everyone has their own writing process and habits. Instead of creating a detailed step-by-step process, we've created a style guide to serve as a helpful tool to accentuate and aid each person's own writing method. Refer to the style guide as necessary during any phase of the

writing process. Whether you're creating a new document, making updates, or double-checking something during the peer review process, the style guide is there to support and confirm the writing styles and preferences we use in our documentation at Annex Cloud.

## Styles A-Z

### A

#### A, An

- Use *a* before words that start with a consonant or a “yew” sound:
  - A university
  - A hacker
- Use *an* before words that start with a vowel or an unsounded consonant:
  - An hour
  - An electrical engineer
- If an acronym is generally read as alphabetic letters, choose the article according to the first letter:
  - An API
  - A URL
- Add *a*, *an*, *the*, and other articles for ease of reading, both in text and lists that consist of complete phrases.

### Abbreviations

In general, abbreviated terms are repeated often or appear in tables or other tight spaces.

Don't confuse your reader with too many abbreviations or too much jargon. When in doubt, spell out the term.

#### When to spell out

The first time you use an acronym or abbreviation that isn't obvious, spell out the word or phrase and follow it with the shortened form in parentheses. For example: A local area network (LAN). Use the acronym or abbreviation in all subsequent references. However, in long manuals or manuals that include sections that are read separately, repeat the full name and abbreviation the first time a term is used in each new topic.

#### No apostrophes for plurals

For example, the plural of FAQ is FAQs, not FAQ's.

#### No periods

Don't use periods with most acronyms or abbreviations for technical terms, standard nontechnical abbreviations, or abbreviations for units of measure:

- ANSI (acronym)
- MB (technical abbreviation)
- PhD (nontechnical abbreviation)
- ft (unit of measure)

#### Capitalization

- When spelling out an acronym, only capitalize the individual words if they're proper nouns. Use all capital letters for the acronym itself.

- Use all lowercase for file extensions.
- Don't alter the capitalization of abbreviations in titles.
- Use uppercase to document time.
- If an acronym is read as alphabetic letters, choose the article according to the first letter. For example: an API, a URL.

## Common acronyms and abbreviations

Certain acronyms and abbreviations are so common that you never have to spell them out. For example: IBM, RAM, PC, US.

## Measurements and units

- Don't use abbreviations like *K* for thousand or *M* or *MM* for million.
- If the abbreviations are common to the audience, it's acceptable to abbreviate measurements, as in KB and GHz.
- Omit a space between a number and a single-letter abbreviation or unit symbol: 90%, 401(k). Do not use 100 % or 401 (k).
- For time values in a twelve-hour system, use AM/PM preceded by a space. For example, 10:30 PM. Do not use a.m., p.m., A.M., P.M., am, or pm.

## Ampersand (&)

Use an ampersand (&) only when screen real estate is an issue or when it's part of a company name, logo, proper noun, or title. Otherwise, spell out *and*.

## Apostrophes

In code samples, use straight apostrophes ('). Elsewhere, use curved apostrophes—the same character as a single closing quotation mark. In release versions and other words or numbers that start with an apostrophe, use an apostrophe, not a single opening quotation mark.

## In Plurals

- Don't use apostrophes to form plurals of proper nouns, acronyms, and numerals. For example, the plural of FAQ is FAQs, not FAQ's.
- Don't pluralize single letters, symbols, or mathematical signs by adding an apostrophe and an s.
  - **Incorrect:** Annex Cloud replaces unrecognizable characters with @'s.
  - **Correct:** Annex Cloud replaces unrecognizable characters with the at (@) sign.
- To form the plural of a numeral, add s but no apostrophe. For example: Type three 2s.
- In abbreviations for measurements, don't add an s to indicate plurality. For example: 10 oz or 30 mm.

## In Possessives

- To form the possessive case of singular nouns, including proper nouns ending in an s or z sound, use an apostrophe followed by an s.
- To form the possessive of plural nouns, add an apostrophe only.
- Don't use an apostrophe in these possessive pronouns: his, hers, its, ours, yours, theirs, and whose.

## Articles

Include definite and indefinite articles in your documentation. For ease of comprehension and translation, include *a*, *an*, and *the* in your writing.

*A* and *an* are indefinite articles and are used before a singular noun. They refer to any member of a group.

*The* is a definite article. It is used before singular and plural nouns and refers to one or more particular members of a group.

Whether to use *a* or *an* depends on the pronunciation of the word that follows it. Use *a* before any consonant sound; use *an* before any vowel sound, as in the following examples:

- An hour
- An HTML file
- A hand
- A hotel
- An umbrella
- A union

To complicate matters further, some abbreviations can be both acronyms and initialisms, requiring *a* in one instance and *an* in the other. For example, *FAQ*, which some pronounce "fak" and others spell out, requires *an* when spelled out and *a* when pronounced as a word. In some cases, it can be best to use the article that aligns with how the abbreviation is pronounced. The following list is a recommendation for which article to use:

- A SQL (database)
- An FAQ

## B

### Bulleted List

A set of items that's neither a sequence nor options. The following is an example of a bulleted list:

Here's a list of things that can go wrong, in no particular order:

- Your computer crashes.
- A meeting with a customer continues being rescheduled.
- You spilled a cup of coffee over your new keyboard.

### Buttons

#### Documentation

- Use bold text when referring to buttons: Click **Save**.
- Use the name of the button exactly as it appears on screen.
- Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down button, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*.

#### UI Text

- When naming buttons, name the action that the button will trigger, especially if it is potentially destructive. For example, in a warning message dialog box, **Delete All** and **Cancel** buttons are clearer than **OK** and **Cancel** buttons.
- Use title capitalization for button names, such as **Clone** or **Run Report**. Don't use ending punctuation in button labels.
- Don't use any special formatting when referring to buttons.

# C

## Capitalization

Don't capitalize words in generic usage: Unless a word is a proper noun, use lowercase. For example, "Refer to the style guide for capitalization standards." Don't use all caps for emphasis. If a sentence begins with a code element, consider rewriting so that the element is not the first word.

### Title Capitalization

Use title capitalization in titles and headings, including column headings in tables.

- Capitalize:
  - Nouns, pronouns, adjectives, verbs, adverbs, and subordinate conjunctions
  - The first and last words of titles, no matter what the words are.
  - The first word after the colon in titles that include subtitles.
  - The second element of a hyphenated compound in a title when it's a feature name, proper noun, or adjective: Real-Time Quotes, Third-Party Software
  - Key names, like Alt, Ctrl, Del
- Lowercase:
  - Articles (a, an, the), coordinating conjunctions, and prepositions.
  - The *to* in an infinitive. For example: I Want to Play Piano.
  - The second element of a hyphenated compound; for example, Real-Time Quotes, Third-Party Software.

### Screen Names

Use screen names as they appear on the screen. All systems reference, including input/output names, titles, messages, and so on must reflect the actual screen format as used in the product page/reference. For example, if phrase Standard Actions appears on the platform as *Standard Actions*, then it must be written that way in the documentation.

### Sentence Capitalization

Capitalize the first word of a phrase and any proper nouns in the phrase. Use sentence capitalization for each column entry in a table.

### Acronyms, Editions, File Extensions, and Links

- When spelling out an acronym, only capitalize the individual words if they're proper nouns. Use all capital letters for the acronym itself.
- Use a colon to separate two clauses when the second explains the first. Capitalize the word following the colon only when it's a complete sentence or formal quotation. For example: *Don't forget this point: The report is due by 9:00.*
- Always capitalize both words in an edition name, as in Enterprise Edition and Group Edition. Don't capitalize *edition* when it appears by itself as a common noun: Accounts are available in all editions.
- Use all lowercase for file extensions. For example, Word adds .docx to a file name if you neglect to specify the file format when saving. Refer to the [Microsoft Manual of Style for Technical Publications](#).
- Capitalize link text based on context. For example, if link text includes an element that is capitalized in the UI, capitalize it in the link text too.

### Referring to UI Text in Documentation

If you refer to a UI label in documentation, match the capitalization in the user interface.

- When referring to tabs, don't capitalize tab. For example, *Accounts tab*.

- Don't capitalize *report* unless it's part of the report name.

## Checkboxes

- *Checkbox* is one word.
- Use with the verbs *select* and *deselect*, as in *Select the checkbox to enable the option*.
- Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down button, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*.

## Contractions

Contractions can be used in documentation and UI text.

- Don't form a contraction from a noun and a verb, as in: Annex Cloud's going to announce a new product feature for their platform in the next release.
- Don't form a contraction from a noun and a verb, as in *it'll* or *would've*.

## D

### Display, View

Use *display* to describe what a Web browser or the app does. Use *view* to describe what a user does. For example:

- Choose which related lists will display on your detail pages.
- You can view related items in related lists.

### Drop-Down Buttons

A button that expands to show more than one option.

In general, use the format *Click X and Select Y*: Click **Reports** and select **Points Accrual Tier Report**.

Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down button, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*.

## E

### Email

Use *email*, not *e-mail*, *E-mail*, or *E-mails*. Use *emails* as the plural. Acceptable for use as a noun or verb.

### End Punctuation

Refer to user interface elements using the element's exact label (including any end punctuation, such as an ellipsis). For example: Click **Add...** to browse for files on your local computer.

### Etc.

Don't use in documentation or UI text. Rephrase to provide more specific information.

## Examples

When adding an inline example, introduce it with *for example*. Don't use *e.g.*, *i.e.*, or *example*.

- For example, if a customer reports a problem that you can't solve during the chat, create a new case for the customer.

## F

### File

Don't capitalize when used as part of a name, unless in a heading or considered part of the proper name.

### File Names and Extensions

Use the following style guidelines for file names and file extensions.

- For file, directory, and drive names, use the exact spelling and capitalization used in the program or file itself.
- Use all lowercase for file extensions. For example, Word adds .docx to a file name if you neglect to specify the file format when saving. Refer to the [Microsoft Manual of Style for Technical Publications](#).
- *File name* is always two words.

### First Person

Don't use *I*.

*We* is acceptable. For example, we recommend that the file size be under 50 KB.

### Folder Names

Don't use quotation marks or any special formatting for folder names. Use the folder name exactly as it appears in the user interface.

## H

### Hyphens

- Use hyphens to create compound words.
- Be consistent with which words you hyphenate.
- The following prefixes normally don't require a hyphen: ante, anti, bi, bio, co, counter, extra, infra, inter, intra, macro, mid, mini, multi, non, over, post (after), pre, pro, pseudo, re, semi, sub, super, supra, trans, ultra, un, under.
  - Exception: when a prefix stands alone, it carries a hyphen (over- and underused).
  - Other exceptions: the prefix carries a hyphen if the second element is a capitalized word or numeral (un-American, pre-1914) or the compound is a homonym (re-create means to create again, recreate means to take recreation).
- When the prefix ends with a vowel and the root begins with a vowel, such as pre-existing, hyphenate.
- When a measurement is used as an adjective, use a hyphen to connect the number to the measurement, as in *10-point type*. Otherwise, don't use a hyphen.
- Hyphenate a fraction written as words: *Three-fifths*, *Four and one-half*.
- Hyphenate a two-element number under 100: *Sixty-three*, *twenty-one*.
- Don't add a hyphen before *text* in Rich Text Area or Long Text Area.
- When alphabetizing terms, start with spaces and hyphens, followed by numbers, followed by letters. Always treat a hyphen as a space. For example:

- W2L
- Web Tab
- Web-to-Lead
- Web2Lead

## I

### Italics

- Use italics for emphasis, but don't overdo it.
- Avoid using italics in on-screen text, as italic text is hard to read.
- In documentation, use italics for specific references to the titles of manuals, books, magazines, disks, videotapes, films, audiotapes, catalogs, bulletins, and promotional literature.

## J

### Job Titles

Capitalize the first letter of each major word of a formal title only if it refers to a proper name. For example: Kevin Lawrence, VP of IT Development, attended the meeting.

In running text, use lowercase when you name a formal title without a person's name, when you set off the person's name with commas, or you're describing general duties or responsibilities.

For example: The project lead will be assigned next week.

## K

### Keyboard and Key Names

- Don't format key names in bold.
- Use title capitalization for key names, as in Alt or Right Arrow.
- Use the verb *Press* instead of *Click* or *Hit*, as in *Press Ctrl*.
- Use a plus sign, as in Ctrl+P, to indicate key combinations.
- Don't include a space before or after the plus sign.
- Use the term *shortcut* instead of *command* to refer to a keyboard shortcut.

## L

### Lists

Lists organize categories of information or highlight important elements. Run-in lists present a series of enumerated items in running text; displayed lists present bulleted or ordered items on separate lines for greater visual effect and readability. Bulleted lists are best used to highlight items that may appear in any order; ordered lists indicate priority ranking or sequencing.

- Introduce a displayed list with the beginning of a sentence followed by a colon. If the introduction is a complete sentence, end it with a period.
  - Accounts

- Opportunities
- Quotes

**Note:** If Confluence had a more robust bullet system, and there was an additional subset to the list, the next group of bullets would use a different bullet icon than the two bullets shown above.

- Keep items in a series, list, or table parallel. Don't mix fragments and full sentences.
- When introducing a list, don't refer to the number of items in that list. Doing so could cause errors if list items are added or deleted.
- Use an initial cap for the initial word of each line item, whether a fragment or a full sentence.
- Omit the period after items in a bulleted or other type of list only if the items are fragments rather than complete sentences. However, a period is necessary at the end of a sentence whenever more than one sentence exists for that bullet. In this case, make all bullets complete sentences that end in periods so that each bullet is parallel.
- Focus on users' tasks; write only what is necessary for users to complete them.
- Keep tasks short.

## N

### Numbers

- Spell out numbers:
  - At the beginning of a sentence: Twenty-five people were part of the development team.
  - If the number is fewer than 10: Of the seven systems, the administrator backed up six daily. This rule applies unless the number precedes a unit of measure.
  - When depicting *approximate* numerals in hundreds or thousands: The managed forest contained about six thousand trees.
- Use numerals:
  - For numbers 10 or greater.
  - For *approximate* numbers above 999,999, use the numeral followed by "million" or the appropriate word instead of all the zeros: The solar system is estimated to be about 4.5 billion years old.
  - For *specific* round numbers, such as 34,000 and 200,000, use the full numeral, including the zeros. Don't use "thousand": Custom views display only the most recent 200,000 rows from the filtered data set.
- For numbers with four or more digits, use commas between groups of three digits, for example, 1,000 emails per user.
- To form the plural of a numeral, add s but no apostrophe: Type three 2s.
- Don't use abbreviations like *K* for thousand; or *M* or *MM* for million.

## P

### Parallel Construction

- Use the same grammatical form for words or phrases in lists, titles, headings, or any other group of items that are related in grammatical structure or function.
- For titles, headlines, and headings, be consistent with equivalent headings throughout; that is, use nouns, noun and gerund phrases, or questions.
- Keep items in a series, list, or table parallel. Don't mix fragments and full sentences.
- Keep elements within a sentence parallel.

## Popup Windows

Use popup window to describe a new, separate browser window that opens during an action on a page. Use appropriate title case capitalization for popup window names. *Popup* is always one word; never hyphenate. For example: Click a custom button to display a record in a popup window.

## S

### Screen Names

- Use screen names as it appears on the screen.
- All system references: input/output names, titles, messages and so on must reflect the actual screen format as used in the product page/reference.

Incorrect	Correct
Standard actions	Standard Actions
Segment name	Segment Name

### Screenshot, Screen Shot

Use *screenshot* and not *screen shot*.

## Slashes

- Avoid using slashes (/). In most instances, a slash means *or*, so use *or* instead.
- It's acceptable to use slashes in the names of system components, software packages, and so on when appropriate. Also, be especially aware that, in many cases, slashes may be parts of commands or instructions that are essential to perform the task.

## T

### Tables

- Avoid using captions for tables.
- Don't add an introductory phrase (also known as a *stem*) to a task or table that appears soon after a topic's title. For example, a set of steps that immediately follows the title *Editing a File* does not need the introductory phrase "To edit a file:". If you include only essential introductory content in a task, you'll never need a stem.
- Don't introduce tables using "The following table." Instead, say "The table" or "This table."
- Capitalize each column heading in a table, the first word of each column entry, and proper nouns.

## Time

For time values in a twelve-hour system, use AM/PM preceded by a space. For example, 10:30 PM. Don't use a.m., p.m., A.M., P.M., am, or pm.

## V

### Voice

Use active voice whenever possible. Be careful not to change the meaning of a sentence when rewording from passive to active voice.

Passive voice can be appropriate in some cases. For example:

- When active voice creates an awkward construction.
- The subject is unknown or not the focus of the sentence.
- You want to avoid blaming the user.
- To convey an impersonal tone for a technical audience.

Here are some strategies and examples for changing passive voice to active voice.

Strategy	Passive Voice	Active Voice
Identify the real subject and switch from passive to active voice.	The data is entered by the user.	The user enters the data.
	When you create an action, its layout is populated with a default set of fields.	When you create an action, the system populates its layout with a default set of fields.
	A song was performed by the musician.	The musician sings a song.

## W

### Which, That

Use *that* to identify a particular item and *which* to add more detail about something.

- Use *that* for restrictive or defining clauses: The system administrator accesses the screen that creates reports.
- Use *which* for nonrestrictive clauses: This screen, which is a new enhancement, reduces duplication of data entry.

### Who, That

Both *that* and *who* can be used to refer to a person, but *who* is considered more polite: The user who logs in first can access the new feature.

### Windows

Use title-style capitalization for window names.

Don't list the following UI element types unless needed for clarity or navigation: button, checkbox, drop-down button, field, icon, menu, link, radio button, or window. For example, write *Click **Save***, not *Click the **Save** button*.