Salesforce.org Documentation Guidelines for Community Contributors

Updated 10/1/2021

Thank you for contributing your time and knowledge to Salesforce.org documentation. Your contributions make it possible for us to provide comprehensive documentation that's tailored for our community. *By following these guidelines for consistent formatting and style, we can more quickly share your work with our users!*

Format Your Doc

Follow these guidelines to format your docs. To see these principles in action, check out the Example Docs.

Keep it Compassionate

- Like you, we care about the people we serve. That's why we think of our docs as a love letter. We want to be friendly, supportive, and use straightforward language. We're here to help people get their jobs done!

Tell Us What It Is

- Include an overview that defines the feature you're writing about and why it's valuable. Help the reader understand exactly why they should use the feature.
- Include the definition of the feature in the first or second sentence of the overview. Remember, many of the users coming to this doc don't know as much about our products as you do! For a great example, see the In-Kind Gifts Overview.

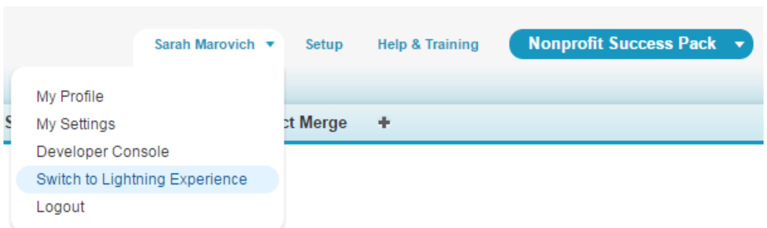
Follow a Workflow

- Docs, like the people reading them, should follow a workflow. A worfklow is just a fancy way of talking about the path someone follows to set up and use a feature: "Create a Grant," "Edit a Relationship," and so on.

- Use numbered lists for tasks so people can follow along easily.

Use Lightning Experience UI

- Lightning Experience is the official user interface of Salesforce.org, so be sure to use that when documenting tasks or taking screenshots.
- If you aren't already in Lightning, you can easily switch over. Just click your name, then click **Switch to Lightning Experience**.
- There are still some Salesforce features that only exist in Classic. Be sure to acknowledge that in the title (if it applies to the whole article) or in context (if it's just a step you need to switch for).



Create Sections

- Help your reader by breaking up your doc into logical, consumable chunks. Create separate sections for each large chunk. Separate administrative content from end user content.
- For example, imagine you're documenting a new feature called Widgets. An administrator must set up Widgets with customized page layouts and new fields. Additionally, users need to know how to create and merge Widgets. Your structure for Widgets docs might look something like this:

  Overview
  Set Up Widgets
    Customize Page Layouts for Widgets
    Create Custom Widget Fields
  Use Widgets
    Create a Widget
    Merge Widgets

Add a Table of Contents (TOC)

- Start every doc with a TOC to clearly lay out the sections your reader should expect to see.
- Start with the sentence "This article contains these sections:" and follow that with a linked, bulleted list of your sections. You can see an example of what your TOC should look like in the [Example Docs](). You can also copy the sample TOC in the [Template]().

Don't Forget Setup

- If a feature requires setup, add it as a section after the Overview.

- If a step starts in Salesforce Setup, tell users how to get to the area they need, like the Setup Home or Object Manager. Remember that we always document the Lightning UI, like this:

  From Setup, enter `Profiles` in the Quick Find box, and then select **Profiles**.
  From Setup, click the Object Manager tab.

Less Is More

- It's easy to over-explain a feature and include every tiny step required to use it, but making people read all the things isn't compassionate. Instead, help them finish a task quickly–include only the information they need to understand what the feature is, how to set it up, and how to use it.
- For Salesforce-ish stuff, it's ok to reference the Salesforce Help! See Referring to Salesforce Help for details.

Pictures Are Worth a Thousand Words

- Use screenshots to help people understand where they need to be and what they need to do.
- That said, use screenshots judiciously and not for every step of a task. See Screenshot Guidelines to learn more.

Follow Salesforce.Org Style

- **Titles:** Use imperatives, like we do in this guide. For example: Create Soft Credits or Set Up Donations. Also, capitalize the first letter of each word.

- **Lists**: Use numbered lists to make it easier for people to follow a procedure. Also use bulleted lists (like we're doing now!) to group items, such as a list of fields or options. Capitalize the first word of each bulleted item and use a period at the end if it's a full sentence.

- **Button names, links, and other UI elements**: Bold the names of buttons, links, or any UI element that someone clicks, selects, or otherwise acts on. Don't bold user-provided values or UI elements that you simply reference. And always match the capitalization that you see in the UI. For example: Click **New**, then enter the Contact name in the Name field.

- **User input**: If you give an example of user input, use Courier font. For example: From Setup, enter `Opportunities`.

- **Active voice**: Use active voice whenever possible. This is especially important when talking about what our products do. Instead of "The Next Grant Deadline Due Date field on the main Grant Opportunity record is automatically updated," try "Salesforce automatically updates the Next Grant Deadline Due Date field on the main Grant Opportunity record."

- **Product and object names**: Always capitalize product names such as Nonprofit Success Pack, NPSP, and Salesforce, and all Salesforce object names such as Account, Contact, Opportunity, and Engagement Plan.

- **Notes**: Use notes for information that really needs to stand out. Start notes with NOTE: or, if the note is extra important, IMPORTANT:.

- **Referring to the Salesforce Help:** If you find that most of what you're writing is standard Salesforce functionality and not specific to a Salesforce.org product or feature, refer people to the Salesforce Help to avoid reinventing the wheel. Just be sure to do this judiciously! Follow this format (replace the names and links to be relevant): For more information, see Supported Languages in the Salesforce Help.

Add Screenshots

Screenshots are a great way to convey a lot of information quickly. Use these guidelines to create screenshots that are sure to please your readers!

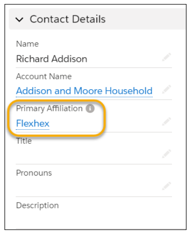
Prepare to Take Screenshots

- We suggest downloading a free trial of Snagit because it's easy to use and contains the styles we use. You can use any screen capture program, as long as the DPI of your images meets our minimum requirements.
- Download Snagit projects that contain our callout styles:
  - PC
  - Mac
- To ensure that the screenshots aren't blurry, use a DPI of 200. Then, resize images as follows:
  - Icons = 100-200 px wide
  - Small images (¼ - ⅓ UI) = 400px wide
  - Medium images (½ to ⅔ UI)= 600px wide
  - Large images (full UI) = 800px wide
- Using your browser resizer, set the browser width to a maximum of 1024 pixels wide.
- Only use fictional names, companies, and data in your screenshots but make them realistic. Don't use recognizable fictional names that may fall under copyright.
- **Don't use screenshots that show custom functionality like a custom app or custom fields. Use an org with an original trial configuration…or as close as possible.**

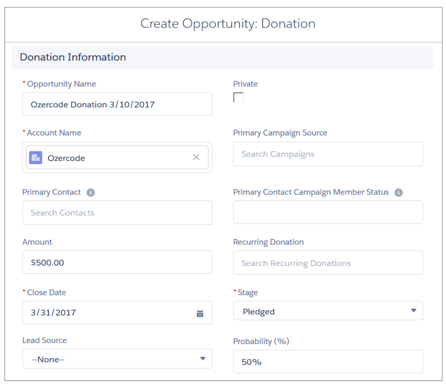
Take Screenshots

- Size matters! You don't want a screenshot that doesn't fit on the page or is so small that you can't tell what you're looking at. Again, use a 200 DPI with a max width of 800px (or 4 inches).
- Don't use full-screen screenshots. Capture only the relevant parts of the screen.
- Don't include the header or scroll bars unless they're absolutely essential to your screenshot. For example, if you're writing about the Primary Affiliations field on the

Contact record, focus on the immediate area around the field and then highlight it using an orange box with rounded corners (see [Edit Screenshots and Add Callouts]), like this:



- When capturing a region, be careful not to cut off text or buttons.
- When capturing an overlay screen, don't include the background. For example, when creating a new Donation from the Opportunities related list on an Account and the new Donation screen appears in front of the Account record, only capture the relevant areas of Donation screen itself, like this:

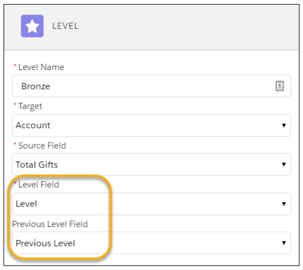


Save Screenshots

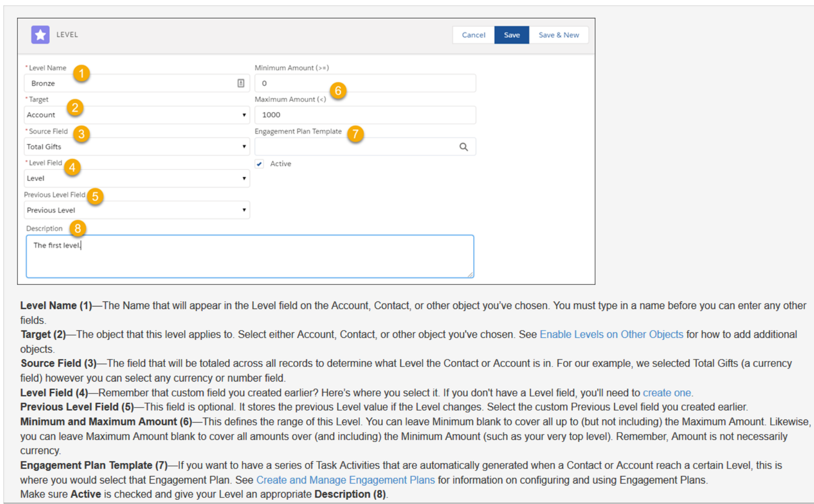
- Save your original full-size screenshots locally. We almost always need them as separate files when we create our final documentation.
- Save your image as a PNG file.
- Add a 1px black border to all screenshots.
- Use a filename in the format ArticleAbbreviation_ImageDescription.png. For example, if you have an image in the Create and Manage Campaign Lists article that shows the Page Layout Editor, your filename should be Campaign_Lists_PLE.png.
- Deselect **Use transparency** when saving.
- If you plan to add callouts to your screenshot, save a clean source copy. Then, save the version with the callouts with a new name. It's a great idea to always have a copy of the original screenshot without any editing.

Edit Screenshots and Add Callouts

- **Text**: Don't add text on the screenshot! We can't translate this text and it causes maintenance issues if we need to update the screenshot. Use callouts instead.
- **Call out one part of the screen:** To highlight a certain part of the screen, use a 4 px orange box with rounded corners and a lower-center drop shadow. For example:



- **Call out multiple parts of the screen:** Use numbered callouts to reference certain parts of the screenshot. Then follow the graphic with a paragraph or bulleted list that describes each of the callouts.
    - As you mention the UI element that a numbered callout points to, add the number in parentheses to your description. The callout number should be white, Sans font inside a solid orange circle, like this:

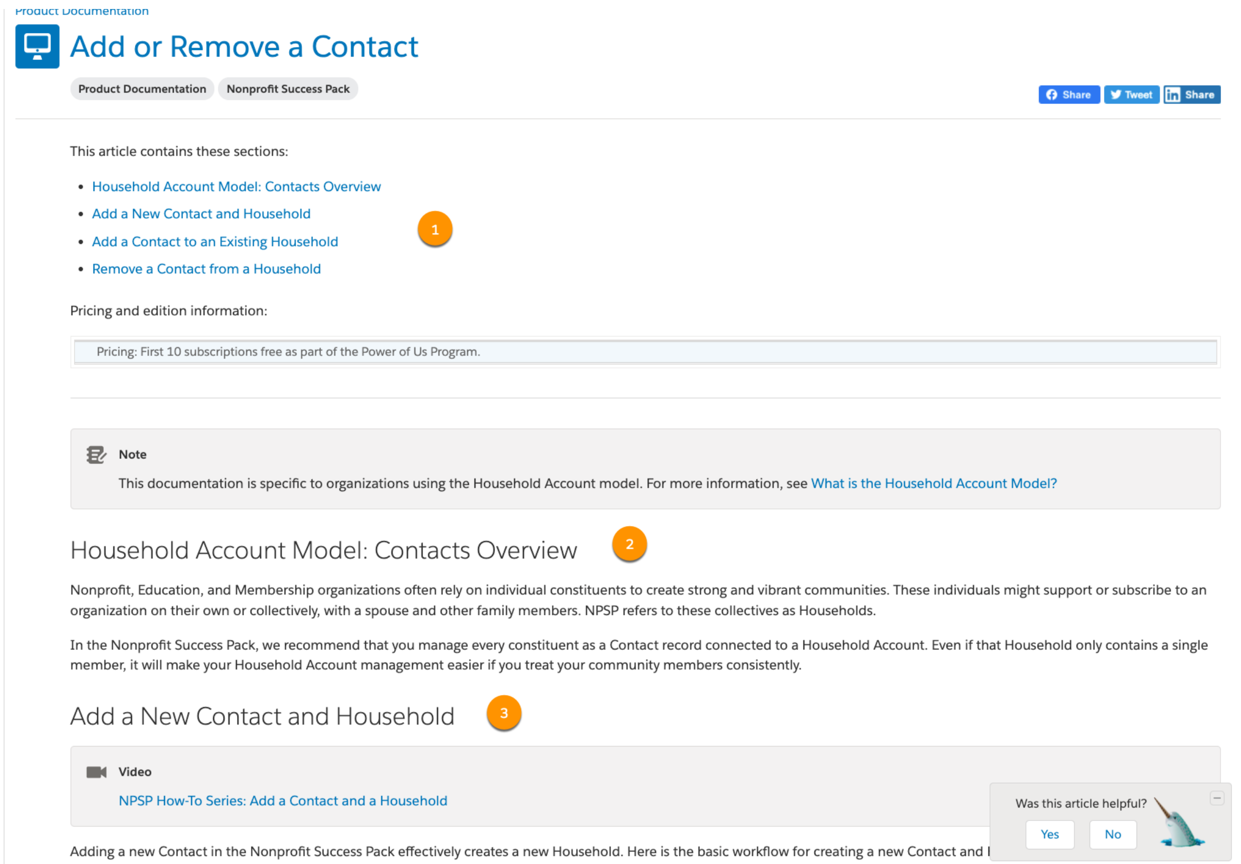


Example Docs

Here are some examples of our structure and style elements in action. Also check out some of our docs in the wild to get more ideas:

- Pause a Recurring Donation
- Take Client Notes
- Set Up Application Requirements and Action Plans

Article


Product Documentation

Add or Remove a Contact

Product Documentation Nonprofit Success Pack

Share Tweet Share

This article contains these sections:

- Household Account Model: Contacts Overview
- Add a New Contact and Household
- Add a Contact to an Existing Household
- Remove a Contact from a Household

1

Pricing and edition information:

Pricing: First 10 subscriptions free as part of the Power of Us Program.

Note

This documentation is specific to organizations using the Household Account model. For more information, see What is the Household Account Model?

Household Account Model: Contacts Overview

2

Nonprofit, Education, and Membership organizations often rely on individual constituents to create strong and vibrant communities. These individuals might support or subscribe to an organization on their own or collectively, with a spouse and other family members. NPSP refers to these collectives as Households.

In the Nonprofit Success Pack, we recommend that you manage every constituent as a Contact record connected to a Household Account. Even if that Household only contains a single member, it will make your Household Account management easier if you treat your community members consistently.

Add a New Contact and Household

3

Video

NPSP How-To Series: Add a Contact and a Household

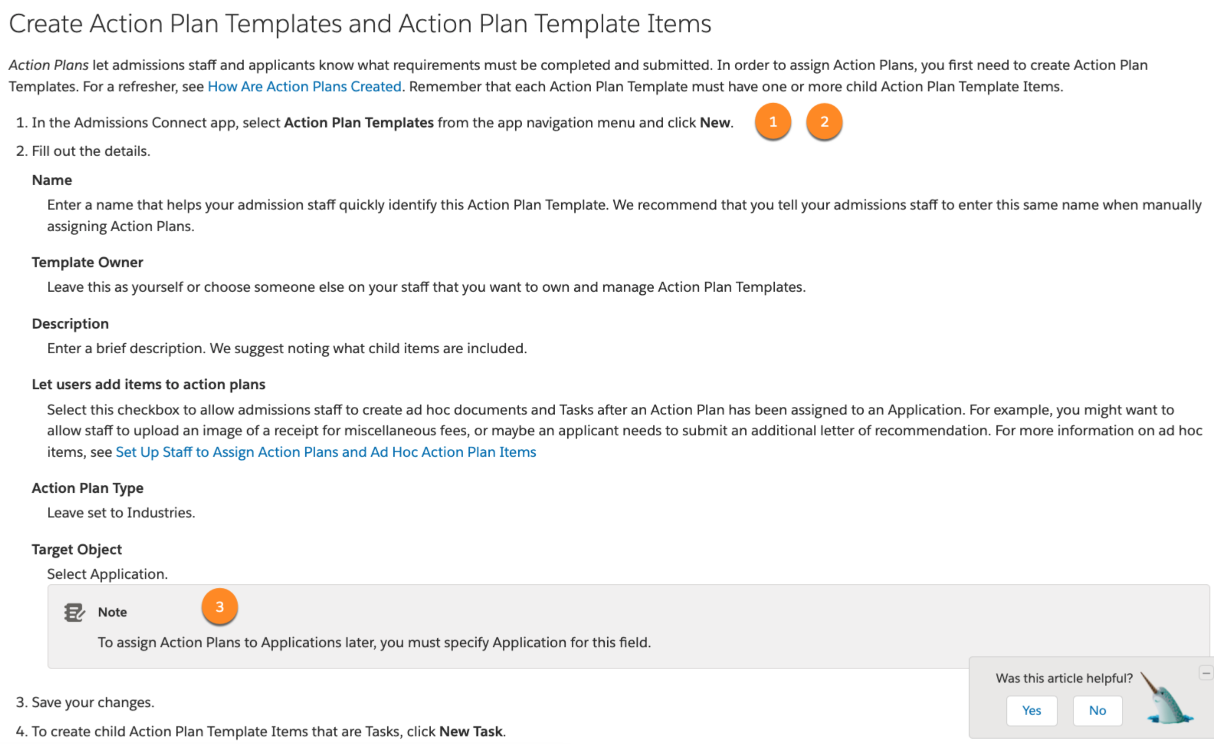
Was this article helpful?

Yes No

Adding a new Contact in the Nonprofit Success Pack effectively creates a new Household. Here is the basic workflow for creating a new Contact and I

1. Start every article with a table of contents.
2. If you're introducing a feature, your first paragraph should be an overview that explains why the feature is useful.
3. If setup information is required, it should come after the introduction.

Task



Create Action Plan Templates and Action Plan Template Items

Action Plans let admissions staff and applicants know what requirements must be completed and submitted. In order to assign Action Plans, you first need to create Action Plan Templates. For a refresher, see How Are Action Plans Created. Remember that each Action Plan Template must have one or more child Action Plan Template Items.

1. In the Admissions Connect app, select **Action Plan Templates** from the app navigation menu and click **New**.
2. Fill out the details.

   Name

   Enter a name that helps your admission staff quickly identify this Action Plan Template. We recommend that you tell your admissions staff to enter this same name when manually assigning Action Plans.

   Template Owner

   Leave this as yourself or choose someone else on your staff that you want to own and manage Action Plan Templates.

   Description

   Enter a brief description. We suggest noting what child items are included.

   Let users add items to action plans

   Select this checkbox to allow admissions staff to create ad hoc documents and Tasks after an Action Plan has been assigned to an Application. For example, you might want to allow staff to upload an image of a receipt for miscellaneous fees, or maybe an applicant needs to submit an additional letter of recommendation. For more information on ad hoc items, see Set Up Staff to Assign Action Plans and Ad Hoc Action Plan Items

   Action Plan Type

   Leave set to Industries.

   Target Object

   Select Application.

   > **Note**
   >
   > To assign Action Plans to Applications later, you must specify Application for this field.

3. Save your changes.
4. To create child Action Plan Template Items that are Tasks, click **New Task**.

1. Use numbered lists for tasks.
2. Bold names of UI elements being acted on, such as button names.
3. Use notes for information that needs to stand out.

Template

Here is a sample format you can follow. Copy this into your own Google Doc to get started!

Article Title

This article contains these sections:

- Section 1 Title
- Section 2 Title
- Section 3 Title

Section 1 Title

Section 1 text.

1. Click , then click Setup.
2. From Setup, enter `permission` in the Quick Find box, and then select **Permission Sets**.
3. Click **New**.
4. Enter a descriptive label.
5. Save your work.

Example if documenting the Object Manager.

1. From Setup, click the Object Manager tab.
2. Click <object name>.
3. Click **New**.
4. Enter the relevant information and save your work.

Section 2 Title

Section 2 text.

Section 3 Title

Section 3 text.