Customer QA Instructions

The customer QA (quality assurance) process is an important factor in guaranteeing the success of your content. It is a chance for you to check the asset created in Total Expert against the original design vision. It is also an opportunity for compliance to confirm that the asset fulfills any necessary requirements.

Overview

Once an asset you have requested is ready to test, a Total Expert Content Coordinator enters the current date in the Date Ready for Customer QA column of the Smartsheet. This triggers an email notification to you that the asset is ready. Then you can proceed through the step-by-step process below.

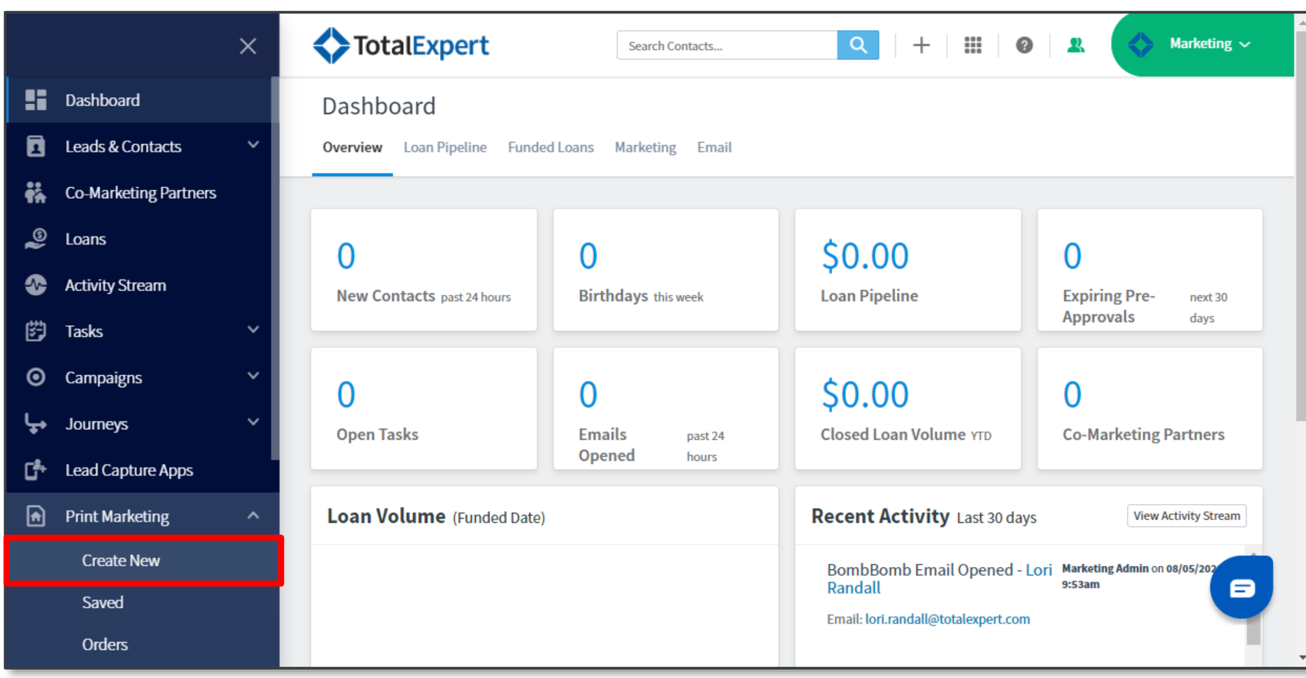
Note
The steps below represent a typical recommended process. However, because each organization has unique brand and compliance expectations, your process may vary.

If your review discovers any necessary changes, leave a comment on the Smartsheet with the changes needed.

When the asset is approved, check the **Customer Approved** box in the Smartsheet record. Any changes requested after this box is checked must be submitted as an adjustment. You have up to 2 weeks from the date entered in the Date Ready for Customer QA column to review the asset; at that time the asset will automatically be considered approved.

Step-by-Step QA Process

1. Log in to the TE account you will use to test the asset (Marketing Admin or a designated test user).
2. Navigate to **Print Marketing → Create New**.



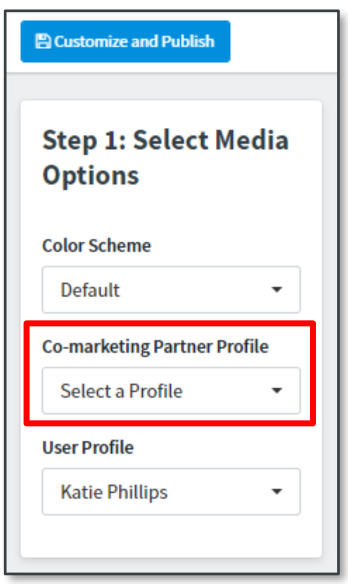
3. Identify the asset you want to test.

   Verify that:
   - ☐ The correct thumbnail is shown in the Total Expert list.
   - ☐ The **Co-Branded** tag is applied to the asset (if applicable).
   - ☐ The asset is shown in the correct folder (if applicable).

   Troubleshooting notes:
   - If the asset is not listed here, go to **Manage Marketing → Manage Templates** and:
     - select **Actions → Media Settings**. Ensure that the status is marked Active.
     - select **Actions → Team Settings**. Ensure that the asset is assigned to the Media Testing Group. Also select **Actions → User Settings** and ensure that user settings are not overriding the team setting.
     - (for co-branded assets) select **Actions → Media Markups**. Ensure that a cost split is assigned.

4. Click the name of the asset you want to test.

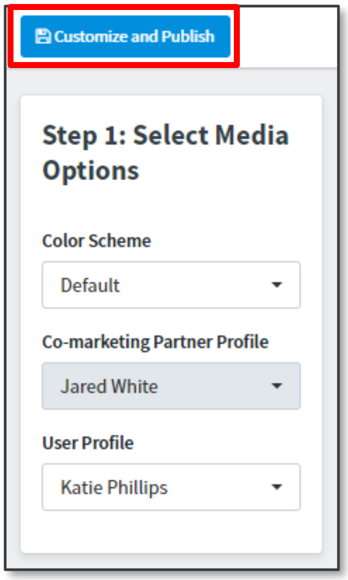
5. If the asset is co-branded, select an option in the **Co-marketing Partner Profile** drop-down list. (The User Profile drop-down list should automatically select the current user.)



   Verify that:
   - ☐ The correct partners are available to select.
   - ☐ The correct MLS listing information is brought in (if applicable).

- ☐ The correct pricing engine product information is brought in (if applicable).
- ☐ The correct information in other drop-down lists (such as state and color scheme) is brought in (if applicable).

6. Click the **Customize And Publish** button at the top of the page.



Verify in the body of the piece that:

- ☐ The correct images are added.
- ☐ The correct text and fonts are added.
- ☐ The correct colors and logos are used throughout.
- ☐ Editable and non-editable areas are defined correctly.
- ☐ Any dynamic information in the body text (company name, email address, physical address, date, and so on) populates correctly.
- ☐ All elements are aligned correctly.
- ☐ The resolution is correct; there is no blurriness.
- ☐ There are no spelling errors or typos.

Verify in the footer's contact information that:

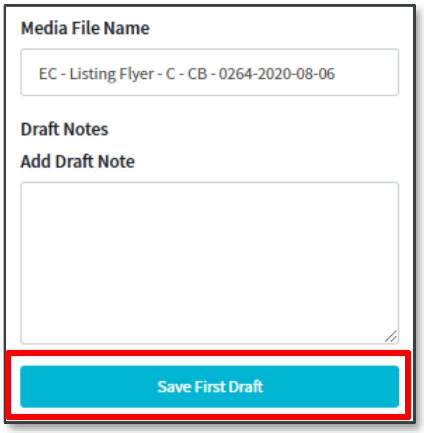
- ☐ Both users' information populates correctly (names, titles, phone numbers, email addresses, websites, NMLS numbers, license numbers, logos, headshots, and so on).
- ☐ Long names (such as addresses, titles, email addresses, and websites) are not being cut off.
- ☐ Address line 2 (such as suite or apartment number) populates correctly where appropriate.
- ☐ Prefixes such as office, cell, fax, email, or website are hidden if the information is not in the user's profile.
- ☐ Any information populated by branding or cost center logic is correct.

Verify in the footer's disclaimer that:

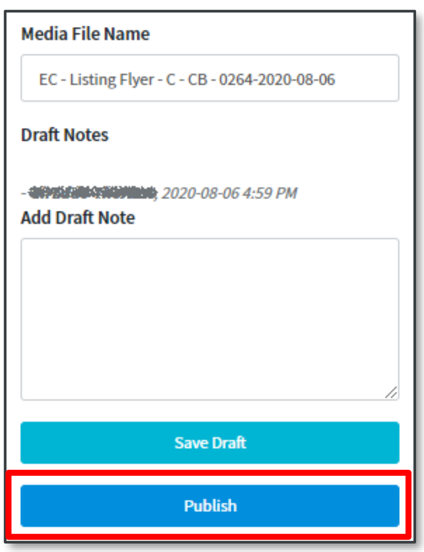
- ☐ The correct disclaimers populate.

- ☐ No text is cut off.
- ☐ The correct EHL/EHO logo is used.
- ☐ The font and size used are correct.
- ☐ Dates in the disclaimer update appropriately.

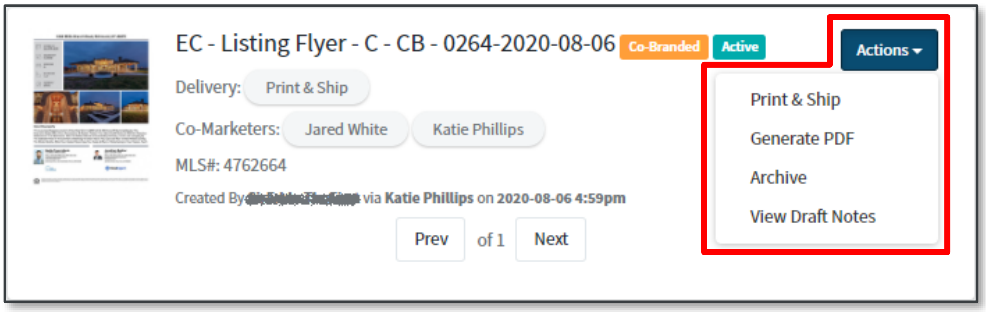
7. If everything looks correct, click the **Save First Draft** button. You can use the Add Draft Note field to document any changes made in the current draft.



8. Click the **Publish** button. The page refreshes to Print Marketing → Saved with the list filtered to show only the piece you just created.



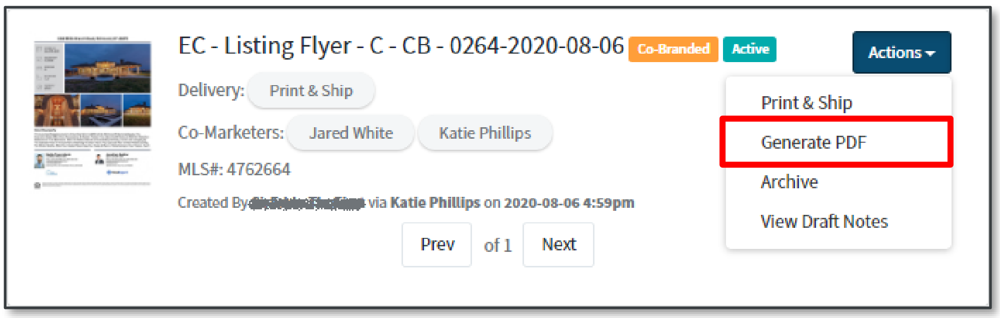
9. Click the **Actions** button to open the drop-down menu.



Verify that:

☐ The correct delivery methods for this piece are showing in the drop-down menu. Depending on the type of piece, options may include Generate PDF, Generate PNG, Print & Ship, USPS EDDM, or Share.

10. Select **Actions → Generate PDF**.



Verify in the generated PDF that:

☐ The format stays consistent, and all colors, fonts, spacing, and so on are correct.

☐ No text is cut off.

☐ Bleeds are added to the dimensions of the piece on all sides.

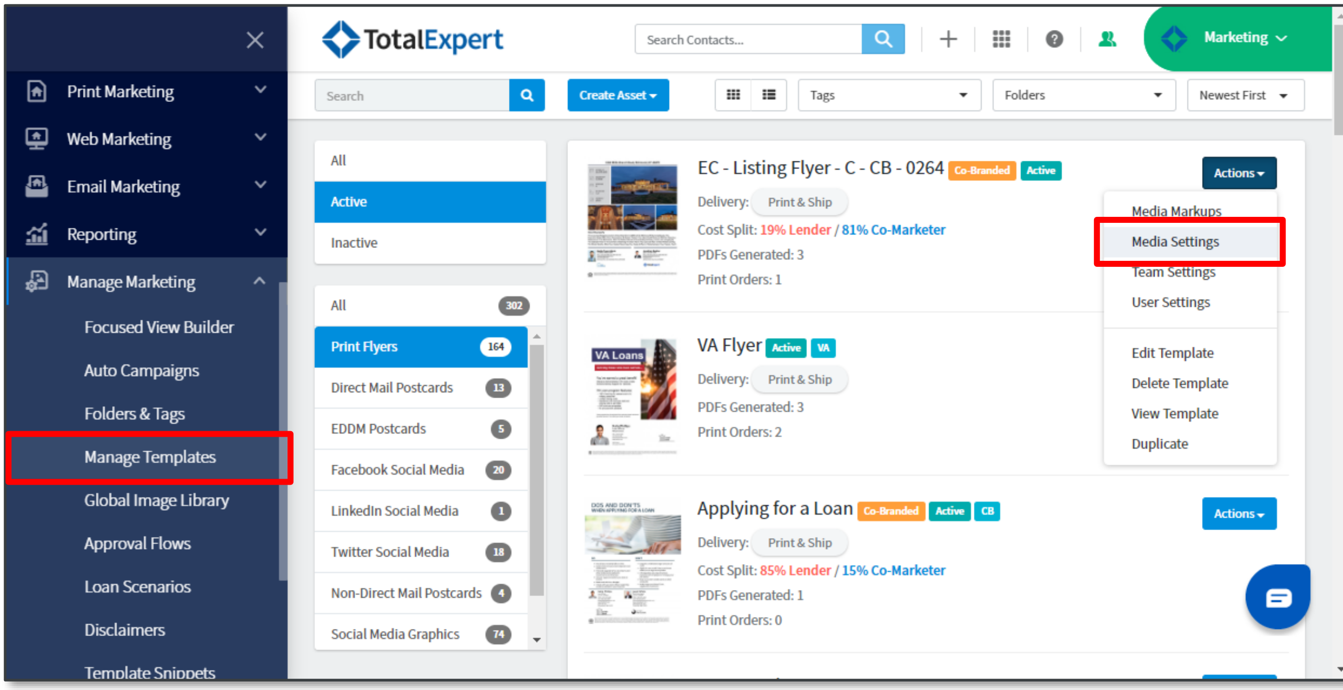
11. If everything passes inspection to this point, including the PDF, check the box in the **Customer Approved** column on the Smartsheet dashboard.
    a. If you need to fail back the asset for any reason, add a comment to the row in the Requests Ready for Customer QA Smartsheet table. Include a thorough description of the problem and applicable screenshots. Tag your TE Content Coordinator or the team (marketingmediateam@totalexpertinc.com) in your comment to ensure they are notified by email.
    b. Any changes to the original design should be submitted as an additional adjustment request, not a failure comment.

Note

If you take no action, the asset is automatically considered approved 2 weeks after entering Customer QA. Any changes needed after that must be submitted as a new adjustment request.

When the QA process is complete, review and update the settings for the new content.

1. Navigate to **Manage Marketing → Manage Templates**.
2. Locate the new content and select **Actions → Media Settings**.



3. Here, you can change any available settings. For example, you can change the Media Name to be more customer-friendly.
   a. For more complete coverage of these settings, attend your admin training and refer to *Content Admin Settings*.

Additional QA Process by Media Type

Self-Serve Template

Go through the typical QA process.

- ☐ Ensure that the contact block layout and spacing are accurate.
- ☐ Ensure that logos, colors, and disclaimers are all populating correctly.
- ☐ Check bleeds in the generated PDF. This would typically be .125 inches on all sides (8.75 by 11.25 inches final dimensions for a print flyer).

Template QA:

- ☐ Ensure that the Duplicate button is visible in the media settings drop-down list.
- ☐ Duplicate the template to ensure testing changes are not made to the original template.
- ☐ Navigate to **Edit Template** in Media Settings and test the Additional/Override Disclaimer functionality. (This is outlined in *Self-Serve Disclaimer Guidelines*.)
- ☐ Test any other custom toggles. These would be discussed and planned beforehand; the only standard toggles are for disclaimers.
- ☐ From the drop-down list next to the Unpublish button, select **Test Dynamic Content** and test different users. Set the preview to the desired user.
- ☐ Add a background image, then save and publish the test template. Ensure that the background image is sized correctly and is not cut off by the content block.
- ☐ Ensure that the template is located in the Templates folder.

MLS Listing Asset

- ☐ Verify that the MLS listing drop-down list appears
- ☐ Select an MLS property and verify that the correct property information is populated.
- ☐ Ensure that editable fields function properly, as indicated in the submitted PDF markup.
- ☐ Check disclaimers if any additional listing verbiage is required for compliance.

Rate Asset

- ☐ Ensure that rates are accurately populated from the pricing engine.
- ☐ Test calculations from editable fields in the Total Payment field.
  - ☐ There is limited editable functionality in rate tables. Simple addition and subtraction calculations are allowed.
  - ☐ Standard editable fields are: mortgage insurance, taxes, insurance, and HOA dues.
  - ☐ Ensure that columns shift properly and data formats correctly.
- ☐ Test a variety of property and product combinations.
  - ☐ Standard loan products are generally not available over $500,000.
  - ☐ Stick to standard loan product options, such as a conforming 30- or 15-year fixed loan with a 20% or higher down payment unless you need to test for specific scenarios.
- ☐ Check disclaimers if any additional listing verbiage is required for compliance.

Email

- ☐ Preview the email in Total Expert either by selecting **Actions → Preview** on the email list or by using Preview Mode in the email sender.
  - ☐ This is helpful to give a quick approximation of how the email will look, but these previews do not run all Liquid logic. Send a copy of the email to yourself to ensure a fully accurate test.
- ☐ Send yourself a test email to see how the email is displayed in specific email platforms.
  - ☐ Select **Test Mode** in the upper-right corner of the email sender.
  - ☐ Select a recipient. Add yourself as a contact if necessary.
  - ☐ Send the message.
  - ☐ Test how the email appears in a variety of platforms and formats, such as Outlook and Gmail. It’s alos helpful to test alternate layouts (desktop, tablet, and mobile).
- ☐ Ensure that the email signature layout and spacing are accurate.