



# Customer QA Documentation

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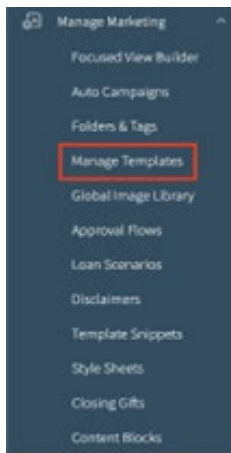
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## Flyer QA Instructions

Once the Total Expert development team completes your custom Flyer Template request, the assigned Content Coordinator will update the Freshdesk ticket status to 'Customer Ready' and notify you that the Flyer Template is ready for testing. You can then move forward with the step-by-step customer QA process below.

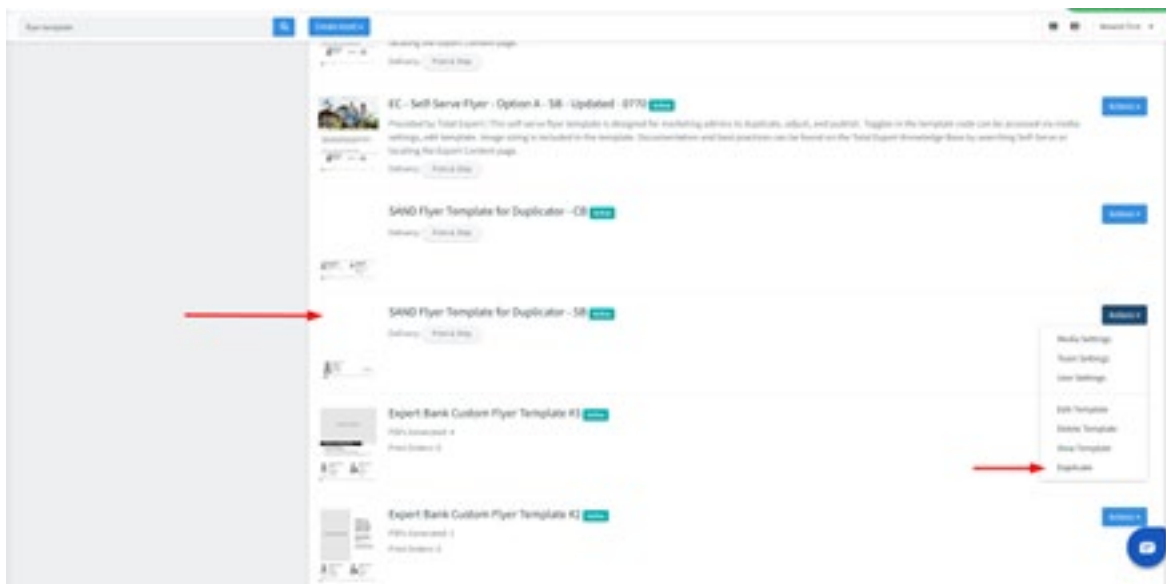
### Step 1

- Log in to Total Expert under the Marketing Admin
- Navigate to Manage Marketing > Manage Templates



## Step 2

- Identify the Flyer Template you are needing to test by typing name in the search box
- Click > Actions > Duplicate.



## Step 3

- Name The Media
- Check duplicate template setting box
- Click duplicate



## Step 4

- Once the template has been duplicated check to ensure the media settings are correct so that your test user will have access to the new asset in their library.
- Make duplicated template *active* within the Media Settings by checking the box.

Media Name*	<input type="text" value="ORG Name Test"/>
Description	<input type="text"/>
Reference Number	<input type="text"/>
Expiration Date	<input type="text"/>
Download/View Link Text <small>Link text shown in Actions menu</small>	<input type="text" value="Download PNG"/>
External Content URL	<input type="text"/>
Auto Archive*	<input checked="" type="radio"/> No <input type="radio"/> Yes
Status	<input checked="" type="checkbox"/> Active

- Allow user access to your test user of choice by searching for the test template via Manage Marketing > Manage Templates
- Click > Actions > User Settings



Actions ▼

Media Settings

Team Settings

User Settings

Edit Template

Delete Template

View Template


Duplicate

## Step 5

- Search for your user in the search box.
- Check the box next to their name.
- Click the Edit Button on the top left corner.



User Settings: ORG Name Test

 (1)

bradley


<input checked="" type="checkbox"/>	First Name	Last Name	Title	Role	Teams	Allow Access	Co-Marketing Partner Access	Proof Appri
<input checked="" type="checkbox"/>	Bradley	Johnson	Loan Officer	Loan Officer	Media Testing Group, Test Team			

## Step 6

- Grant access to the selected flyer Template
- Select > Add Access
- Select > Submit

**EXPERTCONTENT**

User Settings: ORG Name Test

 (1)

<input checked="" type="checkbox"/>	First Name	Last Name	Title	Role	Teams
<input checked="" type="checkbox"/>	Bradley	Johnson	Loan Officer	Loan Officer	Media Testing Group, Test Team

### Media Settings

Note: This form overwrites the settings of the currently selected user(s) and does not reflect their current settings.

Template Access

☒ Add Access  
☐ Deny Access  
☐ Clear Access

Co-Marketer Access

☐ Allow Co-Marketer Access

Proof Approval Process

No Approval

Organization Cost Share %

Organization Cost Share Approver

No Approval



- Once media settings have been confirmed, select edit template at the top of the media settings page.



- [illegible]



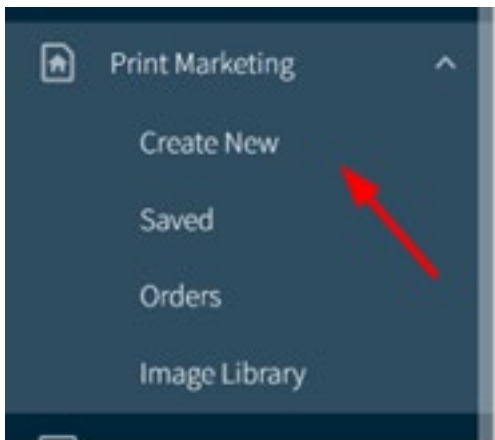
## Step 9

- Once the test image has been added and editable text and toggles have been applied, you can click publish asset. This step will add the test asset to your library.



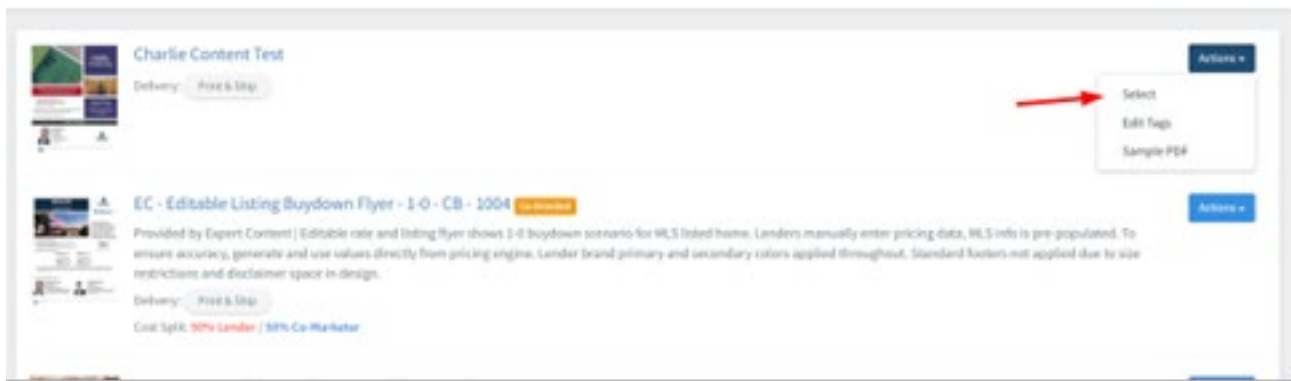
## Step 10

- Once the asset has been published, go to Print Marketing > Create New on the sidebar Select > Add Access.



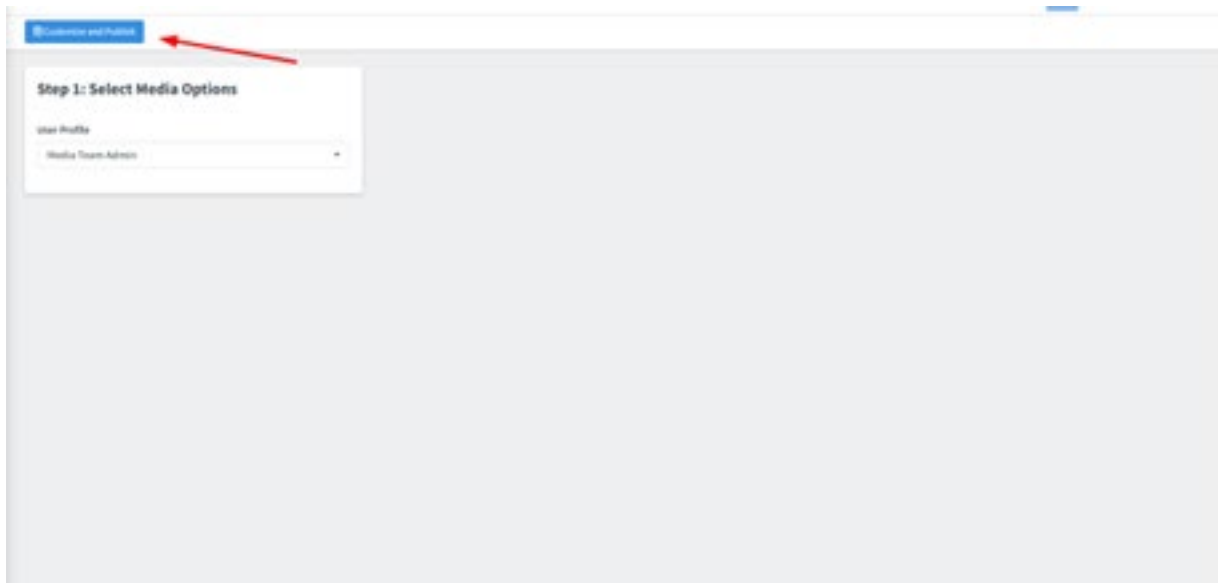
## Step 11

- Type in the name of your test asset in the search bar and click “Select” from the Actions drop down.



## Step 12

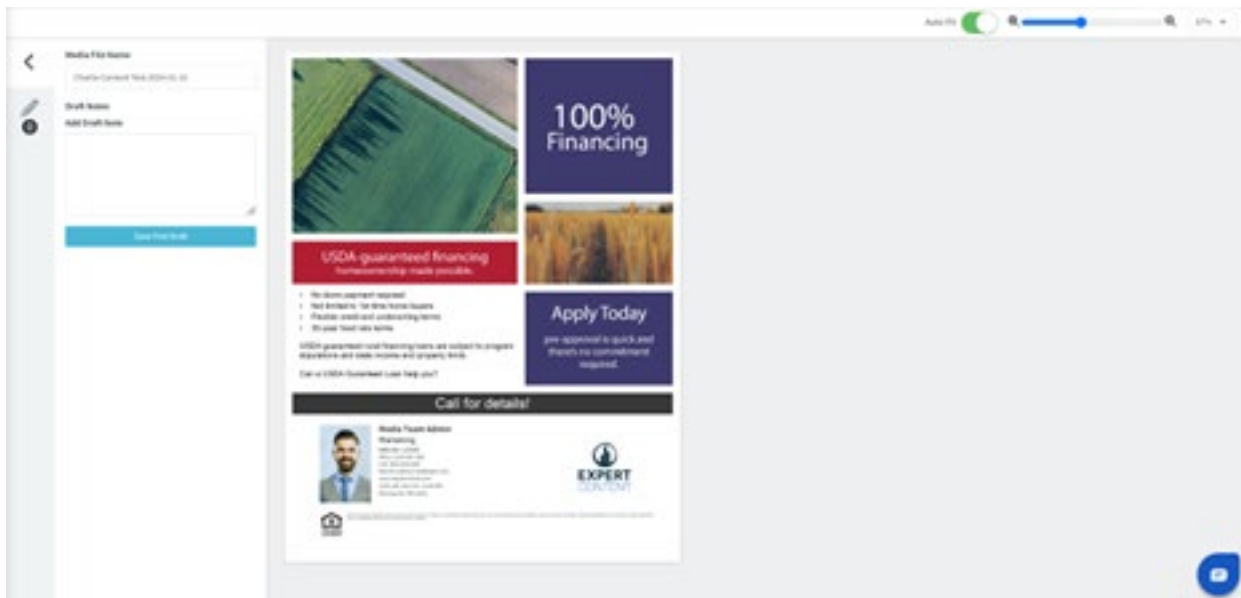
- Confirm the media options are correct then click “Customize and Publish”



## Step 13

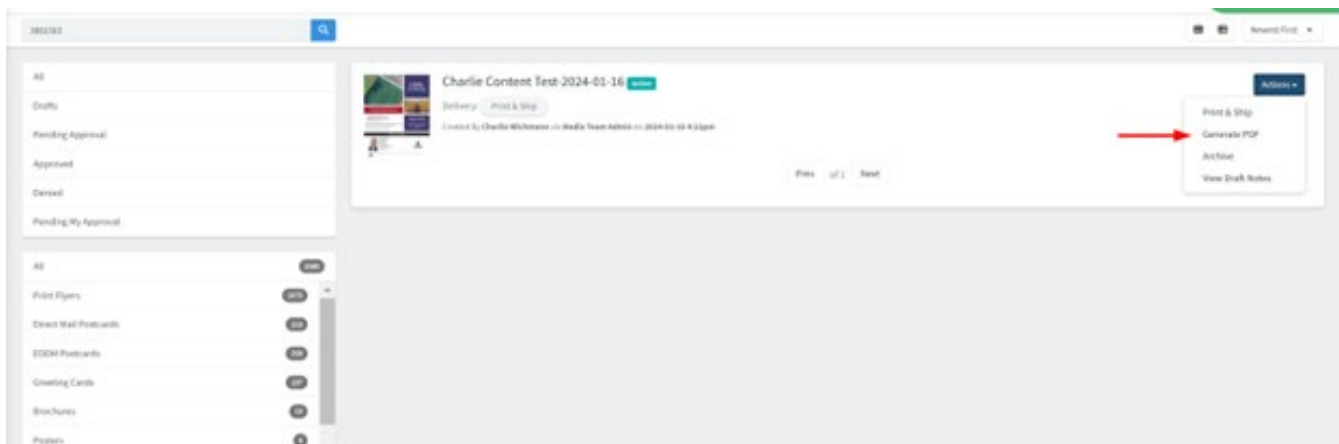
- Review the flyer entirely, ensuring that all elements and fields are displaying and populating as intended.





## Step 14

- Click “Save First Draft”
- Click “Publish”
- Select “Generate PDF” from the actions dropdown



## Step 15

- Review final PDF in its entirety ensuring that all elements and fields are displaying and populating as intended.



# Reporting Issues with Flyer Templates to Total Expert

When reporting an issue with your flyer template, the level of detail you provide is directly proportional to the efficiency and effectiveness of the troubleshooting process. While the list of details we request might seem extensive, each piece of information plays a vital role in diagnosing and resolving the issue accurately.

Here is what to include in your report:

## 1. Clear Description of the Issue:

- **What is the problem?** Describe what you are seeing versus what you expect to see.
- **Where is it occurring?** Specify the part of the template (e.g., name, title, contact information) where the issue appears. Is it occurring in the platform preview or in the generated PDF?

## 2. Visual Evidence:

- **Screenshots:** Attach clear screenshots showing the issue. If possible, highlight the areas of concern.
- **Comparison Images:** If applicable, provide a side-by-side comparison with a correct version of the template.

## 3. Steps to Reproduce:

- A screen recording detailing the exact steps taken to observe the issue. This helps developers recreate the problem on their end.

## 4. Impact Assessment:

- **Scope:** Is the issue affecting a single user or multiple users?
- **Functionality:** Does the problem impact functionality (e.g., dynamic information) or is it purely aesthetic?

## Rate Flyer QA Instructions

### Step 1

- Log into Total Expert under Marketing Admin or a test user connected to the pricing engine.
- Go to Print Marketing > Create New



Dashboard

Leads & Contacts

Co-Marketing Partners

Loans

Activity Stream

Tasks

Campaigns

Journeys

Lead Capture Apps

General Merchandise

Print Marketing

Create New

Saved

Orders

Image Library

Dashboard

OverviewLoan PipelineFunded Loans

0

New Contactspast 24 hours

0

Birthdaysthis week

18

Open Tasks

0

Emails Openedpast 24 hours

Loan Volume (Funded Date)

No Data Available.

## Step 2

- Search for the rate flyer that you want to test.



Rate

Q

Newest First

All751

Print Flyers431

Direct Mail Postcards97

EDDM Postcards57

Greeting Cards68

Brochures5

Posters15

Non-Direct Mail Postcards18

Note Cards10

Find a folder

All Folders

Auto Loan - Drivers Seat

Best Things in Life

Credit Union

DDP Testing

EC - Editable Listing Buydown Flyer - 1-0 - CB - 1004

Co-Branded

Actions

Provided by Expert Content | Editable rate and listing flyer shows 1-0 buydown scenario for MLS listed home. Lenders manually enter pricing data, MLS info is pre-populated. To ensure accuracy, generate and use values directly from pricing engine. Lender brand primary and secondary colors applied throughout. Standard footers not applied due to size restrictions and disclaimer space in design.

Delivery: 

Print & Ship

Cost Split: **50% Lender** / **50% Co-Marketer**

EC - Editable Listing Buydown Flyer - 3-1 - CB - 0900

Co-Branded

Actions

Provided by Expert Content | Lenders can leverage this editable rate and listing flyer to show a 3-1 buydown scenario for a specific home. Lenders will need to manually enter pricing data. To ensure accuracy, generate and use values directly from pricing engine. MLS-integration populates property information and images. Lender brand primary and secondary colors are applied throughout. Standard footers not applied due to size restrictions and additional disclaimer space in design.

Delivery: 

Print & Ship

Cost Split: **50% Lender** / **50% Co-Marketer**

VA Refinancing Streamline Flyer - SB - 0800

Actions

Provided by Expert Content | Leverage this print flyer to educate military members about VA Streamline Refinancing options that may help them save money. Marketing Admins should update the default QR code to the corporate VA refinancing landing page information. QR code may pull from user profile if setup or the user may manually enter a personal QR code during flyer creation.

Delivery: 

Print & Ship

- Click Actions > Select

EC - Rate Flyer - D - Editable - CB - 0270

Co-Branded

2019

Editable

Expert Content

Rate Flyer

Delivery: 

Print & Ship

Cost Split: **50% Lender** / **50% Co-Marketer**

Actions

Select

Edit Tags

Sample PDF

## Step 3

- Choose the co-marketing partner profile you would like to create this flyer with. If a co-marketing partner is not selected, a default TE test user will populate in the co-marketing block.

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## Step 1: Select Media Options

### Co-marketing Partner Profile

Select a Profile ▼

### User Profile

Charlie Content

## Step 4

- Search for a listing using one of the below options:
  - MLS
  - State
  - Zip
  - Agent Name



## Step 2: Search for a Listing to Market

Search By MLS #



Select State\*

For MLS Search

Please Select ▼

Search By Location




Listing Status

Active ▼

Search By Agent Name



- Click select on the property listing you would like to make the flyer for.



2722 Park Avenue,  
Minneapolis, MN 55407

ACTIVE

**Listing Source:** MLS  
**List Agent:** Mohamed Abdulle  
**Brokerage:** Northstar Real Estate Associates  
MLS#6473538 | 0 bed|0 bath |12,671 sqft

Select

## Step 5 (For Optimal Blue)

- Search for pricing options by choosing one of the two options:
  - Customize Pricing Options
  - Use Saved Search
- Click Search Loan Products

**Step 3: Pricing Options**

☒ Customize Pricing Options  
☐ Use Saved Search

Search Loan Products



## Step 6 (For Optimal Blue)

- Update any information under Property and Borrower if needed
- Choose up to 3 loan products

### Loan Products Search up to 3 loan rates

#### Loan Product 1

Conforming 30 Year Fixed

Conforming 10 Year Fixed

Conforming 10/1 ARM

Conforming 15 Year Fixed

Conforming 30 Year Fixed

Conforming 5/1 ARM

Conforming 7/1 ARM

FHA 10 Year Fixed

FHA 10/1 ARM

## Step 7 (For Optimal Blue)

- If debt to income ratio is set to zero, no products will populate in your search.

#### Borrower

Debt-to-Income Ratio \*

40

– +

FICO Score \*

740

First Time Home Buyer?

☒ No

☐ Yes

> [Show More Options](#)

- Click Search Rates to pull the available results





Loan Amount 1 \*

\$ 423,920

Flyer Display Name 1 \*

Conforming 30 Year Fixed

> Show More Options

Loan Product 2

Conforming 15 Year Fixed

Loan Type 2 \*

Conforming

Loan Term 2 \*

15 years

Amortization Type \*

Fixed

Down Payment 2 \*

\$ 105,980

20 %

Loan Amount 2 \*

\$ 423,920

Flyer Display Name 2 \*

Conforming 15 Year Fixed

> Show More Options

Loan Product 3

Please Select

☐ Make this my default search for this template

Cancel

Search Rates

## Step 8 (For Optimal Blue)

- Select Product for each Loan Product

### 1 Select Loan Product 1

	Product Name	Rate	Price	APR	P&I	MI
<input type="radio"/>	U.S. Bank National Association - Correspondent - ...	5.99	100	6.063	2538.89	0
<input type="radio"/>	U.S. Bank National Association - Correspondent - ...	5.99	100	6.063	2538.89	0
<input type="radio"/>	U.S. Bank National Association - Correspondent - ...	6.375	100.106	6.439	2644.71	0
<input type="radio"/>	U.S. Bank National Association - Correspondent - ...	6.375	100.106	6.439	2644.71	0
<input type="radio"/>	Integration Test Investor - Correspondent - FHLM...	6.375	100.106	6.439	2644.71	0
<input type="radio"/>	Integration Test Investor - Correspondent - FHLM...	6.625	100.016	6.699	2714.41	0
<input type="radio"/>	Vendor Demo Investor Conforming 30	7.875	100.281	7.927	3073.71	0

## Step 9 (For Optimal Blue)

- Click Confirm and Create Flyer



1 Select Loan Product 1

	Product Name	Rate	Price	APR	P&I	MI	Total Payment	Closing Cost	Amortization Term	Amortization Type
<input type="radio"/>	U.S. Bank National Association - Correspondent - ...	5.99	100	6.063	2538.89	0	2538.89	3428	30	Fixed
<input type="radio"/>	U.S. Bank National Association - Correspondent - ...	5.99	100	6.063	2538.89	0	2538.89	3428	30	Fixed
<input type="radio"/>	U.S. Bank National Association - Correspondent - ...	6.375	100.106	6.439	2644.71	0	2644.71	2979	30	Fixed
<input type="radio"/>	U.S. Bank National Association - Correspondent - ...	6.375	100.106	6.439	2644.71	0	2644.71	2979	30	Fixed
<input type="radio"/>	Integration Test Investor - Correspondent - FHLM...	6.375	100.106	6.439	2644.71	0	2644.71	2979	30	Fixed
<input type="radio"/>	Integration Test Investor - Correspondent - FHLM...	6.625	100.016	6.699	2714.41	0	2714.41	3360	30	Fixed
<input type="radio"/>	Vendor Demo Investor Conforming 30	7.875	100.281	7.927	3073.71	0	3073.71	2237	30	Fixed

2 Select Loan Product 2

Back to Search

Confirm and Create Flyer

- Click Create Flyer in popup window

00.00.00.00.00.00.00.281

Create Flyer

Loan products and other settings cannot be changed once a flyer is created.

Cancel

Create Flyer

00.00.00.00.00.00.00.2817.9273073.710



## Step 5 (For Polly)

- Select Loan Product and Down Payment amount for up to three loan products

The screenshot shows a web form titled "Step 3: Pricing Options". It contains several dropdown menus for selecting loan details. The first section, "Select Loan Type", has two dropdowns: "30 Year Fixed" and "20%". Below this is a dropdown for "Select Loan Product 2" which is currently open, displaying a list of loan options: "10 Year ARM", "10 Year Fixed", "15 Year Fixed", "20 Year Fixed", "30 Year Fixed", "5 Year ARM", "7 Year ARM", "FHA 15 Year Fixed", and "FHA 30 Year Fixed".

## Step 6 (All Non-OB Integrations)

- Update any information as needed
- Click Search
- Jump to Step 10

## Step 10

- Ensure formatting and information is pulling in and populating correctly (images, disclaimers, property info etc.)



- Update any editable field you would like to make changes to.

## Step 11

- Click Save First Draft

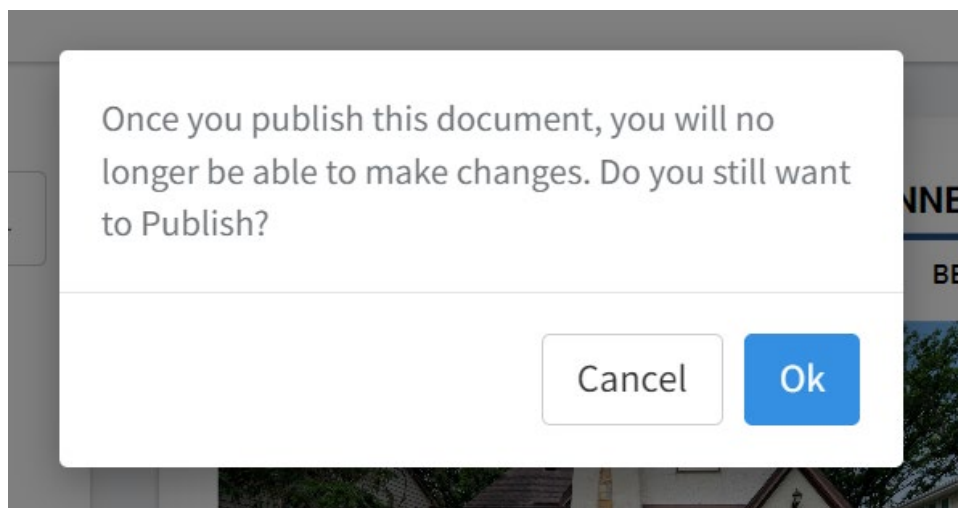
The screenshot shows a sidebar titled "Draft Notes" with a sub-header "Add Draft Note". Below this is a large, empty text input area. At the bottom of the sidebar is a blue button labeled "Save First Draft".

- Then click Publish.

The screenshot shows the same "Draft Notes" sidebar, but now it includes a timestamp "- Nora Kotvis, 2024-01-16 11:06 PM" above the "Add Draft Note" header. Below the text input area are two buttons: a blue "Save Draft" button and a darker blue "Publish" button.

## Step 12

- Click Ok on Popup



## Step 13

- Click Actions > Generate PDF

## Reporting Issues with Flyer Templates to Total Expert

When reporting an issue with your rate flyer template, the level of detail you provide is directly proportional to the efficiency and effectiveness of the troubleshooting process. While the list of details we request might seem extensive, each piece of information plays a vital role in diagnosing and resolving the issue accurately.

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### 2. Visual Evidence:

- **Screenshots:** Attach clear screenshots showing the issue. If possible, highlight the areas of concern.
- **Comparison Images:** If applicable, provide a side-by-side comparison with a correct version of the template.

### 3. Steps to Reproduce:

- A screen recording detailing the exact steps taken to observe the issue. This helps developers recreate the problem on their end.



#### 4. Impact Assessment:

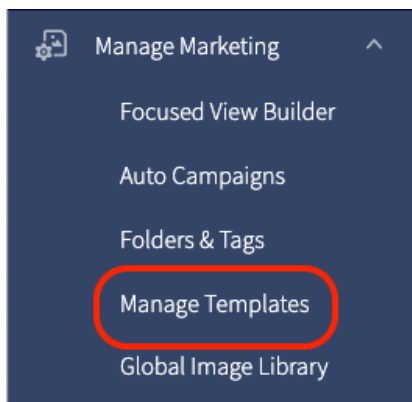
- **Scope:** Is the issue affecting a single user or multiple users?
- **Functionality:** Does the problem impact functionality (e.g., dynamic information) or is it purely aesthetic?

## Postcard QA Instructions

Once a custom Postcard request has been completed by Total Expert, the Content Coordinator assigned to the request will update the Freshdesk ticket status to 'Customer Ready' and will then notify you that the Postcard is ready for testing. You can then proceed through the customer QA step-by-step process below.

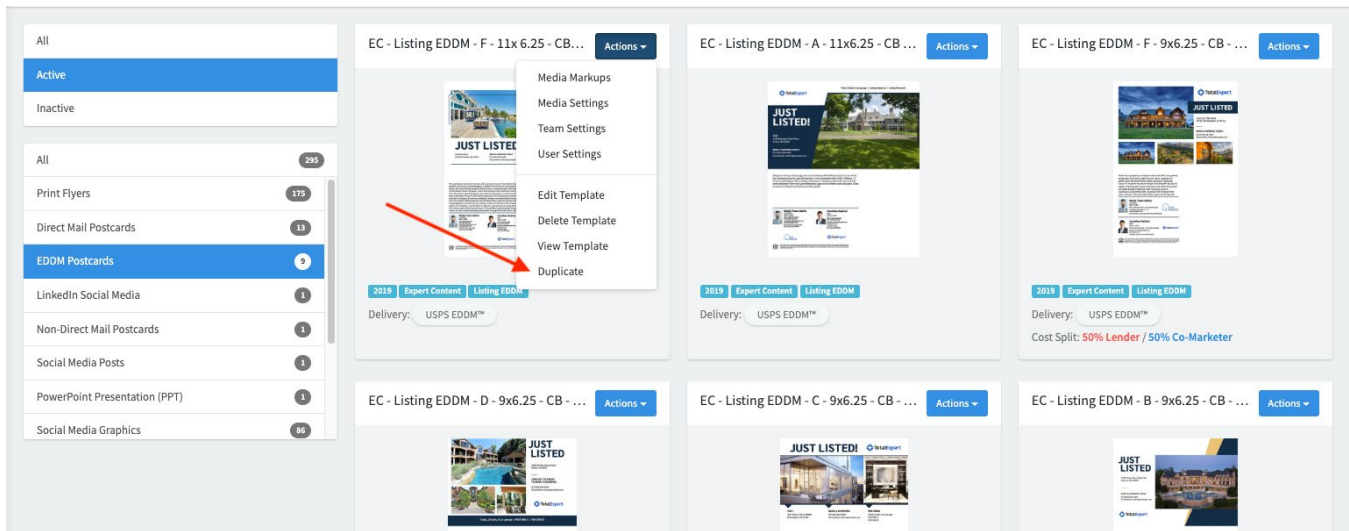
### Step 1

- Log in to the TE account you will use to test the Postcard (Marketing Admin or a designated test user).
- Navigate to **Manage Marketing > Manage Templates**



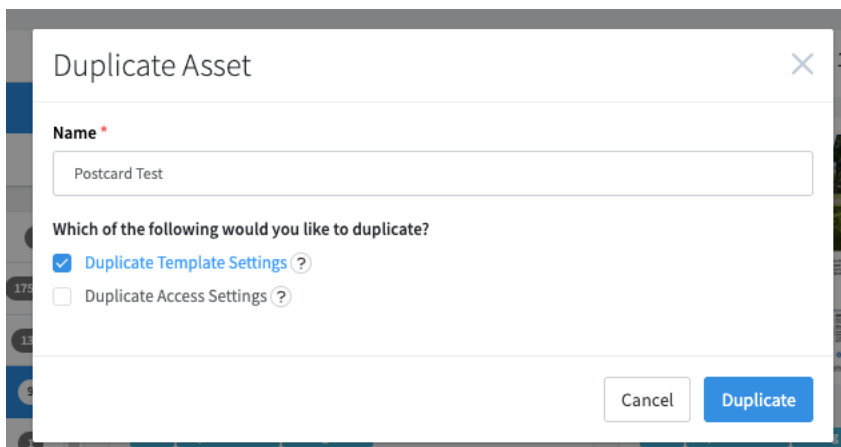
### Step 2

- Search for the Postcard that you need to test.
- Click **Actions > Duplicate**.



### Step 3

- Name the Asset
- Check > **Duplicate Template Setting** box
- Click > **Duplicate**



### Step 4

- Once the template has been duplicated check Media Settings to ensure that your end user will have access to the asset in their library.
- Once Media Settings has been reviewed select edit template at the top left of the page.

Save Media

Edit Template

Delete Template

WYSIWYG Template

Media Settings

Default User Settings

Default user settings apply to all users in this organization. Settings can be overridden on the Team Settings or User Settings page.

Access <small>Can be overridden for specific users</small>	This piece must have an active Media Markup before it can be assigned.
Co-Marketing Partner Access	This piece must have an active Media Markup before it can be assigned.
Proof Approval Process	No Approval Required
Organization Cost Share % <small>(Percentage of the user's share covered by the organization)</small>	0
Organization Cost Share Approver <small>(User responsible for approving organization cost share)</small>	Select a User

## Step 5

- Once on the edit template page, on the left-hand side ensure that all requested toggles are functioning as intended.
- Add or override disclaimers if applicable. Instructions can be found here: [Self-Serve Disclaimer Guide](#)
- A test image can be added to the asset. A test image is important to ensure that sizing is accurate, and all elements populate.
- To add an image, click > **Change Image** > **Drop or upload an image** > **Click update Main Image**.
- Once the image is updated, check that the front and back of the Postcard looks as intended, then click **Publish**.





## Postcard Test

Publish

Save



```
1  {{ template.stylesheets }}
2  {% include 'expert_content_branding' %}
3  {% assign is_textarea_editable = 'yes' %}
4
5
6  <div class="pc front cover-image">
7
8
9      <div class="agent-logo-top contain-image editable-image" style="background-image: url('{{ agent
10     .logo_image }}');"></div>
11     <div class="main-image editable-image cover-image" style="background-image: url('{{ listing.images
12     .0 }}');"></div>
13     <div class="image1 editable-image cover-image" style="background-image: url('{{ listing.images.1
14     }}');"></div>
15     <div class="image2 editable-image cover-image" style="background-image: url('{{ listing.images.2
16     }}');"></div>
17     <div class="image3 editable-image cover-image" style="background-image: url('{{ listing.images.3
18     }}');"></div>
19     <div class="image4 editable-image cover-image" style="background-image: url('{{ listing.images.4
20     }}');"></div>
21
22     <div class="brand-primary-bg-color lvt"></div>
23     <div class="brand-primary-bg-color lht"></div>
24
25     <div class="brand-primary-bg-color rhm"></div>
26     <div class="brand-primary-bg-color rvb"></div>
27     <div class="brand-primary-bg-color rhb"></div>
28
29     <p class="just-listed brand-primary-color editable">JUST LISTED</p>
30     <p class="address editable">{{ listing.address }}<br>{{ listing.city }}, {{ listing.state }} {{
31     listing.zip }}</p>
32
33     <p class="contact-text editable"><span class="cta">BOOK A SHOWING TODAY!</span><br>
34     (P) {% if agent.phone_office %}{{ agent.phone_office }}{% elsif agent.phone_cell%}{{ agent
35     .phone_cell }}{% else %}XXX-XXX-XXXX{% endif %}<br>
36     (E) {{ agent.email }}
```

## Postcard Test

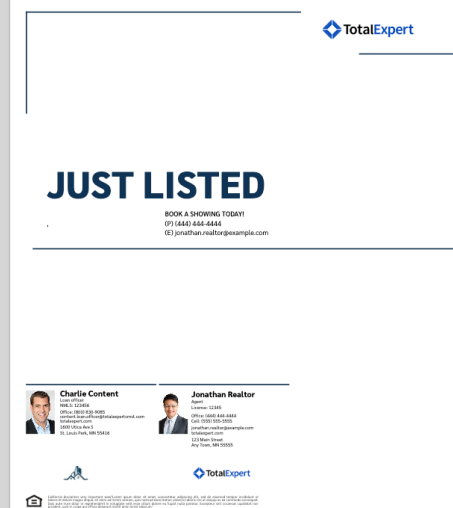
Publish

Save



Change Image

```
1  {{ template.stylesheets }}
2  {% include 'expert_content_branding' %}
3  {% assign is_textarea_editable = 'yes' %}
4
5
6  <div class="pc front cover-image">
7
8
9      <div class="agent-logo-top contain-image editable-image" style="background-image: url('{{ agent
10     .logo_image }}');"></div>
11     <div class="main-image editable-image cover-image" style="background-image: url('{{ listing.images
12     .0 }}');"></div>
13     <div class="image1 editable-image cover-image" style="background-image: url('{{ listing.images.1
14     }}');"></div>
15     <div class="image2 editable-image cover-image" style="background-image: url('{{ listing.images.2
16     }}');"></div>
17     <div class="image3 editable-image cover-image" style="background-image: url('{{ listing.images.3
18     }}');"></div>
19     <div class="image4 editable-image cover-image" style="background-image: url('{{ listing.images.4
20     }}');"></div>
21
22     <div class="brand-primary-bg-color lvt"></div>
23     <div class="brand-primary-bg-color lht"></div>
24
25     <div class="brand-primary-bg-color rhm"></div>
26     <div class="brand-primary-bg-color rvb"></div>
27     <div class="brand-primary-bg-color rhb"></div>
28
29     <p class="just-listed brand-primary-color editable">JUST LISTED</p>
30     <p class="address editable">{{ listing.address }}<br>{{ listing.city }}, {{ listing.state }} {{
31     listing.zip }}</p>
32
33     <p class="contact-text editable"><span class="cta">BOOK A SHOWING TODAY!</span><br>
34     (P) {% if agent.phone_office %}{{ agent.phone_office }}{% elsif agent.phone_cell%}{{ agent
35     .phone_cell }}{% else %}XXX-XXX-XXXX{% endif %}<br>
36     (E) {{ agent.email }}
```

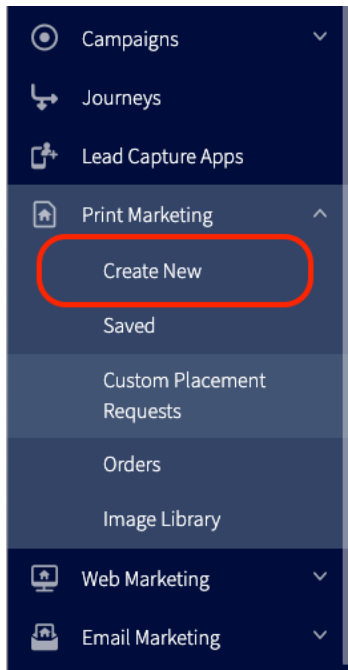




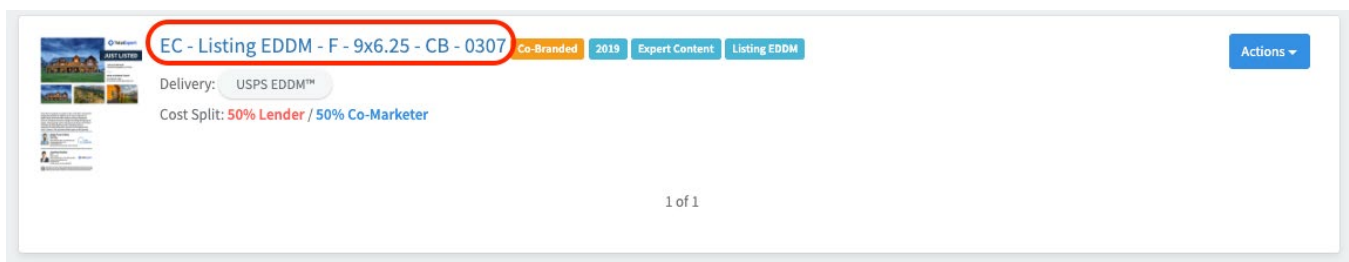
- Ensure the new Postcard status is set to **active** under media settings. You can now follow instructions 6 – 9 below for testing your new Postcard.

## Step 6

- Navigate to **Print Marketing > Create New**.



- Identify the Postcard you want to test and click the name or **Actions dropdown > Select**.



When selecting a Postcard verify that:

- The correct thumbnail is shown in the Total Expert list. If the thumbnail is not appearing, try clearing your cache first before reporting it to your coordinator.
- The **Co-Branded** tag is applied to the Postcard (if applicable).



- The Postcard is shown in the correct folder (if applicable).

Troubleshooting notes:

- If the Postcard is not appearing in the library, go to **Manage Marketing > Manage Templates**
- 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.
- This should be done before assigning the Team settings or the User settings, as the team or user will not display until a cost split is assigned.

## Step 7

- If the Postcard is Co-Branded, select an option in the **Co-marketing Partner Profile** dropdown list (The User Profile drop-down list should automatically select the current user). If a Co-marketing partner is not selected, the co-marketing information will default to a TE user.
- Click **Customize and Publish**.

Customize and Publish

**Step 1: Select Media Options**

Color Scheme

Default

Co-marketing Partner Profile

Select a Profile

User Profile

Marketing Admin

- Once you have reviewed the Postcard, click **Save First Draft**.



#### Media File Name

EC - Listing EDDM - F - 9x6.25 - CB - 0307-2024-02-

#### Draft Notes

##### Add Draft Note

Save First Draft

## Step 8

- After saving, click the **Publish** button. The page will refresh to Print Marketing > Saved with the list filtered to show only the piece you just created.

#### Media File Name

EC - Listing EDDM - F - 9x6.25 - CB - 0307-2024-02-

#### Draft Notes

- Sidnie Adams, 2024-02-15 1:45 PM

##### Add Draft Note

Save Draft

Publish

## Step 9

- If the Postcard is a Listing Postcard follow the step-by-step instructions below:
- Select desired Listing Postcard. **Actions > Select.**



EC - Listing EDDM - F - 9x6.25 - CB - 0307 Co-Branded 2019 Expert Content Listing EDDM

Delivery: USPS EDDM™

Cost Split: 50% Lender / 50% Co-Marketer

1 of 1

Actions ▾

- Select
- Edit Tags
- Sample PDF

To test:

- Search by MLS#
- Select State
- Search by Location (zip code)
- Select Listing Status
- Search by Agent Name

**Step 2: Search for a Listing to Market (optional)**

Search By MLS #

Select State\*

For MLS Search

Please Select ▴

Search By Location

Listing Status

Active ▾

Search By Agent Name

- Select listing on the right side.



915 Alyce Ct, Carson City, NV 89701

ACTIVE

**Listing Source:** MLS

**List Agent:** Devin Murphy

**Brokerage:** 1919

MLS#240001144 | 4 bed|3 bath |2,694 sqft

Select

- Click **Customize and Publish** in the top left corner.

Customize and Publish

Nevada

Search By Location

89701

Listing Status

Active

Search By Agent Name

915 Alyce Ct, Carson City, NV 89701

ACTIVE

**Listing Source:** MLS

**List Agent:** Devin Murphy

**Brokerage:** 1919

MLS#240001144 | 4 bed|3 bath |2,694 sqft

Select

## Step 10



- Test any editable images and text. Here you can edit font size, font color, and verbiage. If there is a functionality issue, let your designated content coordinator know.
- Once you have tested and the Postcard is functioning correctly, click **Save First draft**

Media File Name  

EC - Listing EDDM - F - 9x6.25 - CB - 0307-2024-02-

Draft Notes  
Add Draft Note  

Save First Draft

## Reporting Issues with Postcard Templates to Total Expert

When reporting an issue with your postcard template, the level of detail you provide is directly proportional to the efficiency and effectiveness of the troubleshooting process. While the list of details we request might seem extensive, each piece of information plays a vital role in diagnosing and resolving the issue accurately.

Here is what to include in your report:

### 1. Clear Description of the Issue:

- **What is the problem?** Describe what you are seeing versus what you expect to see.
- **Where is it occurring?** Specify the part of the template (e.g., name, title, contact information, background image, text field if applicable) where the issue appears. Is it occurring in the platform preview or the generated PDF?

### 2. Visual Evidence:

- **Screenshots:** Attach clear screenshots showing the issue. If possible, highlight the areas of concern.
- **Comparison Images:** If applicable, provide a side-by-side comparison with a correct version of the template.



### 3. Steps to Reproduce:

- A screen recording detailing the exact steps taken to observe the issue. This helps developers recreate the problem on their end.

### 4. Impact Assessment:

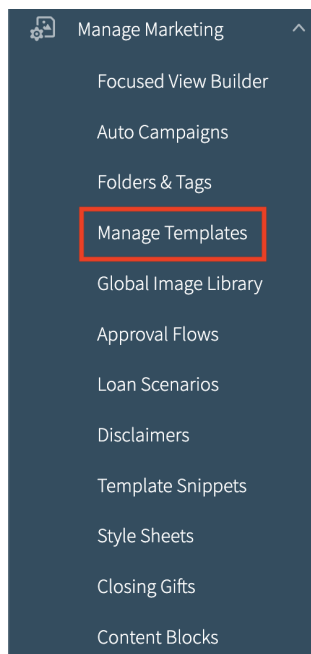
- **Scope:** Is the issue affecting a single user or multiple users?
- **Functionality:** Does the problem impact functionality (e.g., dynamic information) or is it purely aesthetic?

## Social Template QA Instructions

Once the Total Expert development team completes your custom social template, the Content Coordinator assigned to the request will update the Freshdesk ticket status to 'Customer Ready' and will then notify you that the social template is ready for testing. You can then proceed through the customer QA step-by-step process below.

### Step 1

- Log in to Total Expert under the Marketing Admin
- Navigate to Manage Marketing > Manage Templates

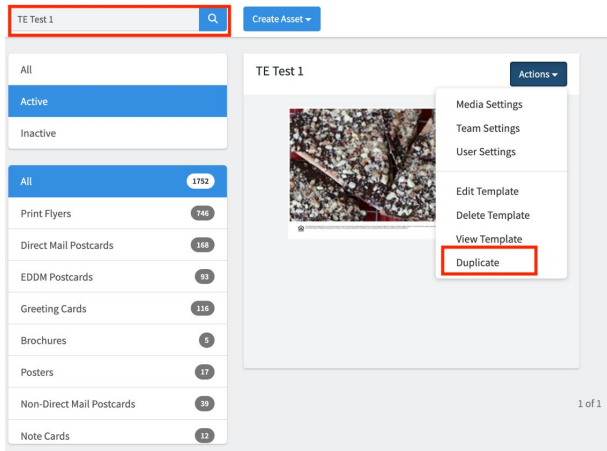






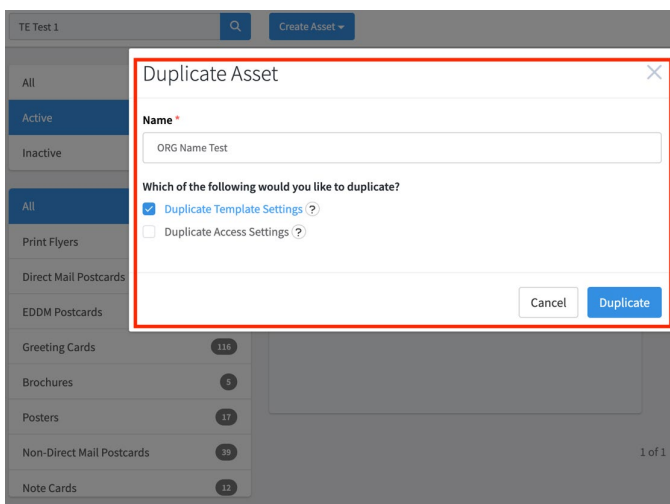
## Step 2

- Identify the Social Template you need to test by typing the name in the search box.
- Click > Actions > Duplicate.
  - Best Practice Tip: Duplicating the custom templates prevents permanent changes from being made to the original item.



## Step 3

- Type in a name for your duplicated item.
- Check > Duplicate Template Settings
- Click > Duplicate





## Step 4

- Make duplicated social template *active* within Media Settings by checking the box.

Media Name*	<input type="text" value="ORG Name Test"/>
Description	<input type="text"/>
Reference Number	<input type="text"/>
Expiration Date	<input type="text"/>
Download/View Link Text <small>Link text shown in Actions menu</small>	<input type="text" value="Download PNG"/>
External Content URL	<input type="text"/>
Auto Archive*	<input checked="" type="radio"/> No <input type="radio"/> Yes
Status	<input checked="" type="checkbox"/> Active

## Step 5

- Allow user access to your test user of choice by searching for the test template via Manage Marketing > Manage Templates
- Click > Actions > User Settings

Actions ▾

Media Settings

Team Settings

User Settings

Edit Template

Delete Template

View Template

Duplicate



## Step 6

- Search for your user in the search box.
- Check the box next to their name.
- Click the Edit Button on the top left corner.

User Settings: ORG Name Test

<input checked="" type="checkbox"/>	First Name	Last Name	Title	Role	Teams	Allow Access	Co-Marketing Partner Access	Proof Appr
<input checked="" type="checkbox"/>	Bradley	Johnson	Loan Officer	Loan Officer	Media Testing Group, Test Team			

## Step 7

- Grant access to the selected Social Template
- Select > Add Access
- Select > Submit



User Settings: ORG Name Test

(1)

First Name Last Name Title Role Year

Bradley Johnson Loan Officer Loan Officer Med

### Media Settings

Note: This form overwrites the settings of the currently selected user(s) and does not reflect their current settings.

**Template Access**  
☒ Add Access  
☐ Deny Access  
☐ Clear Access

Co-Marketer Access ☐ Allow Co-Marketer Access

Proof Approval Process No Approval

Organization Cost Share %

Organization Cost Share Approver No Approval

## Step 8

- Test Social Template under the selected user log in
- Log in to the user selected and out of the Marketing Admin account.
- Navigate to Web Marketing > Social Media > Create New

**TOTAL EXPERT**

Journeys

Lead Capture Apps

Print Marketing

Web Marketing

Single Property Sites

**Social Media**

Create New

Saved

Scheduled / Posted

Dynamic Landing Pages

### Dashboard

Overview Loan Pipeline Funded Loans

0 New Contacts past 24 hours

0 Birthdays this week

\$0.00 Loan Pipeline

0 Expiring Pre-Approvals next 30 days

5 Open Tasks

0 Emails Opened past 24 hours

\$0.00 Closed Loan Volume YTD

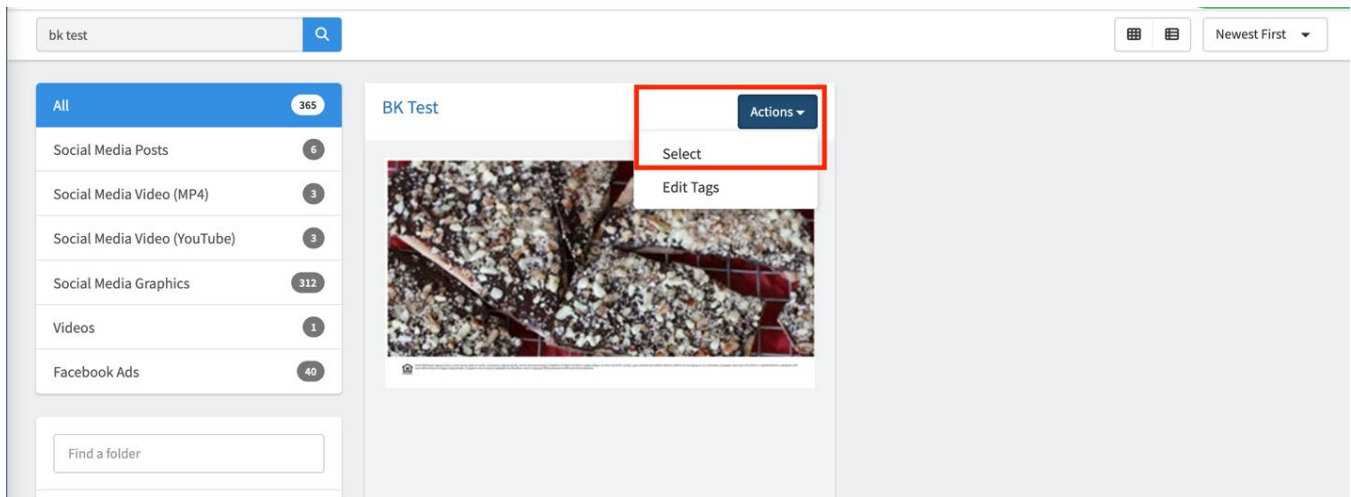
3 Co-Marketing Partners

Loan Volume (Funded Date)

Recent Activity Last 30 days View Activity Stream

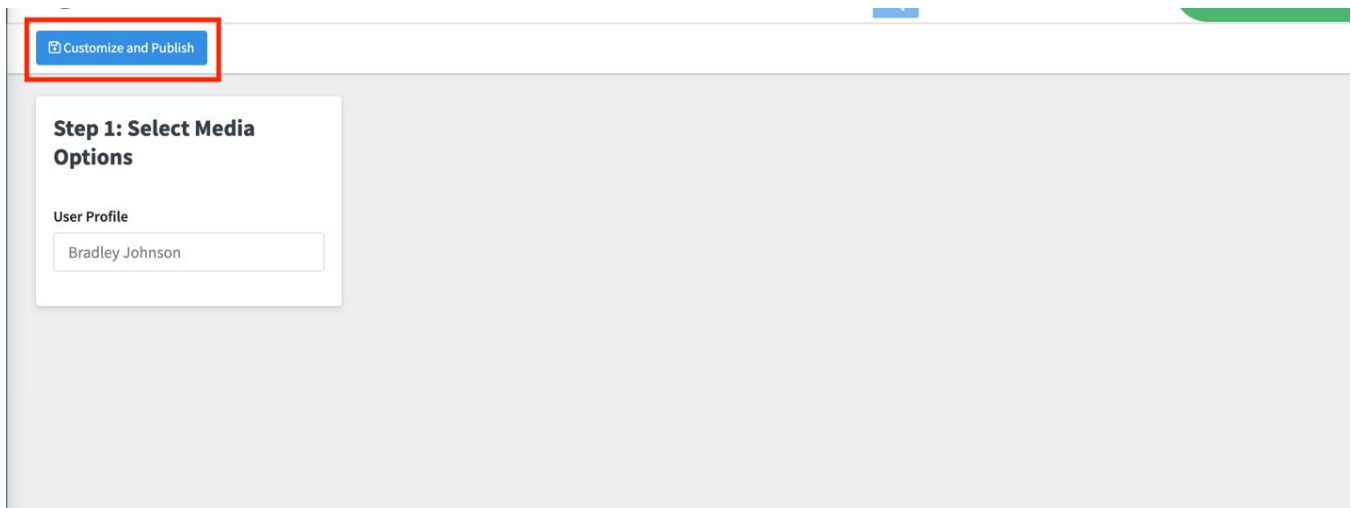
## Step 9

- Search for the Test Social Template in the search box
- Click > Actions > Select.



## Step 10

- Click > Customize and Publish in the top left corner.



## Step 11

- Verify the Social Template is functioning, including disclaimers and any dynamic fields from the designs provided.



- Once tested, click > Save First Draft

The screenshot shows the 'Media File Name' section with the text 'ORG Name Test- 2023-12-28'. Below this is the 'Draft Notes' section, which is currently empty. A red rectangular box highlights the 'Save First Draft' button at the bottom of the draft notes area. The interface also features a top bar with 'Auto-Fit' toggle, a zoom slider, and a zoom level of 25%.

## Step 12

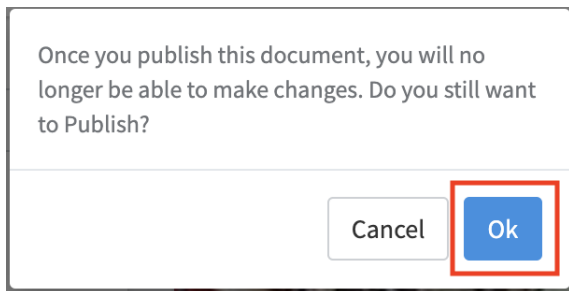
- Select Publish

The screenshot shows the 'Media File Name' section with the text 'ORG Name Test- 2023-12-28'. Below this is the 'Draft Notes' section, which now contains a note: '- Harpreet Singh, 2023-12-28 5:52 PM'. A red rectangular box highlights the 'Publish' button at the bottom of the draft notes area. The interface also features a top bar with 'Auto-Fit' toggle, a zoom slider, and a zoom level of 57%.

## Step 13



- Once the Social Template is published, it cannot be changed.
- A notification will generate after you click “Publish”
- Click Ok



## Step 14

- Once template is published, user will have the option to generate a PNG.
- Click > Actions > Generate PNG
- PNG will be generated in a separate page and can be used as desired.
- This [link](#) in our knowledge base includes a video outlining steps to share social assets on various platforms.

## Reporting Issues with Social Media Templates to Total Expert

When reporting an issue with your social media template, the level of detail you provide is directly proportional to the efficiency and effectiveness of the troubleshooting process. While the list of details we request might seem extensive, each piece of information plays a vital role in diagnosing and resolving the issue accurately.

Here is what to include in your report:

### 1. Clear Description of the Issue:

- **What is the problem?** Describe what you are seeing versus what you expect to see.
- **Where is it occurring?** Specify the part of the template (e.g., background image, text field if applicable) where the issue appears. Is it occurring in the platform preview or in the generated PNG?

### 2. Visual Evidence:

- **Screenshots:** Attach clear screenshots showing the issue. If possible, highlight the areas of concern.



- **Comparison Images:** If applicable, provide a side-by-side comparison with a correct version of the template.

### 3. Steps to Reproduce:

- A screen recording detailing the exact steps taken to observe the issue. This helps developers recreate the problem on their end.

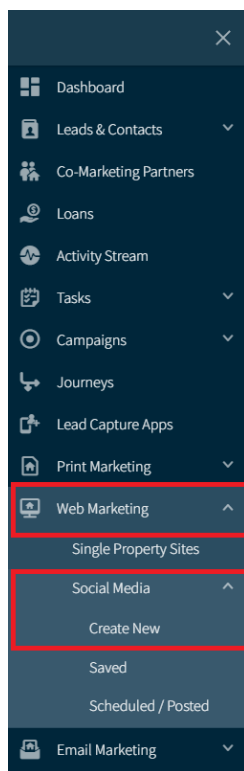
### 4. Impact Assessment:

- **Scope:** Is the issue affecting a single user or multiple users?
- **Functionality:** Does the problem impact functionality (e.g., dynamic information) or is it purely aesthetic?

## Social Asset QA Instructions

### Step 1

- Log in to Total Expert under the Marketing Admin
- Select Web Marketing > Social Media > Create New

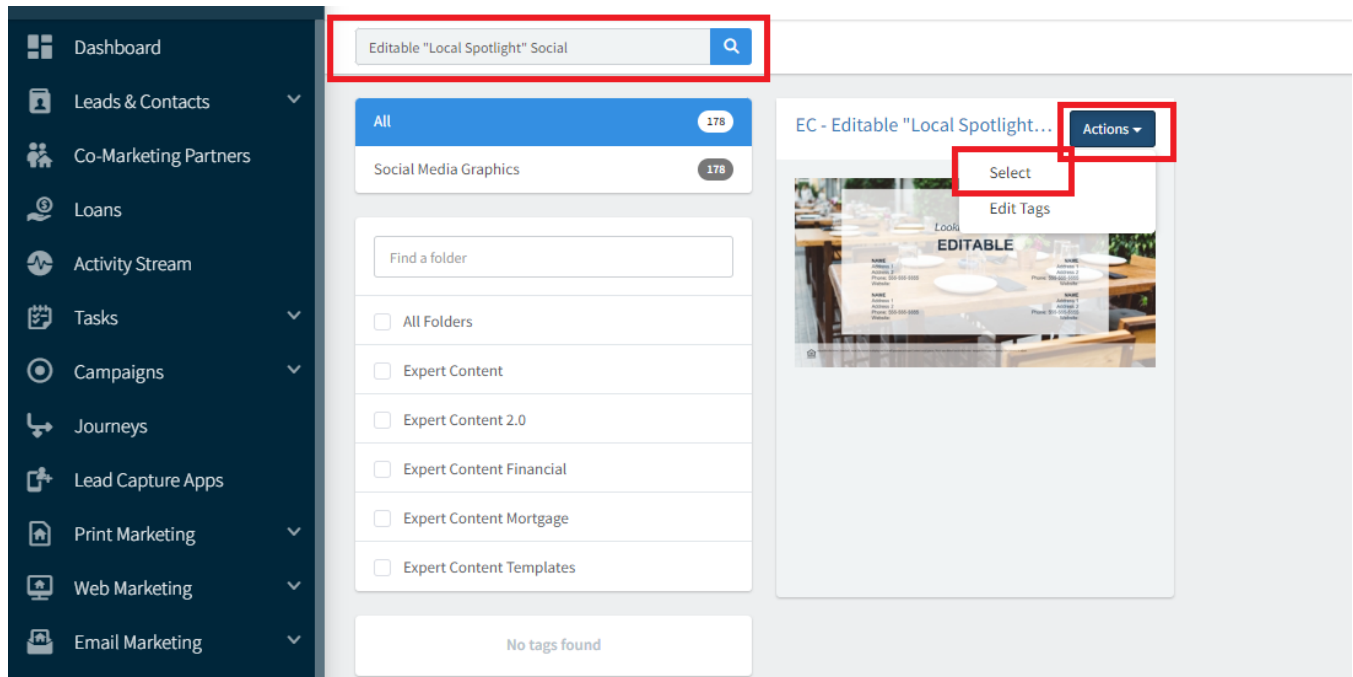






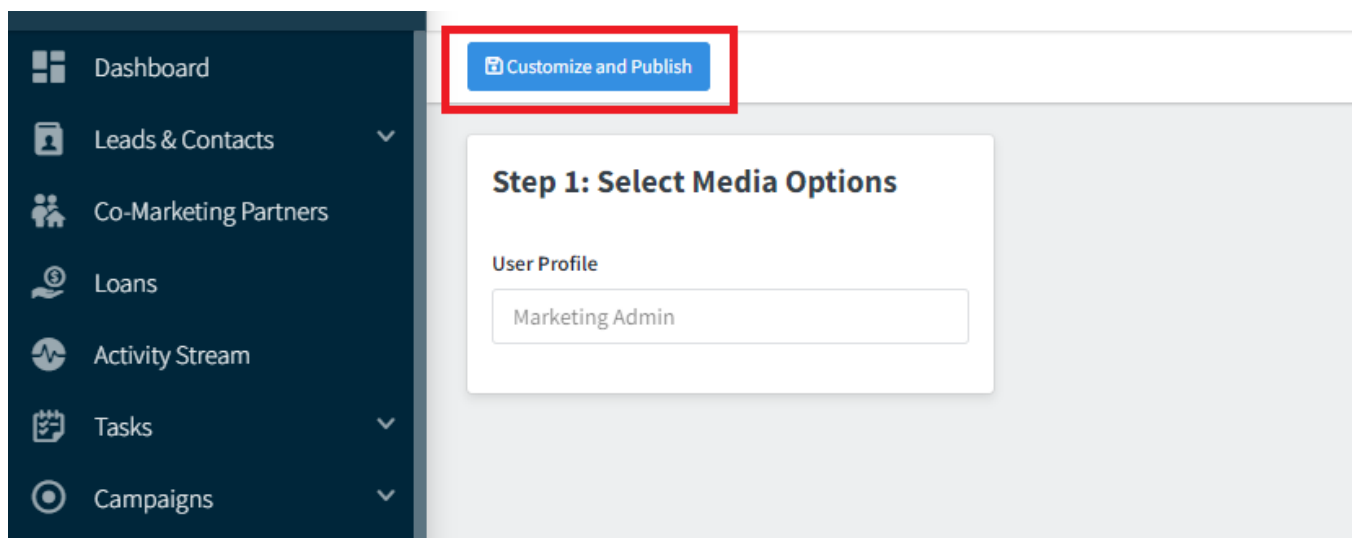
## Step 2

- Search the name of your Editable Social piece in the search bar.
- Then select Actions > Select



## Step 3

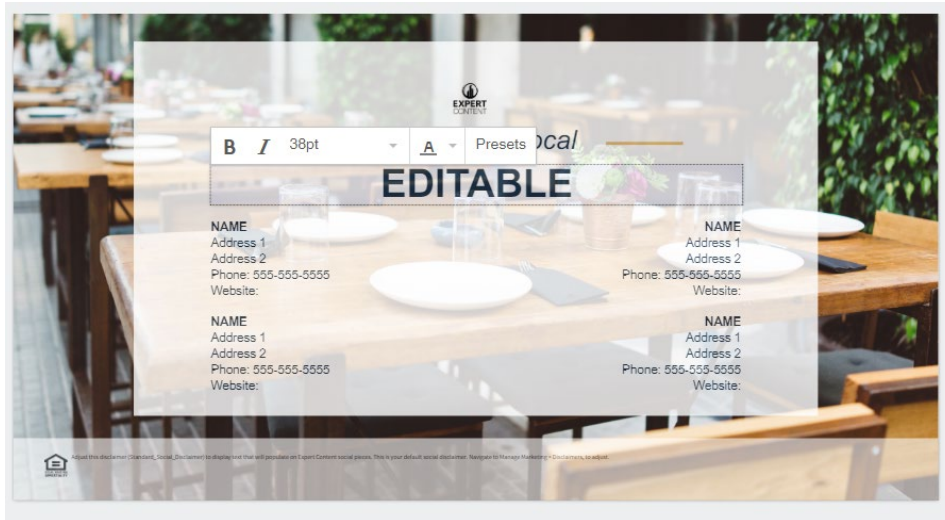
- Select Customize and Publish





## Step 4

- Verify any dynamic content in the body is populating correctly (company name, email address, physical address, date, etc.)
- Verify the correct fields are editable and have the correct placeholder text or picture.



## Step 5

- Verify Test the editable fields by replacing placeholder text or photos.
- For text, apply new text to test that it will fit within the text box without overlap or cutoff. Test the font functionalities to see Bold, Italics, Font Size and Text Color are working correctly.
- For photos, apply new photo and ensure the photo formats correctly and fills the editable space.



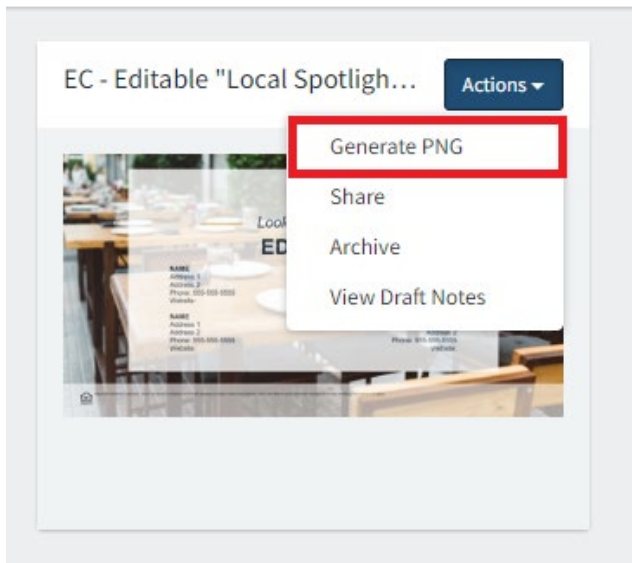
## Step 6

- Save Draft and Publish.



## Step 7

- Select Actions > Generate PNG. Review PNG to ensure that all editable fields changed have saved the change and nothing is being cutoff.



## Reporting Issues with Social Asset to Total Expert

When reporting an issue with your social asset, the level of detail you provide is directly proportional to the efficiency and effectiveness of the troubleshooting process. While the list of details we request might seem extensive, each piece of information plays a vital role in diagnosing and resolving the issue accurately.

Here is what to include in your report:

### 1. Clear Description of the Issue:

- **What is the problem?** Describe what you are seeing versus what you expect to see.
- **Where is it occurring?** Specify the part of the template (e.g., background image, text field if applicable) where the issue appears. Is it occurring in the platform preview or the generated PNG?

### 2. Visual Evidence:

- **Screenshots:** Attach clear screenshots showing the issue. If possible, highlight the areas of concern.
- **Comparison Images:** If applicable, provide a side-by-side comparison with a correct version of the template.

### 3. Steps to Reproduce:

- A screen recording detailing the exact steps taken to observe the issue. This helps developers recreate the problem on their end.

### 4. Impact Assessment:

- **Scope:** Is the issue affecting a single user or multiple users?
- **Functionality:** Does the problem impact functionality (e.g., dynamic information) or is it purely aesthetic?



# Email QA Instructions

## Emails Overview

- **Email Clients:** Applications like Outlook, Gmail, Apple Mail, that let you send, receive, and manage emails.
- **How Emails Are Built:** HTML and CSS coding languages are used, which ensure they appear consistently across most email clients. However, these coding languages come with design limitations, restricting how creatively elements can be arranged within the signature.
- **Optimization Across Clients:**
  - Emails created in Total Expert are specifically optimized for a variety of popular email platforms, including Outlook, Gmail, Apple Mail, Yahoo Mail, and Android Email.
  - Despite this optimization, emails may display slightly differently across these platforms due to their individual rendering rules.

## Testing Best Practices

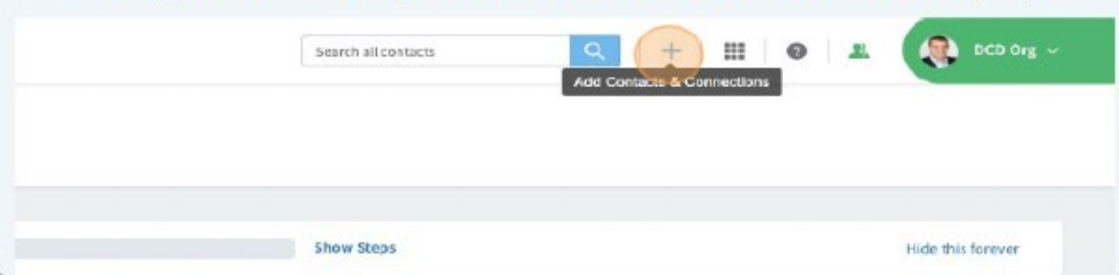
**Environment Testing:** The assessment of an email signatures performance across different systems and platforms, such as various operating systems, devices, and browsers, to ensure it works consistently and as intended for all users.

- **Viewing Modes:** Evaluate in different modes (dark and light).
- **Responsiveness:** Ensure readability and proper layout on desktop, mobile and tablet devices.
- **Cross-Client Testing:** Test across various email clients such as Gmail, Outlook, and Yahoo.
- **Operating Systems:** Mac vs PC.
- **Browsers:** A software application used to access and navigate the internet such as Google Chrome or Mozilla Firefox.

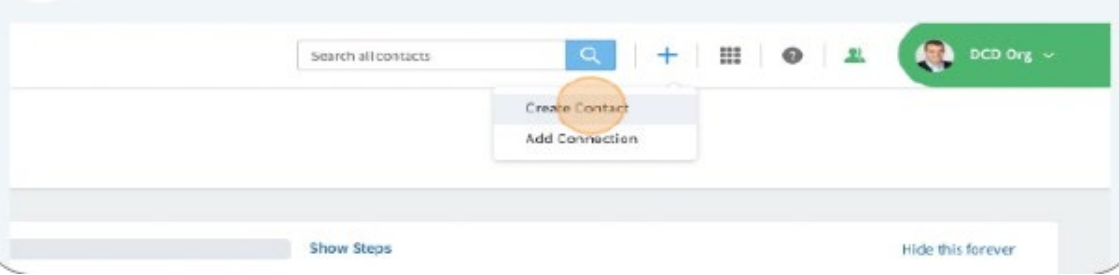
## Step-by-Step QA Process



1 If you have not already created a contact associated with the your email address, navigate to the Total Expert Dashboard and click the "+" button on the top right.



2 Click "Create Contact"



3 Enter your first name, last name and email.

Form fields for contact information:

- Title
- First Name
- Last Name
- Nickname

4 Click "Save"

Screenshot of the Total Expert dashboard showing the 'Contact Info - Name' form with the 'Save' button highlighted by an orange circle. The form contains the following data:

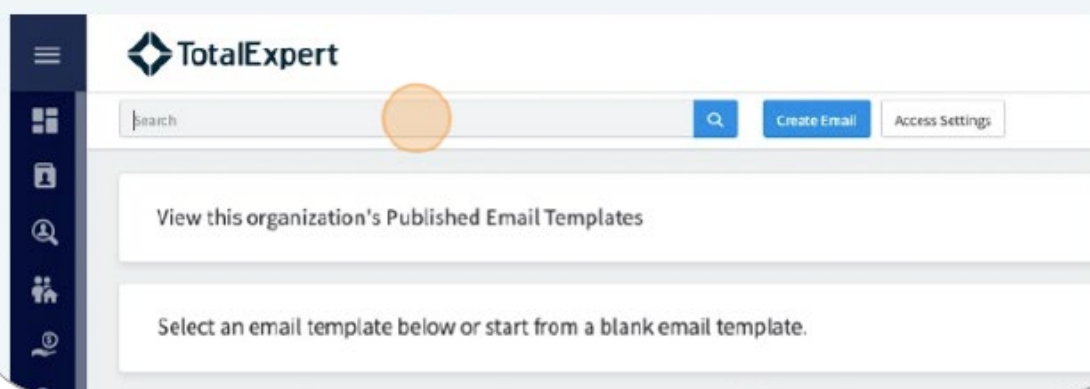
Contact Info - Name	
Title	
First Name	Jane
Last Name	Doe



5 Navigate to "Email Marketing" and click "Emails"



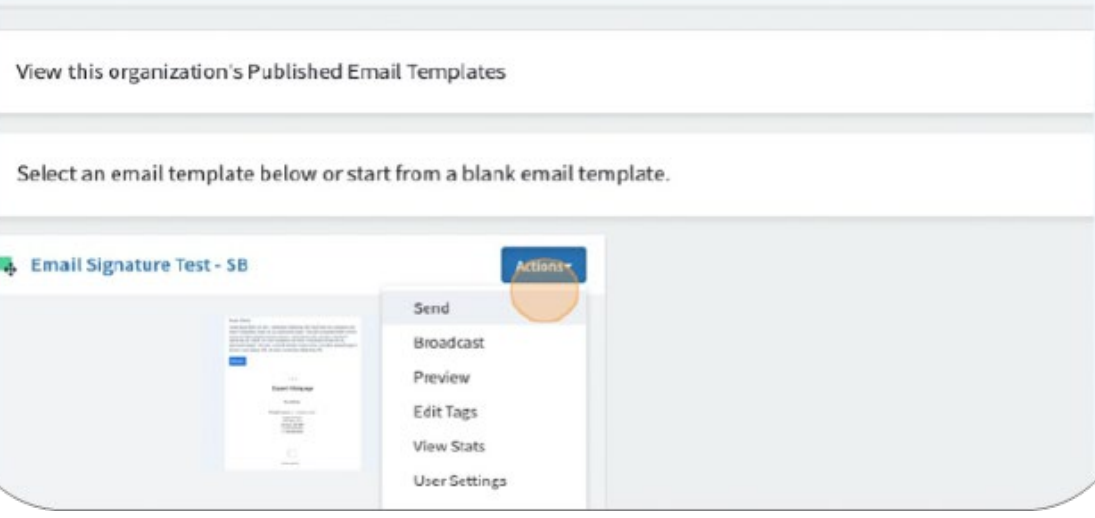
6 Click the "Search" field and type the name of the test email provided by your coordinator in the FreshDesk ticket.



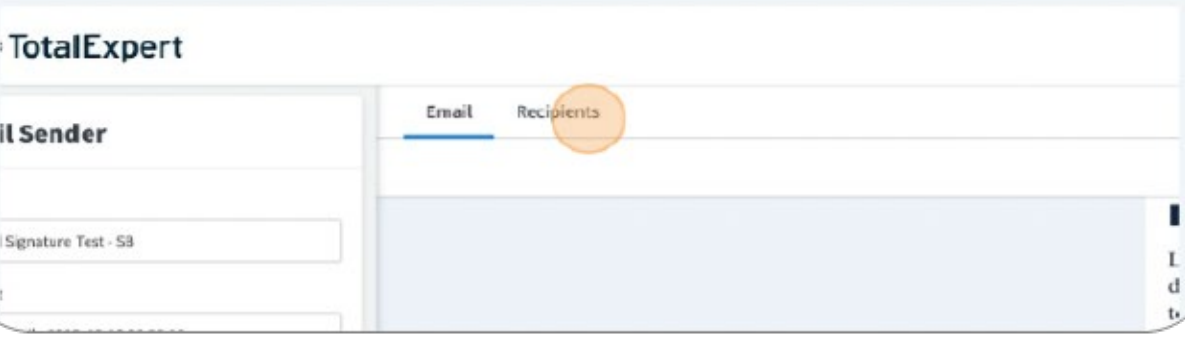




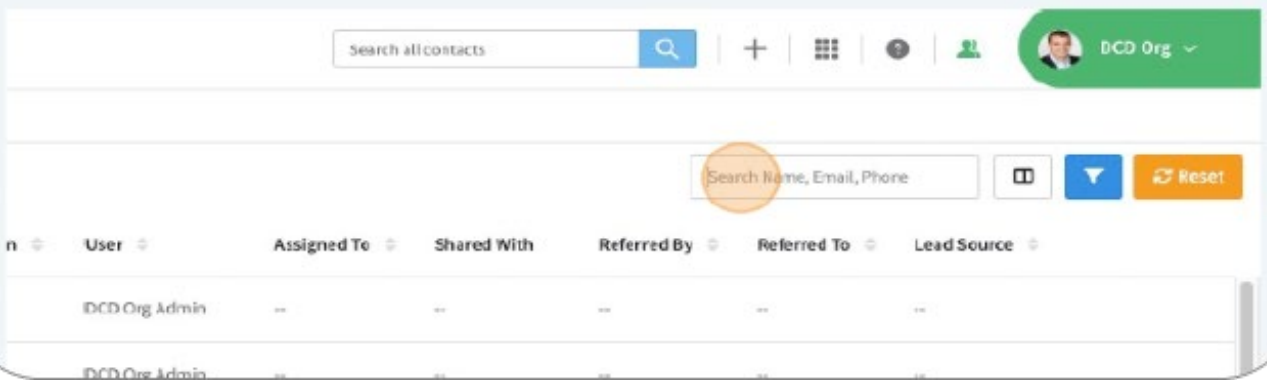
7 Click "Actions", then "Send".



8 Click "Recipients"



9 Click the "Search Name, Email, Phone" field and search for the contact you just created.







## 10 Select the appropriate contact.

**TotalExpert**

**Email Sender**

Name  
Email Signature Test - S8

Subject  
New Email - 2020-03-12 00:35:15

Preheader Text ?

**Recipients**

<input type="checkbox"/>	First Name	Last Name	Email
<input checked="" type="checkbox"/>	Jane	Doe	janedoe@example.com

## 11 Click the test mode button, this will allow you to send more than one email within a 24 hour period for testing.

Date  
12/20/2023

Time  
01:55 pm

☐ Append Email Signature

**Test Mode ?**  
☐ OFF

Preview Send Email

## 12 Click "Send Email"

Date  
12/28/2023

Time  
01:55 pm

☐ Append Email Signature

**Test Mode ?**  
☒ ON

Preview Send Email



## How to View the Email

After you have successfully hit “Send Email” you will want to follow the next steps to ensure it appears accurately within your email in box.

- **Open the Email:** Locate the test email in your inbox. The email will have “TEST MODE” within the subject line.
- **Review Content:** Check for accurate display of text, images, and overall layout. Ensure “Show Blocked Content” is enabled and “Download Images” if needed.
- **Note Differences:** If anything looks off, make a note of it for potential troubleshooting.

## Reporting Issues with Email Signatures to Total Expert

When reporting an issue with your email signature, the level of detail you provide is directly proportional to the efficiency and effectiveness of the troubleshooting process. While the list of details we request might seem extensive, each piece of information plays a vital role in diagnosing and resolving the issue accurately. **Do not forward emails with issues for reporting purposes, as forwarding can alter the email's code and mask the original problem.**

Here is what to include in your report:

1. **Clear Description of the Issue:**
  - **What is the problem?** Describe what you are seeing versus what you expect to see.
  - **Where is it occurring?** Specify the part of the signature (e.g., name, title, contact information, social media icons) where the issue appears.
2. **Visual Evidence:**
  - **Screenshots:** Attach clear screenshots showing the issue. If possible, highlight the areas of concern.
  - **Comparison Images:** If applicable, provide a side-by-side comparison with a correct version of the signature.
3. **Environmental Details:**
  - **Email Client and Version:** Include the name and version of the email client where the issue was spotted.
  - **Operating System and Version:** Note the operating system and version used when the issue occurred.
  - **Device Information:** Indicate whether the issue was on desktop, mobile, or tablet, including the make and model if relevant.
  - **Browser:** Include the name of the browser you are viewing the email in, if applicable.
4. **Steps to Reproduce:**
  - A screen recording detailing the exact steps taken to observe the issue. This helps developers recreate the problem on their end.
5. **Impact Assessment:**
  - **Scope:** Is the issue affecting a single user or multiple users?

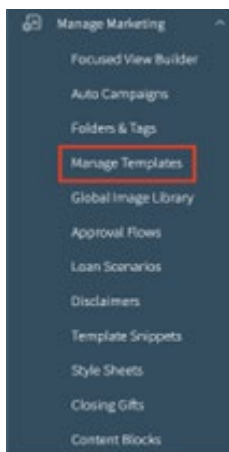


- **Functionality:** Does the problem impact functionality (e.g., broken links) or is it purely aesthetic?

## Greeting Card QA Instructions

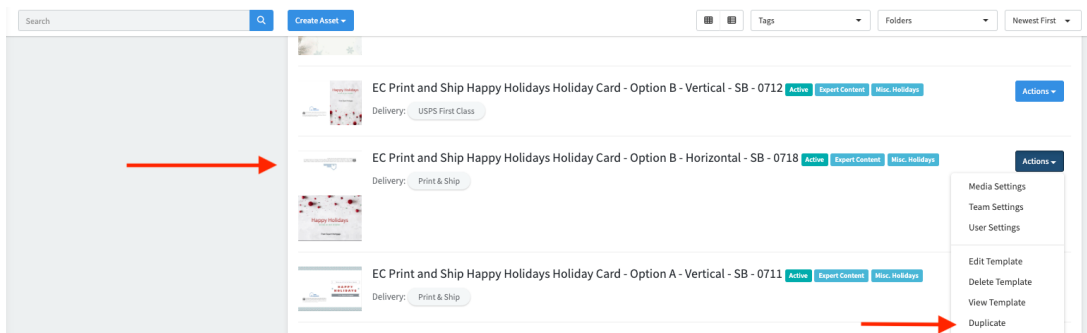
### Step 1

- Log in to Total Expert under the Marketing Admin
- Navigate to Manage Marketing > Manage Templates



### Step 2

- Identify the Flyer Template you are needing to test by typing name in the search box
- Click > Actions > Duplicate.





## Step 3

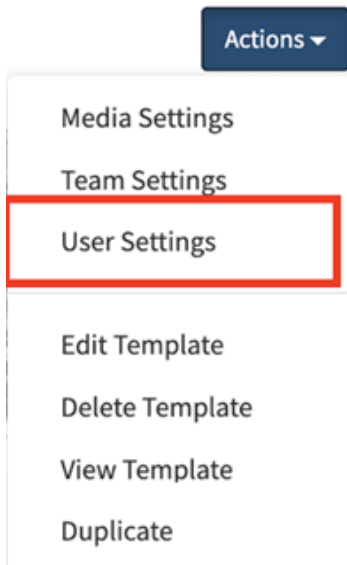
- Name The Media
- Check duplicate template setting box
- Click duplicate

## Step 4

- Once the template has been duplicated check to ensure the media settings are correct so that your test user will have access to the new asset in their library.
- Make duplicated template *active* within the Media Settings by checking the box.

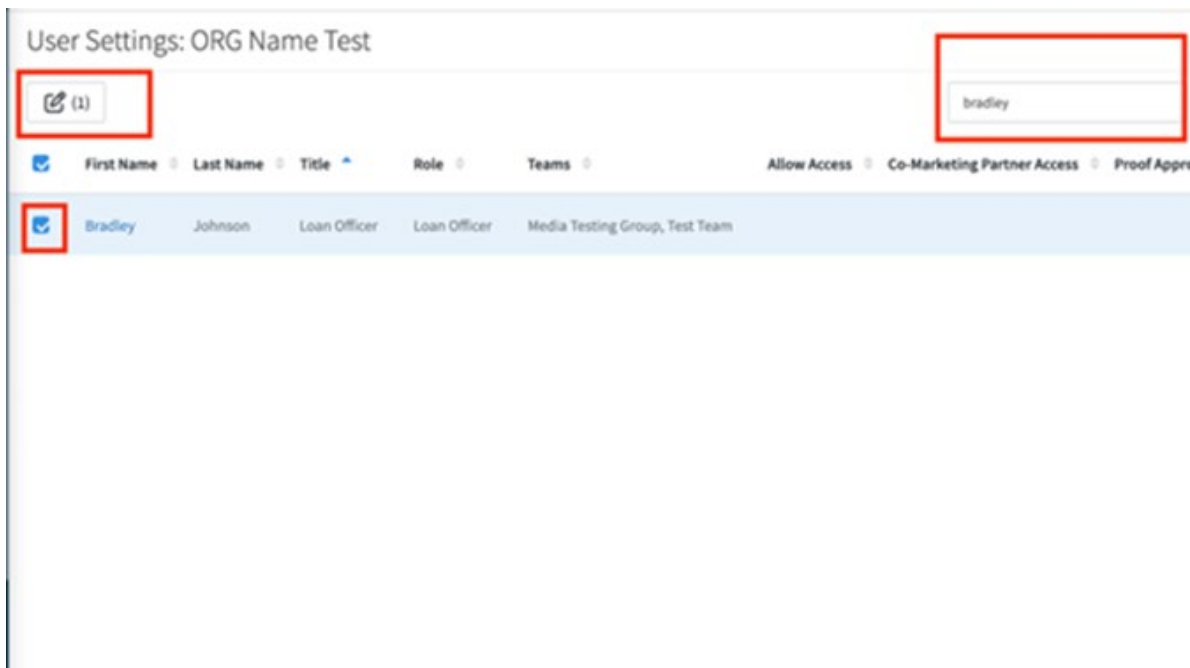
Media Name*	<input type="text" value="GRG Name Test"/>
Description	<input type="text"/>
Reference Number	<input type="text"/>
Expiration Date	<input type="text"/>
Download/View Link Text <small>Link text shown in Actions menu</small>	<input type="text" value="Download PNG"/>
External Content URL	<input type="text"/>
Auto Archive*	<input checked="" type="radio"/> No <input type="radio"/> Yes
Status	<input checked="" type="checkbox"/> Active

- Allow user access to your test user of choice by searching for the test template via Manage Marketing > Manage Templates
- Click > Actions > User Settings



## Step 5

- Search for your user in the search box.
- Check the box next to their name.
- Click the Edit Button on the top left corner.





## Step 6

- Grant access to the selected greeting card
- Select > Add Access
- Select > Submit

User Settings: ORG Name Test

Media Settings

Note: This form overwrites the settings of the currently selected user(s) and does not reflect their current settings.

Template Access

☒ Add Access

☐ Deny Access

☐ Clear Access

Co-Marketer Access

☐ Allow Co-Marketer Access

Proof Approval Process

No Approval

Organization Cost Share %

Organization Cost Share Approver

No Approval

## Step 7

- Once media settings have been confirmed, select edit template at the top of the media settings page.

Save Media Edit Template Delete Template WYSIWYG Template

Media Settings

Happy Holidays

From Expert Mortgage

Media Name\* ORG Name Test

Default User Settings

Default user settings apply to all users in this organization. Settings can be overridden on the Team Settings or User Setting

Access

Can be overridden for specific users

☐ Grant access to all users

Co-Marketing Partner Access

☐ Grant access to co-marketing partners

Proof Approval Process

No Approval Required

Organization Cost Share %

(Percentage of the user's share covered by the organization)

0

Organization Cost Share Approver

(User responsible for approving organization cost share)

Select a User

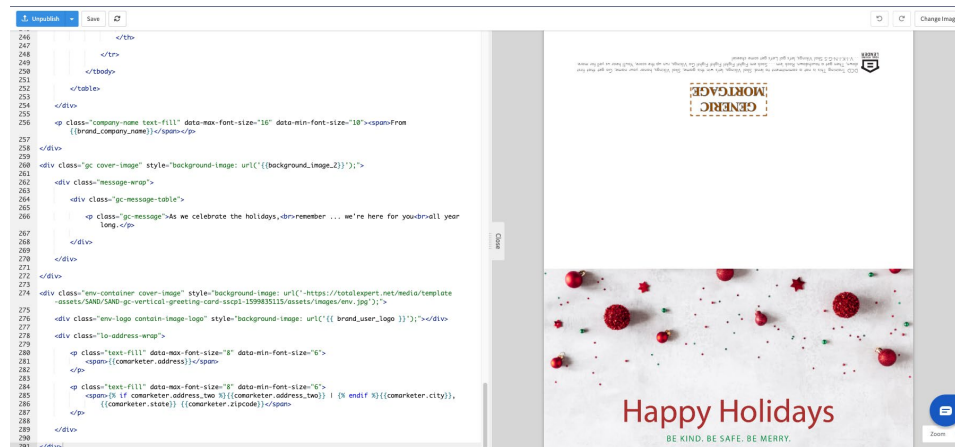


## Step 8

- Once in the template editing page make sure that all requested toggles and editable fields are present and functioning as intended.
- Toggle functionality page can be found here: [Toggle Checklist](#)
- A test image can also be added in this step to ensure that everything populates into the template as intended.
- TE's self-serve guide can assist with adding images ([Self-Serve Guide](#))
- 

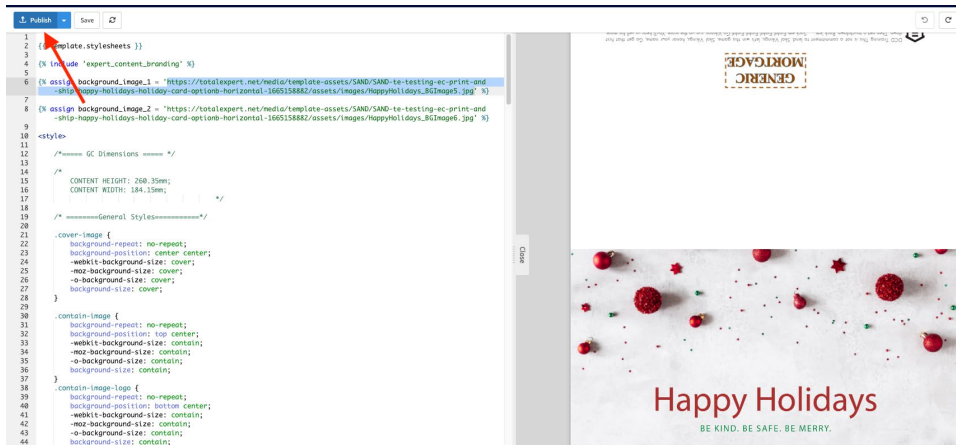
### Note

The generated PDF will be in a print-ready orientation. The 2<sup>nd</sup> page will be upside down.



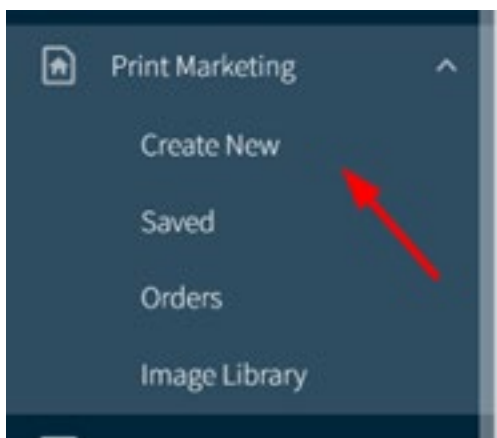
## Step 9

- Once the test image has been added and editable text and toggles have been applied, you can click publish asset. This step will add the test asset to your library.



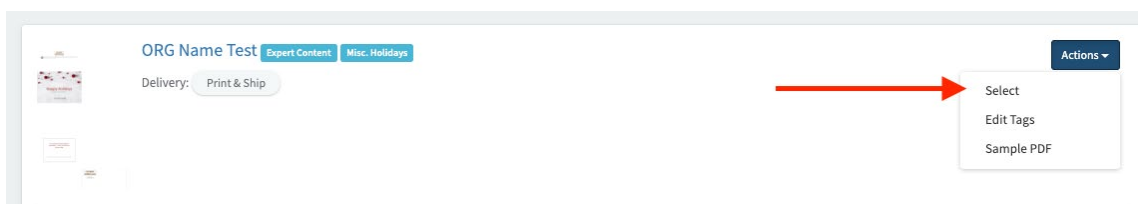
## Step 10

- Once the asset has been published, go to Print Marketing > Create New on the sidebar Select > Add Access.



## Step 11

- Type in the name of your test asset in the search bar and click "Select" from the Actions drop down.

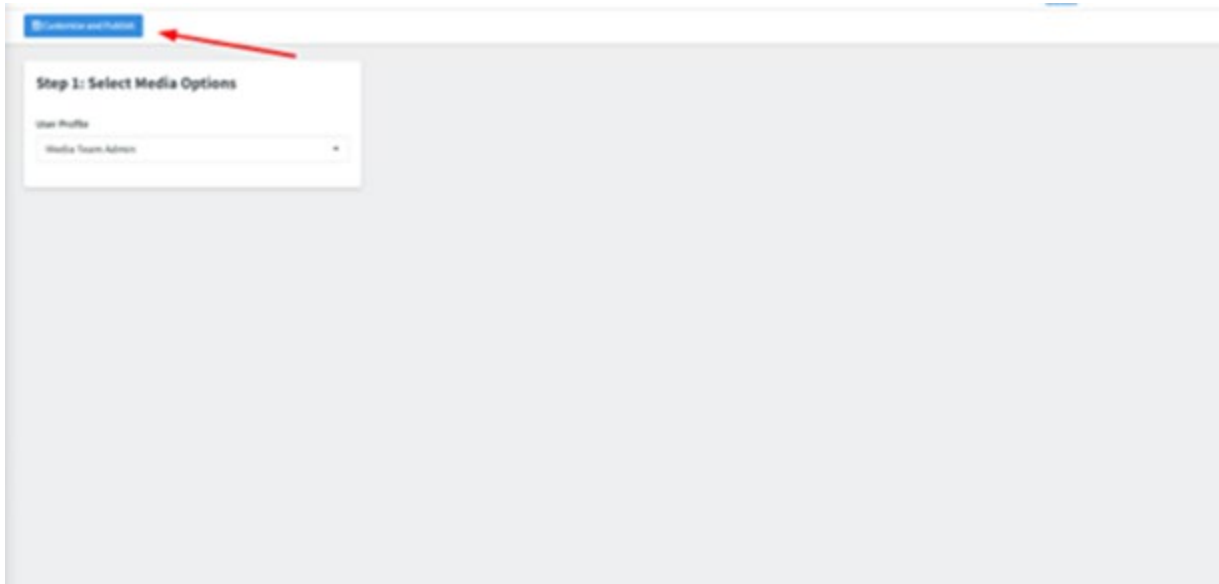






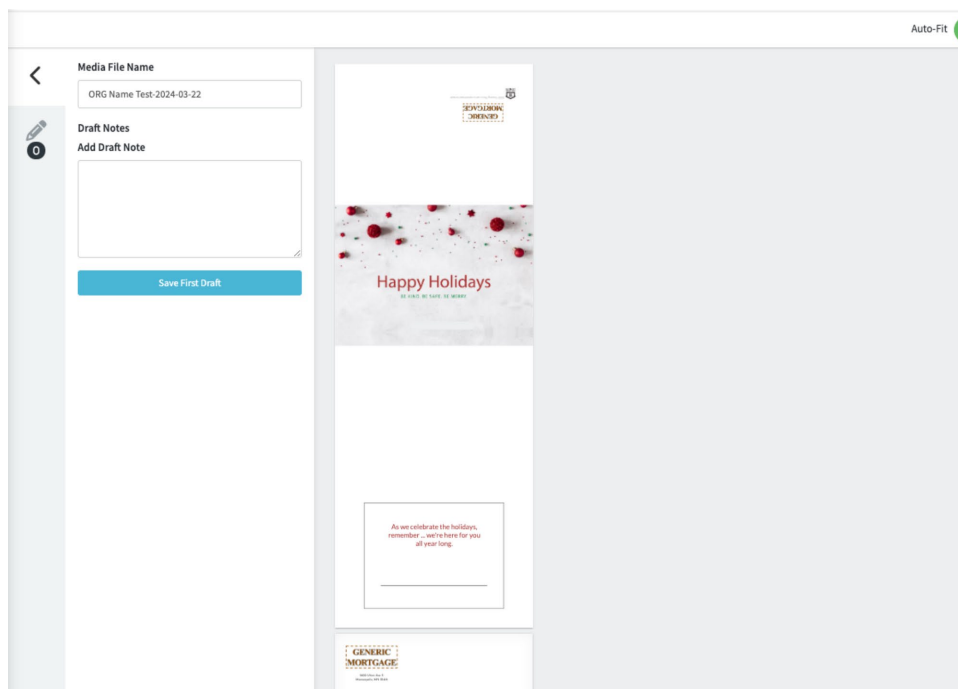
## Step 12

- Confirm the media options are correct then click “Customize and Publish”



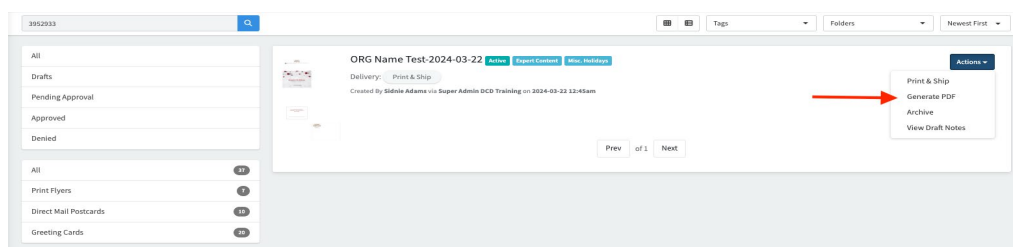
## Step 13

- Review the greeting card entirely, ensuring that all elements and fields are displaying and populating as intended.



## Step 14

- Click “Save First Draft”
- Click “Publish”
- Select “Generate PDF” from the actions dropdown



## Step 15

- Review final PDF in its entirety ensuring that all elements and fields are displaying and populating as intended.



# Reporting Issues with Greeting Cards to Total Expert

When reporting an issue with your greeting card, the level of detail you provide is directly proportional to the efficiency and effectiveness of the troubleshooting process. While the list of details we request might seem extensive, each piece of information plays a vital role in diagnosing and resolving the issue accurately.

Here is what to include in your report:

## 1. Clear Description of the Issue:

- **What is the problem?** Describe what you are seeing versus what you expect to see.
- **Where is it occurring?** Specify the part of the template (e.g., name, title, contact information) where the issue appears. Is it occurring in the platform preview or in the generated PDF?

## 2. Visual Evidence:

- **Screenshots:** Attach clear screenshots showing the issue. If possible, highlight the areas of concern.
- **Comparison Images:** If applicable, provide a side-by-side comparison with a correct version of the template.

## 3. Steps to Reproduce:

- A screen recording detailing the exact steps taken to observe the issue. This helps developers recreate the problem on their end.

## 4. Impact Assessment:

- **Scope:** Is the issue affecting a single user or multiple users?
- **Functionality:** Does the problem impact functionality (e.g., dynamic information) or is it purely aesthetic?