Customer QA Documentation

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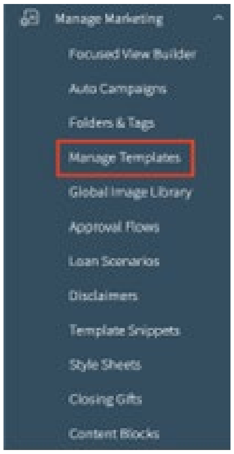
TOTAL EXPERT

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.

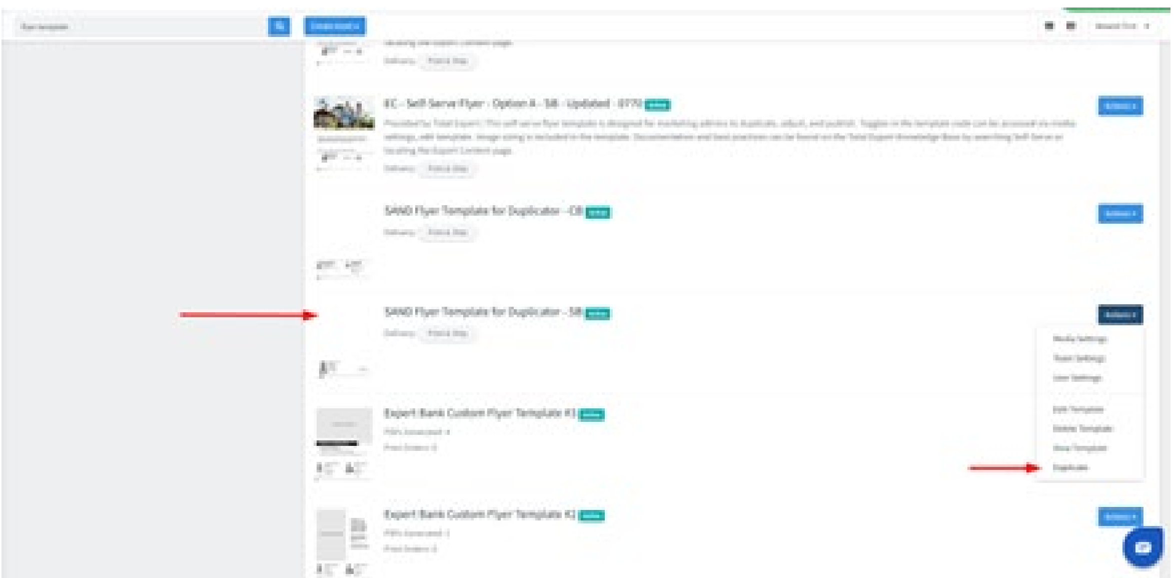
Step 1

- 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.

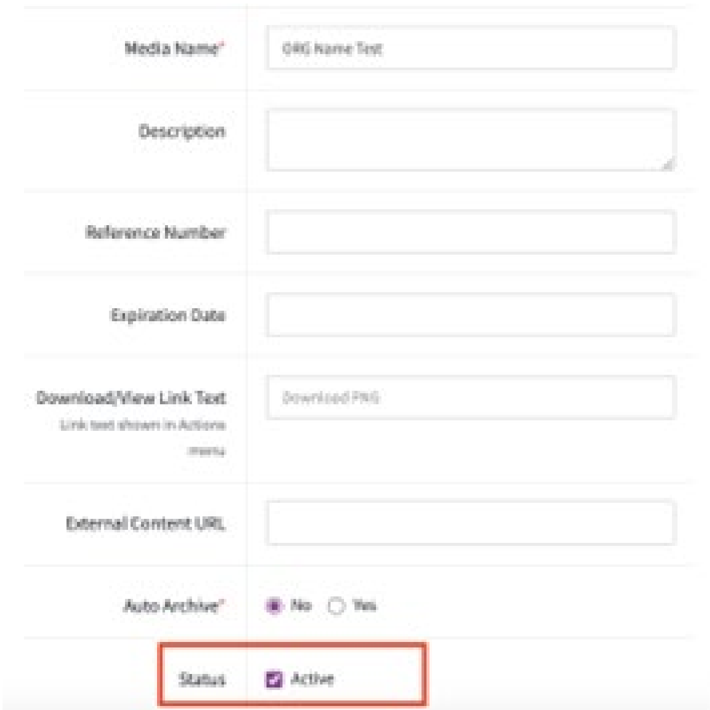


Step 3

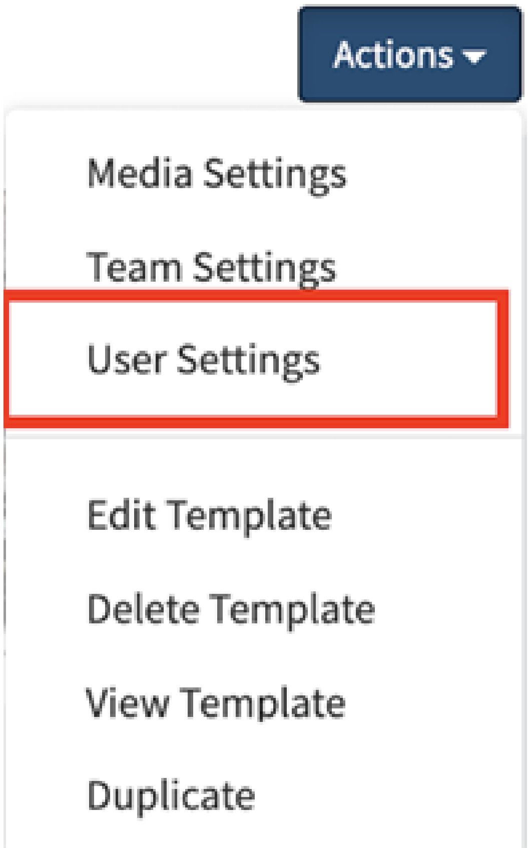
- Name The Media
- Check duplicate template setting box
- Click duplicate

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.

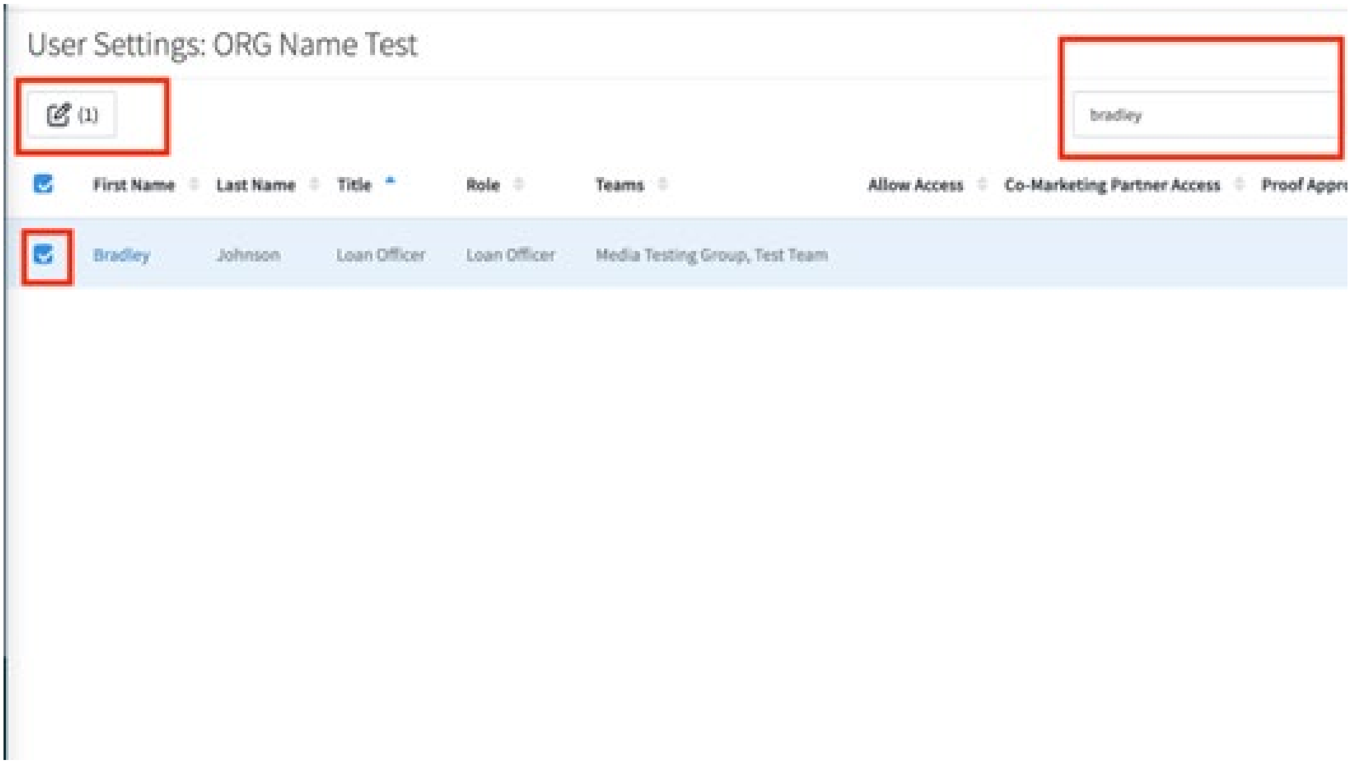


- Allow user access to your test user of choice by searching for the test template via Manage Marketing > Manage Templates
- Click > Actions > User Settings



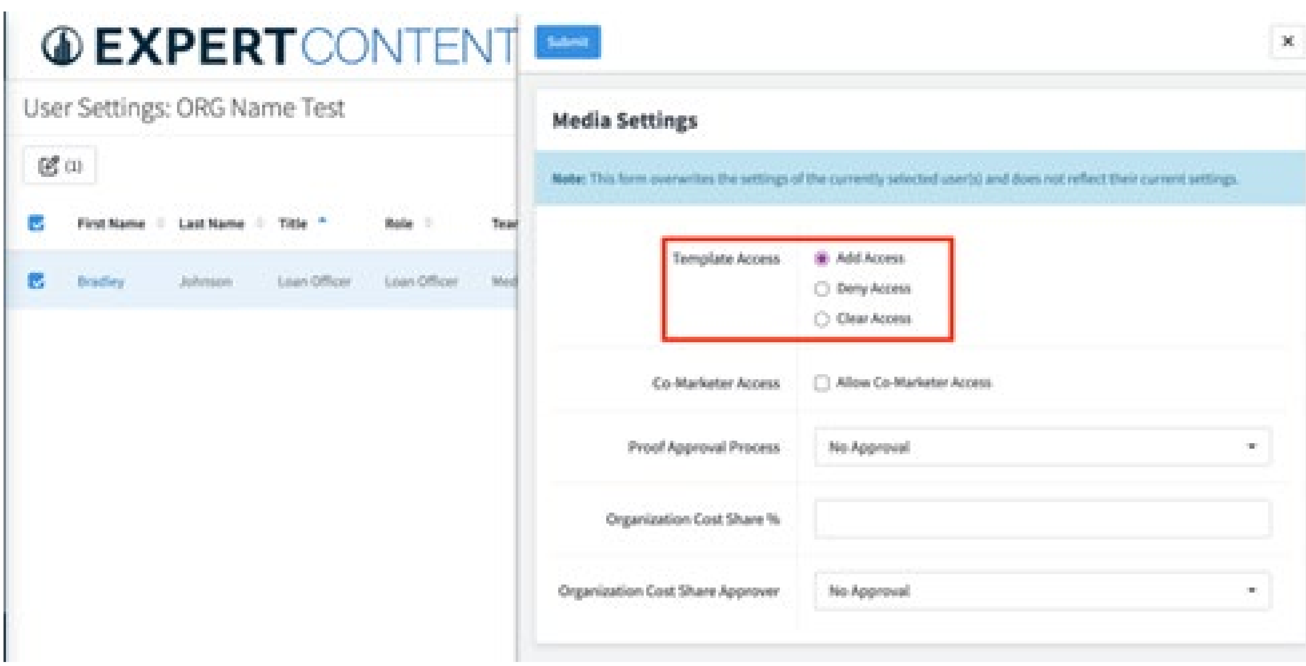
Step 5

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



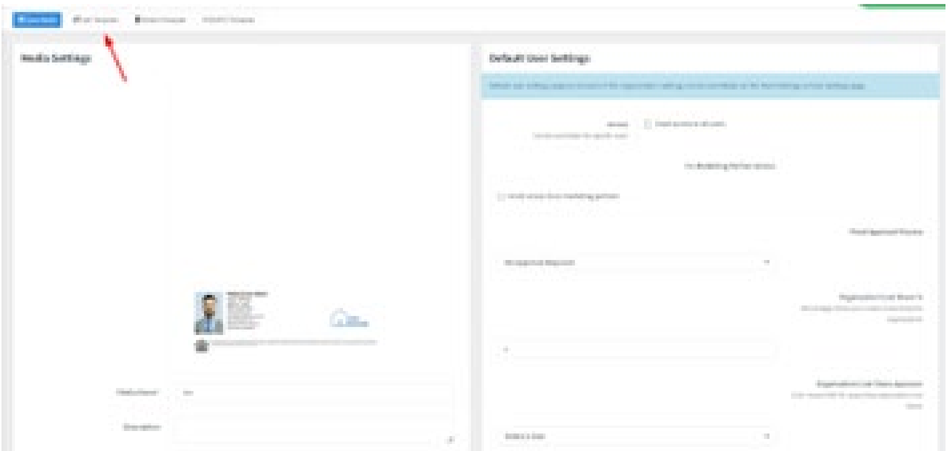
Step 6

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



Step 7

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



Step 8

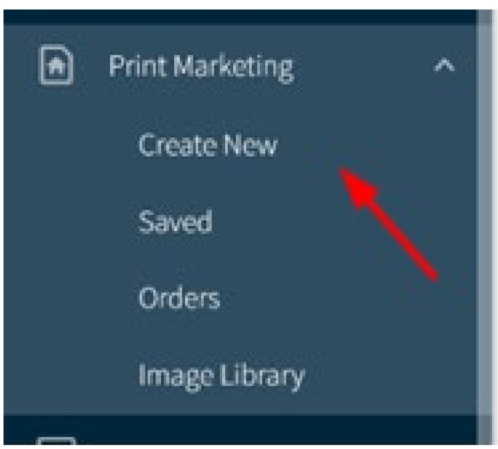
- Once in the template editing page make sure that all requested toggles and editable fields are present and functioning as intended.
- Toggle functionality page can be found here: [Toggle Checklist]
- A test image can also be added in this step to ensure that everything populates into the template as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

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.

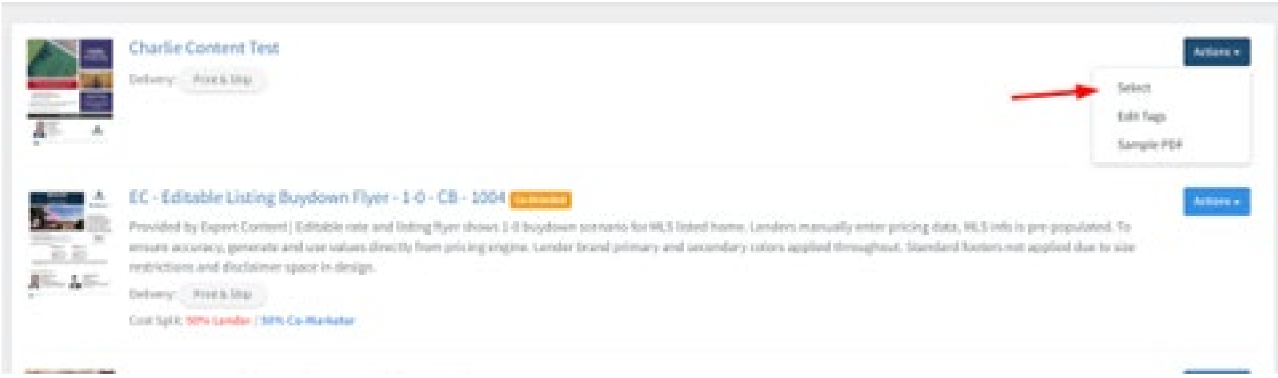
Step 10

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



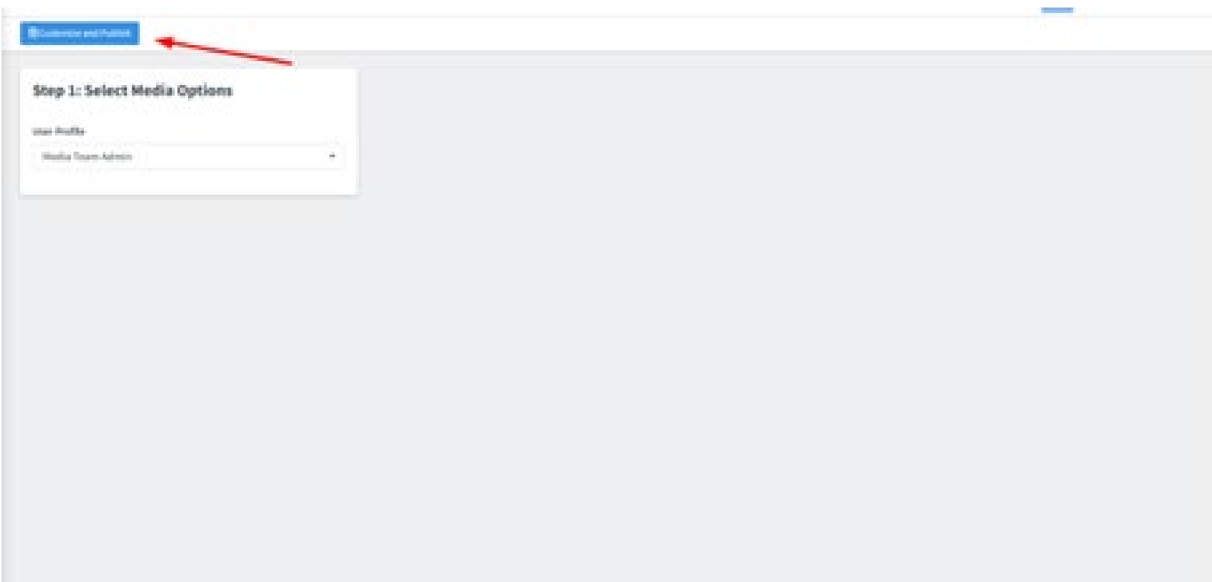
Step 11

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



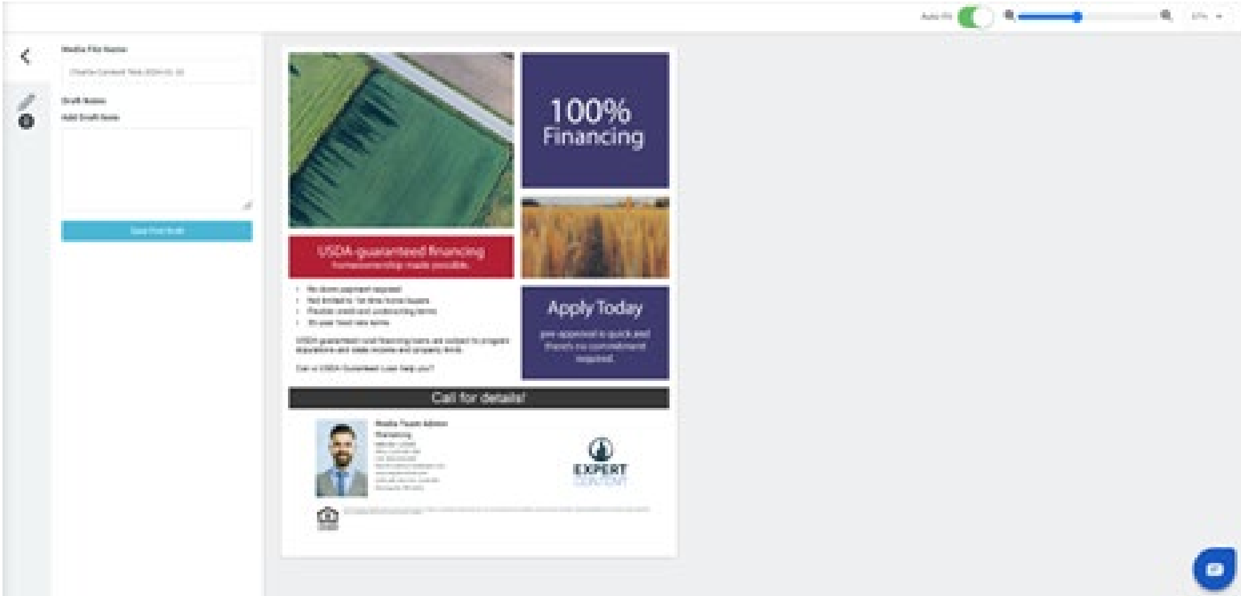
Step 12

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



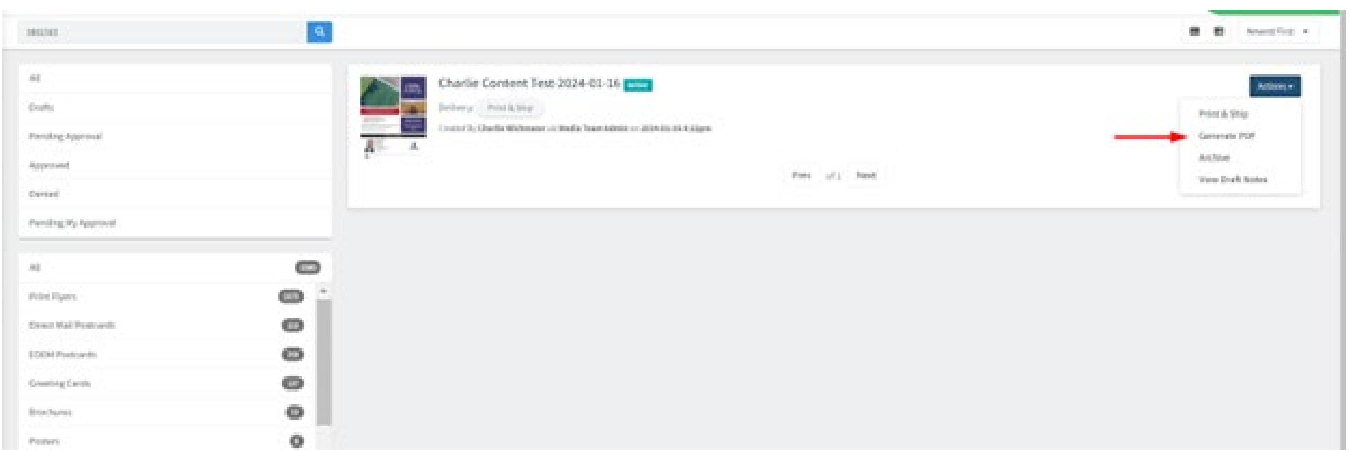
Step 13

- 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.

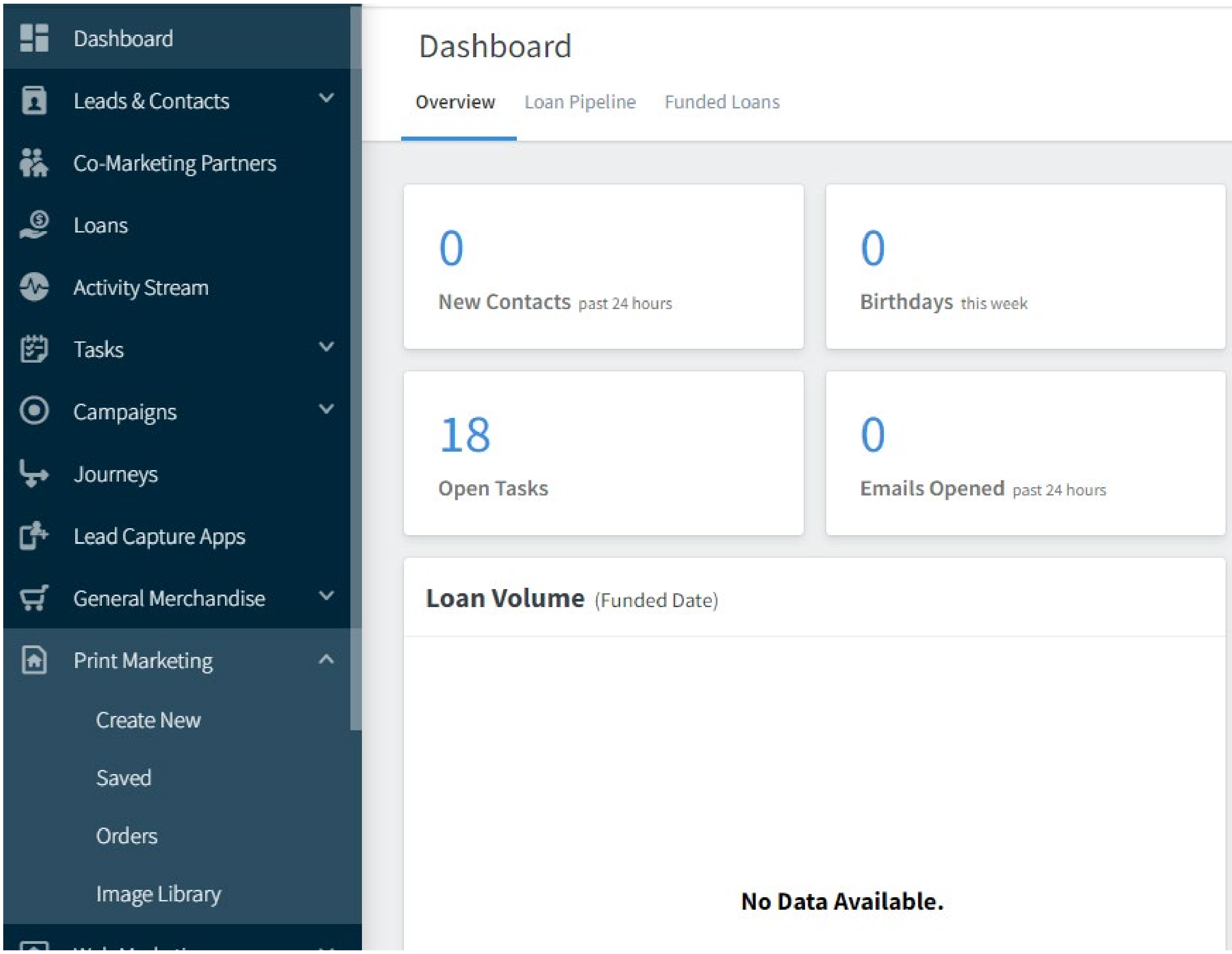
Here is what to include in your report:

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

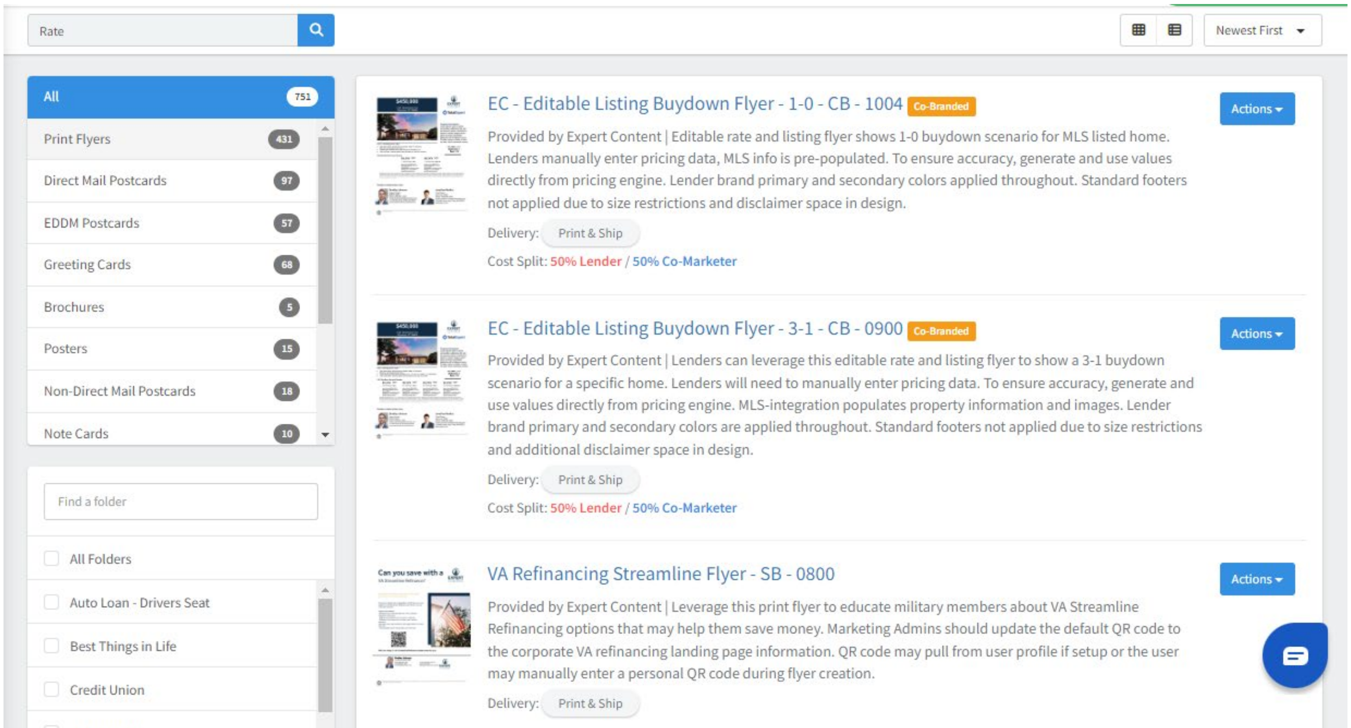
Step 1

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

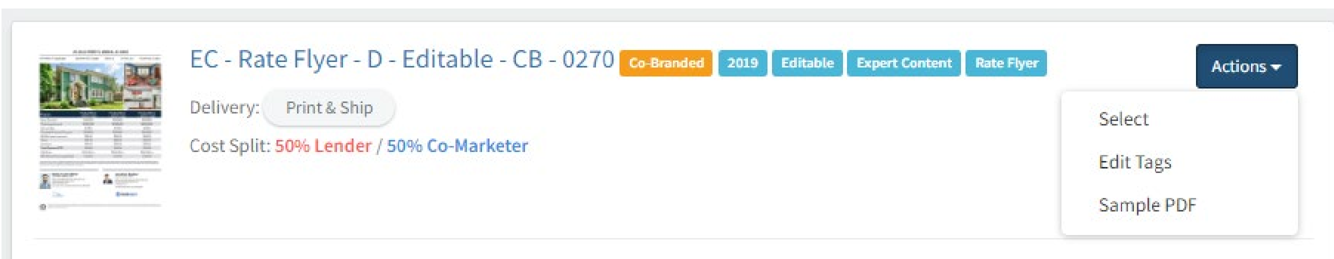


Step 2

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

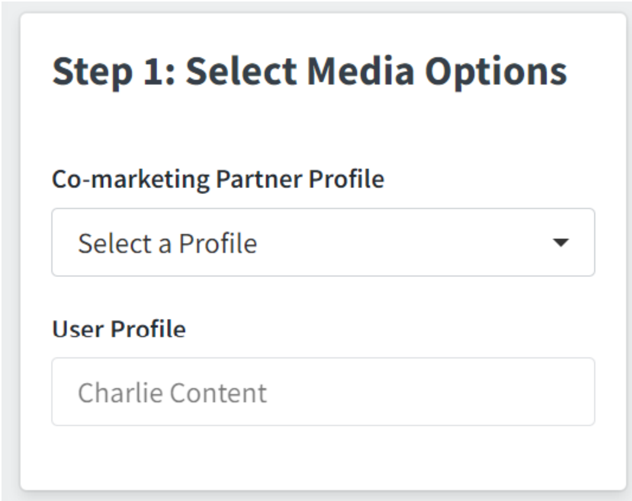


- Click Actions > Select



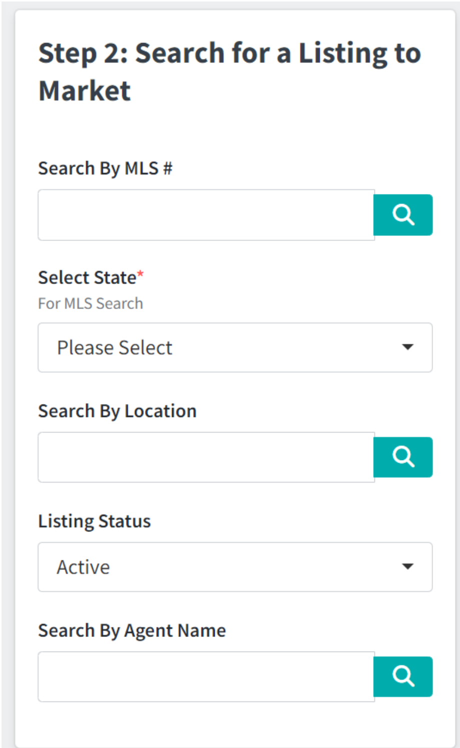
Step 3

- 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.

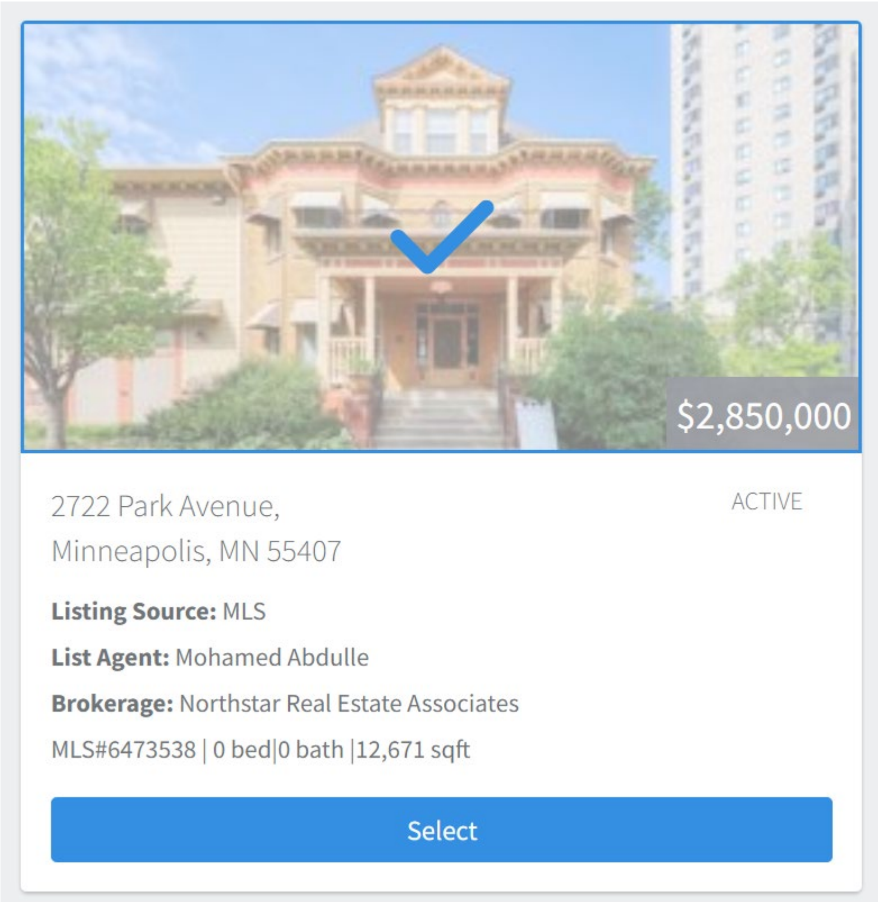


Step 4

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

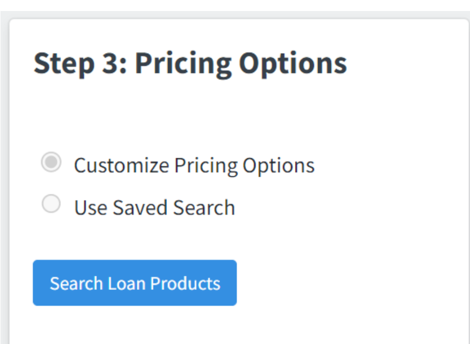


- Click select on the property listing you would like to make the flyer for.



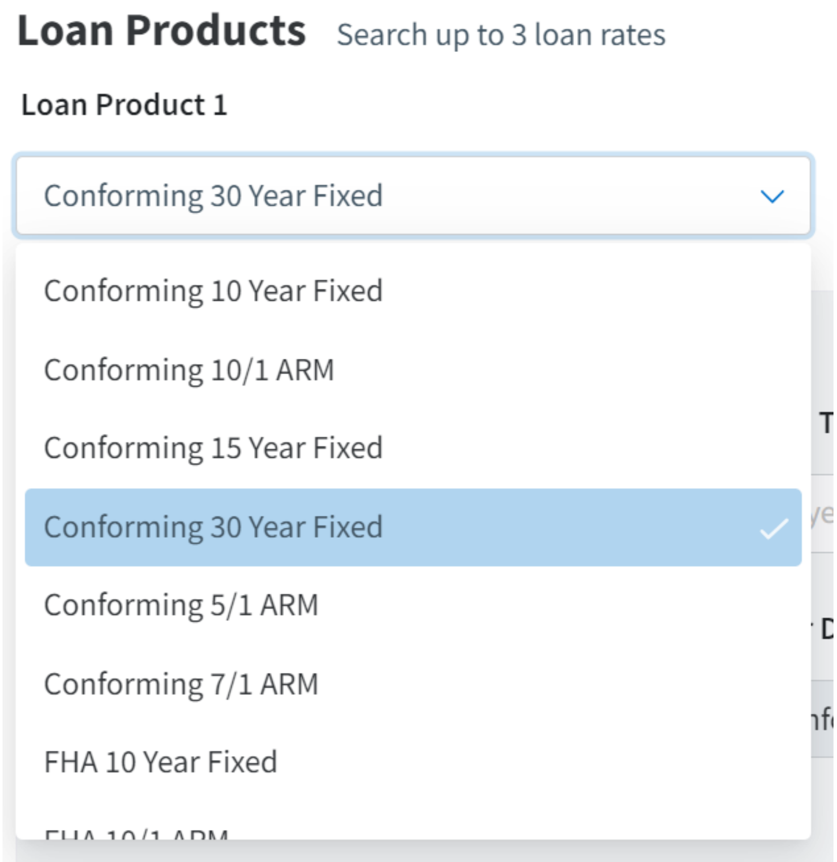
Step 5 (For Optimal Blue)

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



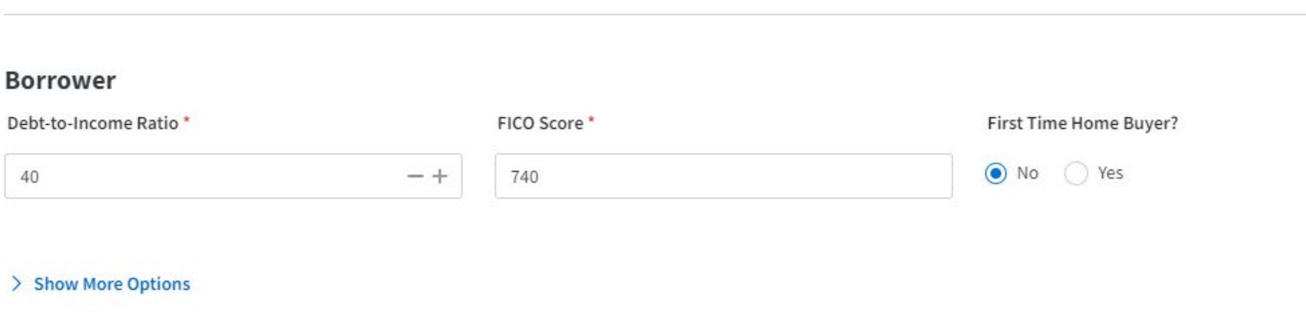
Step 6 (For Optimal Blue)

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

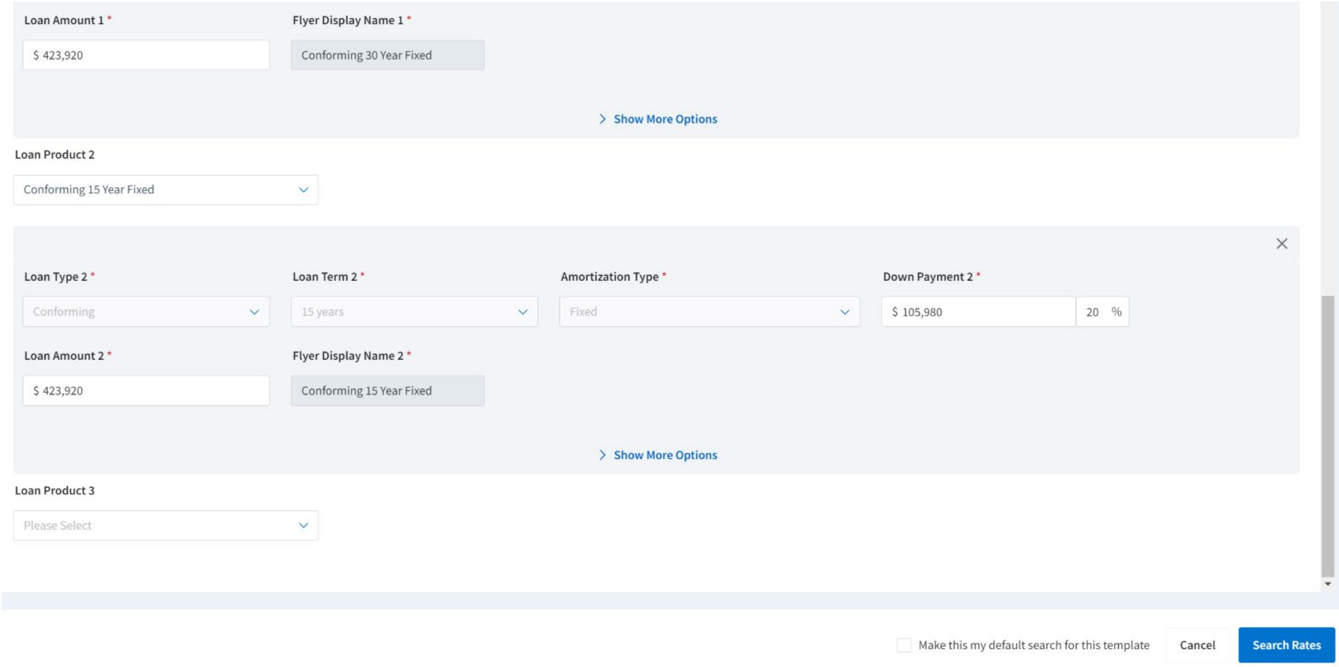


Step 7 (For Optimal Blue)

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



- Click Search Rates to pull the available results



Step 8 (For Optimal Blue)

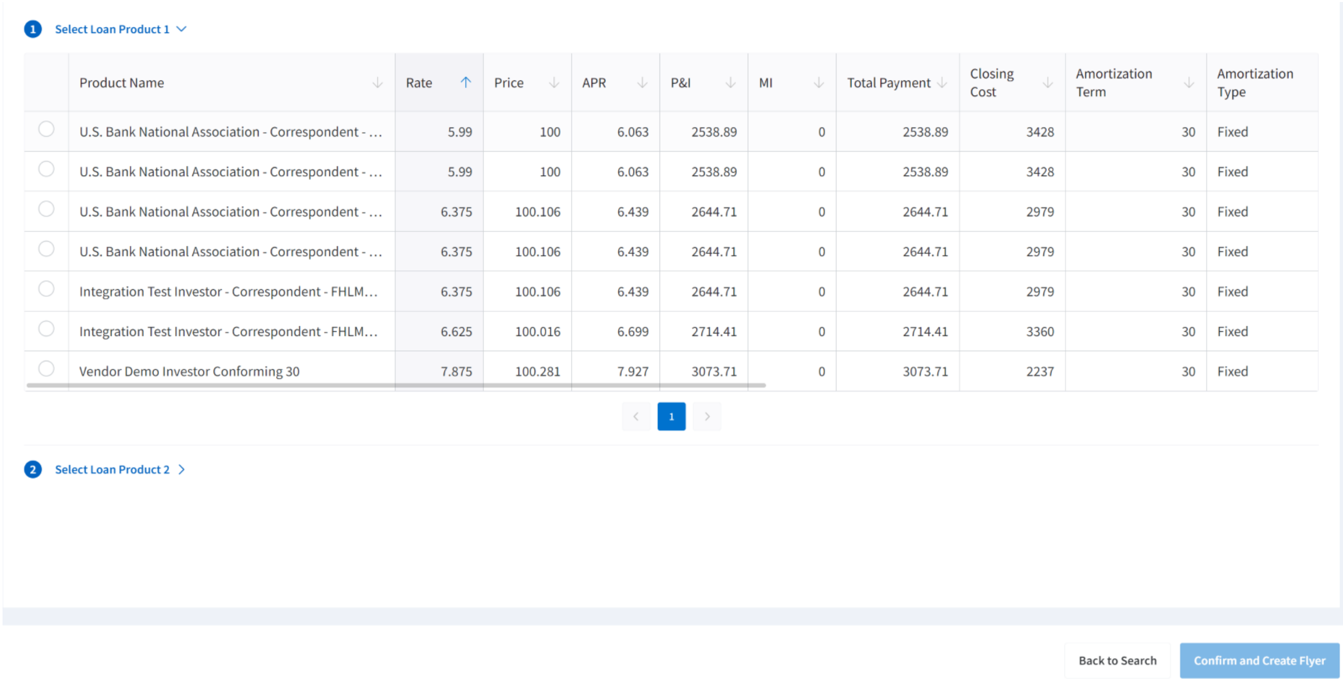
- Select Product for each Loan Product

1 Select Loan Product 1

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

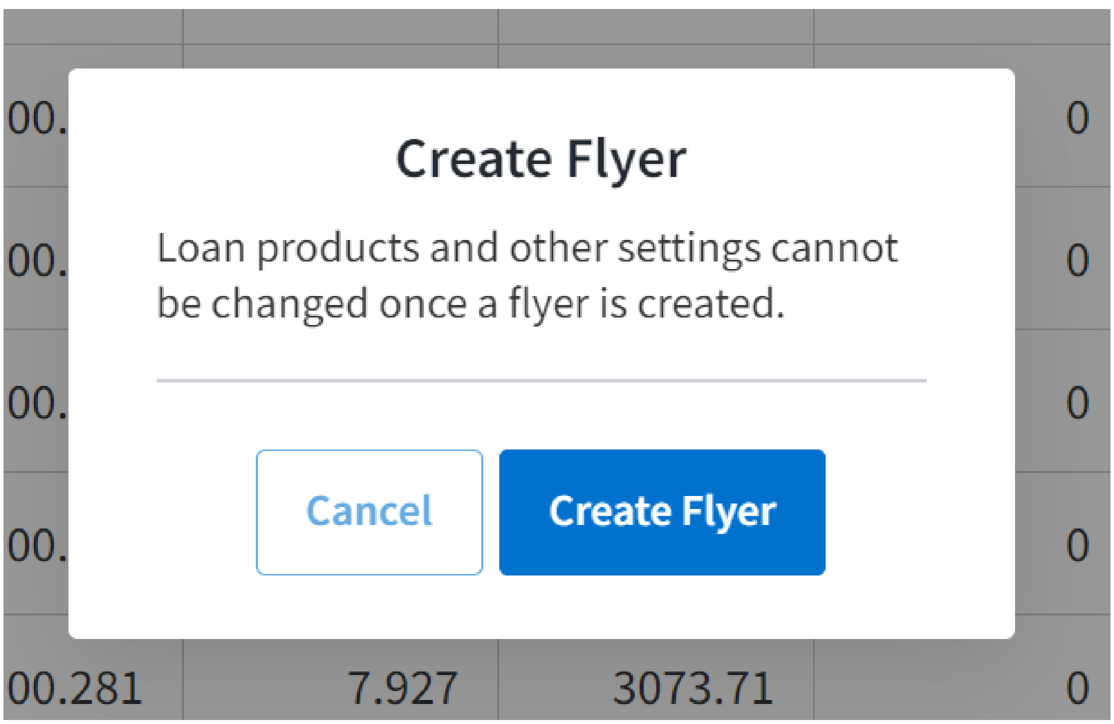
Step 9 (For Optimal Blue)

- Click Confirm and Create Flyer



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

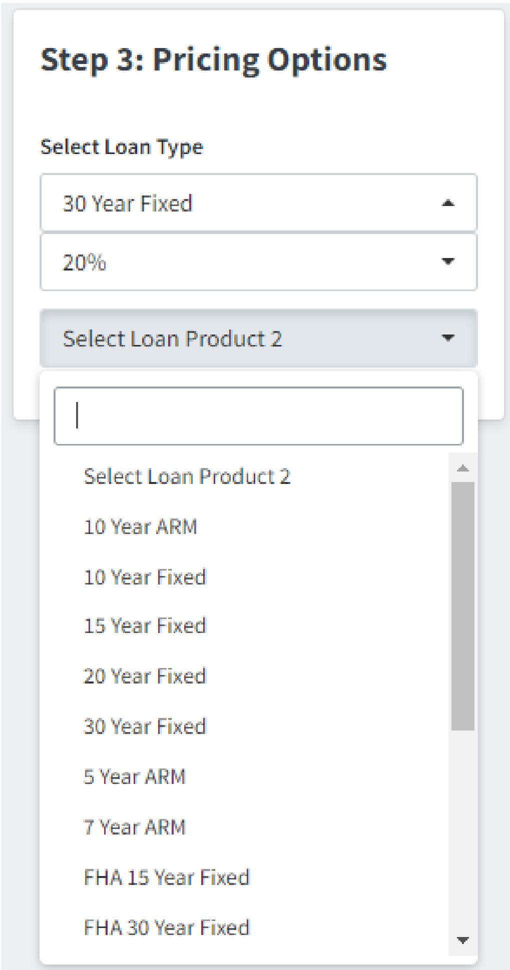
- Click Create Flyer in popup window



TOTAL EXPERT

Step 5 (For Polly)

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



Step 6 (All Non-OB Integrations)

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

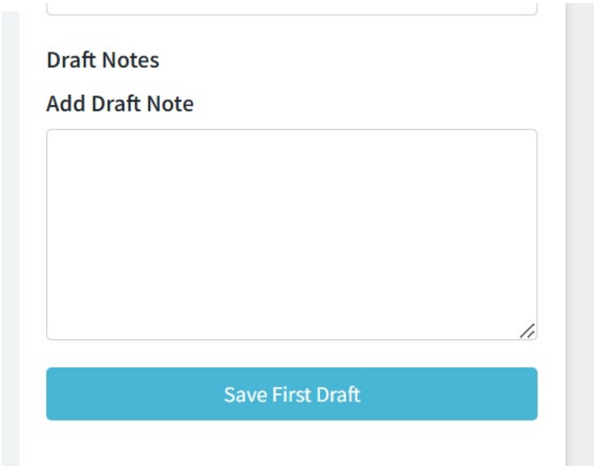
Step 10

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

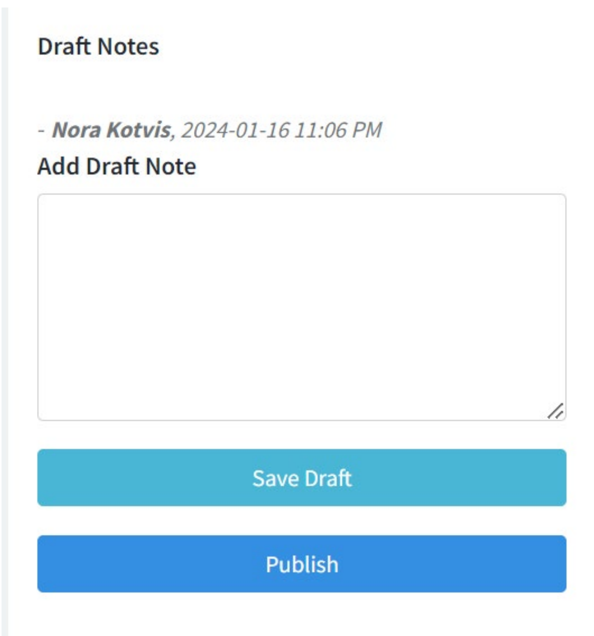
- Update any editable field you would like to make changes to.

Step 11

- Click Save First Draft

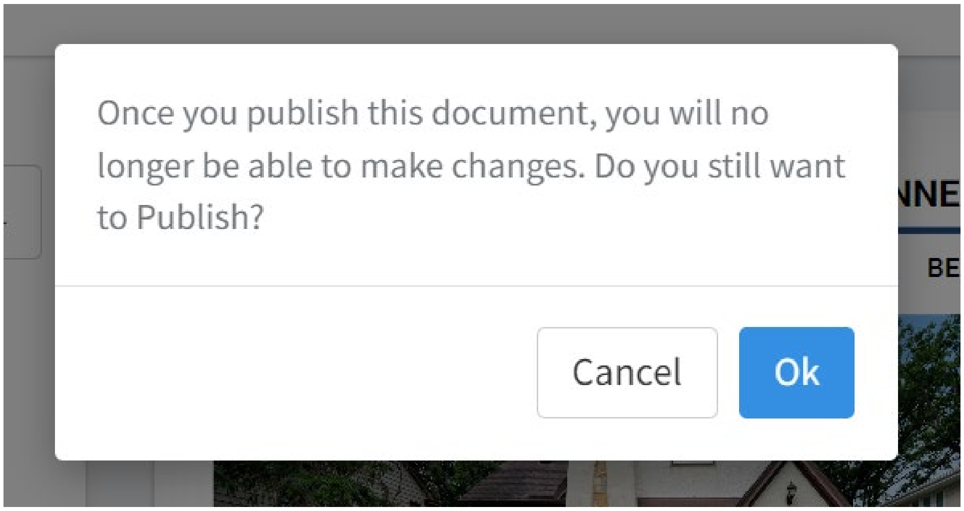


- Then click Publish.



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.

Here is what to include in your report:

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    - 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:**

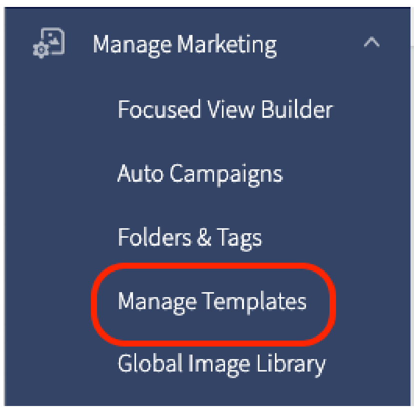
- **Scope**: Is the issue affecting a single user or multiple users?
- **Functionality**: Does the problem impact functionality (e.g., dynamic information) or is it purely aesthetic?

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.

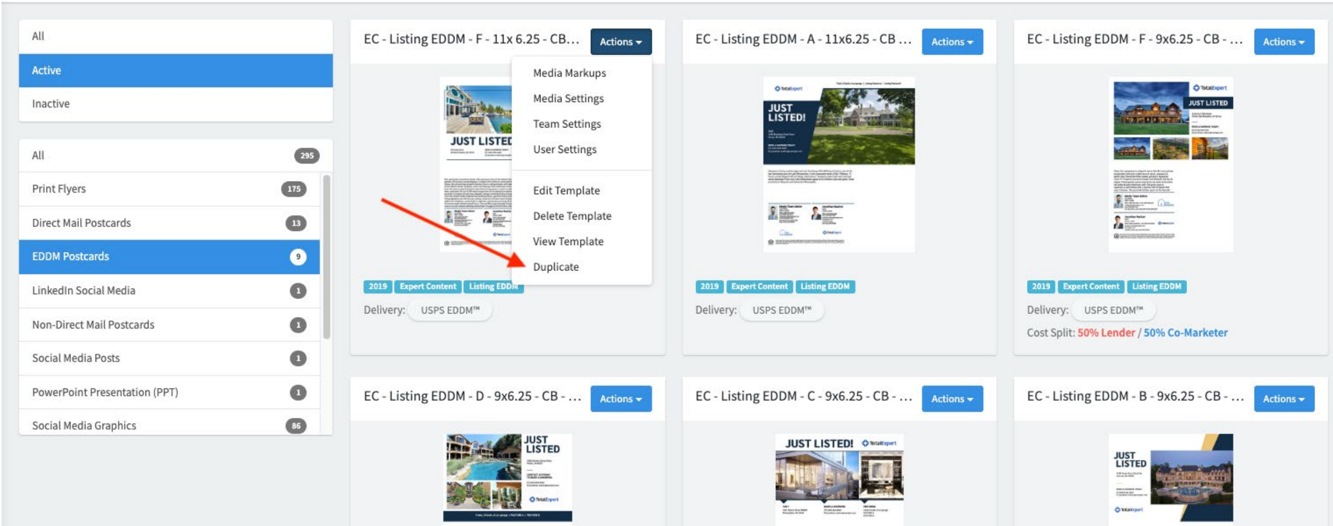
Step 1

- 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**



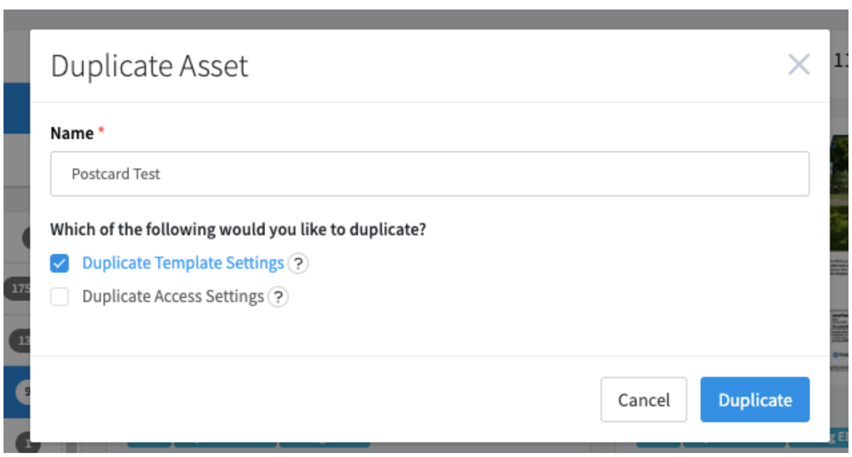
Step 2

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



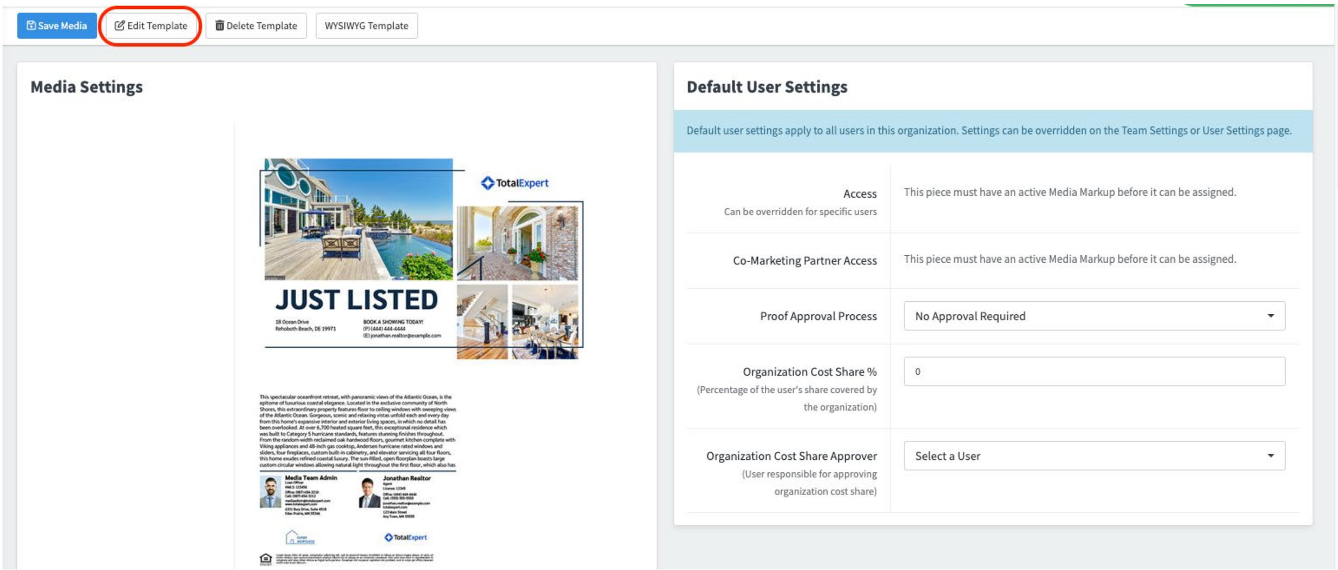
Step 3

- 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.



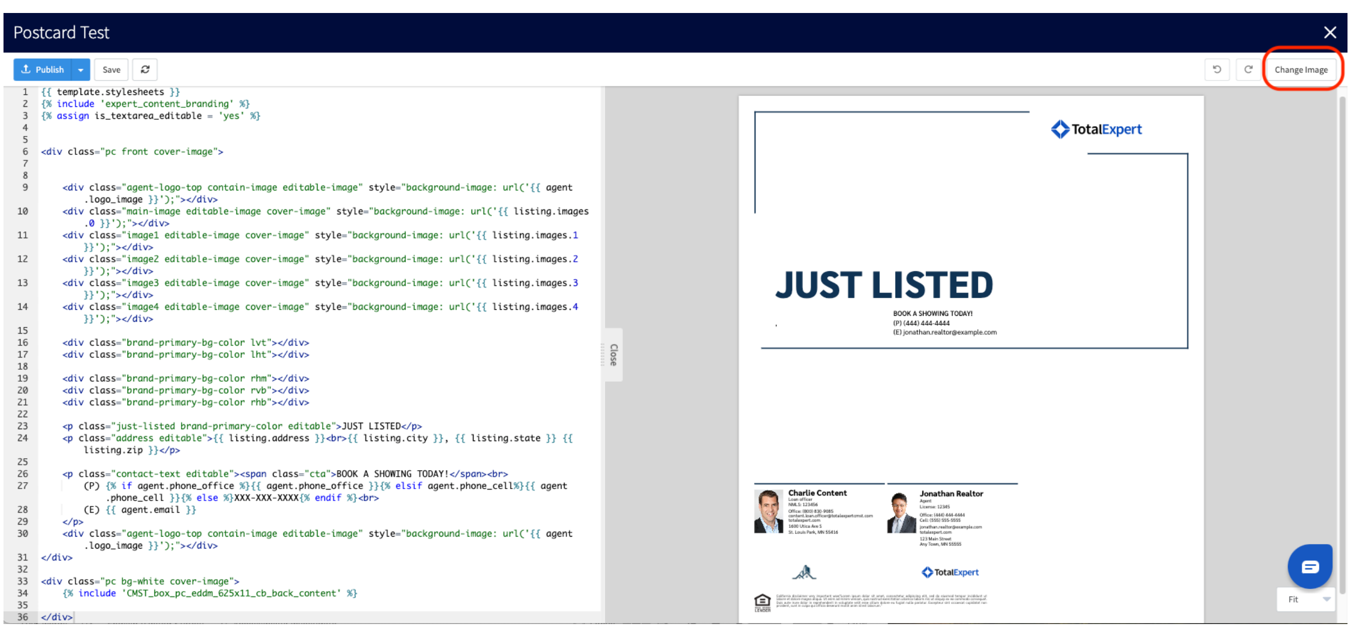
Step 5

- 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

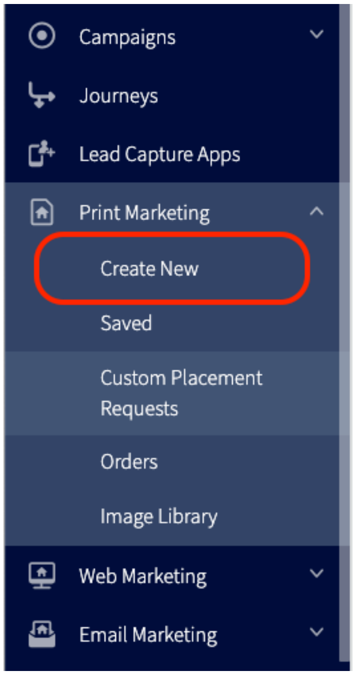
```
{{ template.stylesheets }}
{% include 'expert_content_branding' %}
{% assign is_textarea_editable = 'yes' %}


<div class="pc front cover-image">


    <div class="agent-logo-top contain-image editable-image" style="background-image: url('{{ agent
        .logo_image }}');"></div>
    <div class="main-image editable-image cover-image" style="background-image: url('{{ listing.images
        .0 }}');"></div>
    <div class="image1 editable-image cover-image" style="background-image: url('{{ listing.images.1
        }}');"></div>
    <div class="image2 editable-image cover-image" style="background-image: url('{{ listing.images.2
        }}');"></div>
    <div class="image3 editable-image cover-image" style="background-image: url('{{ listing.images.3
        }}');"></div>
    <div class="image4 editable-image cover-image" style="background-image: url('{{ listing.images.4
        }}');"></div>

    <div class="brand-primary-bg-color lvt"></div>
    <div class="brand-primary-bg-color lht"></div>

    <div class="brand-primary-bg-color rhm"></div>
    <div class="brand-primary-bg-color rvb"></div>
    <div class="brand-primary-bg-color rhb"></div>

    <p class="just-listed brand-primary-color editable">JUST LISTED</p>
    <p class="address editable">{{ listing.address }}<br>{{ listing.city }}, {{ listing.state }} {{
        listing.zip }}</p>

    <p class="contact-text editable"><span class="cta">BOOK A SHOWING TODAY!</span><br>
        (P) {% if agent.phone_office %}{{ agent.phone_office }}{% elsif agent.phone_cell%}{{ agent
            .phone_cell }}{% else %}XXX-XXX-XXXX{% endif %}<br>
        (E) {{ agent.email }}
    </p>
    <div class="agent-logo-top contain-image editable-image" style="background-image: url('{{ agent
        .logo_image }}');"></div>
</div>

<div class="pc bg-white cover-image">
    {% include 'CMST_box_pc_eddm_625x11_cb_back_content' %}
</div>
```



- 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).

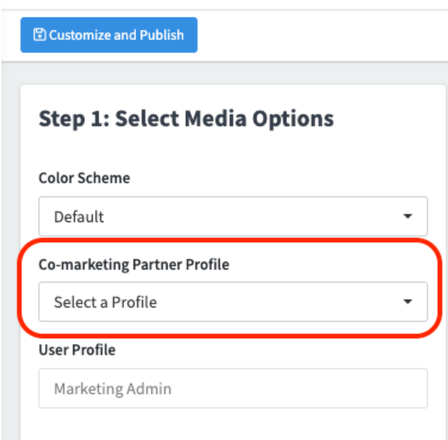
- The Postcard is shown in the correct folder (if applicable).

Troubleshooting notes:

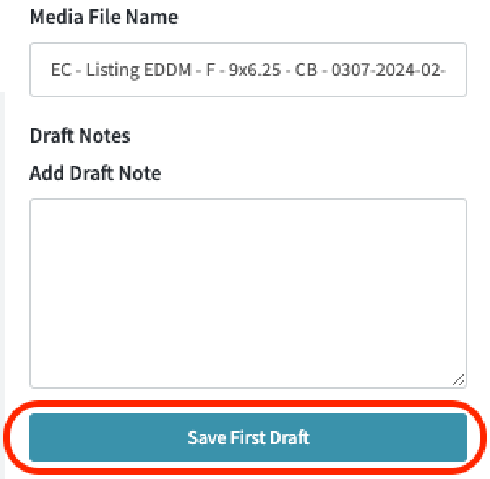
- If the Postcard is not appearing in the library, go to **Manage Marketing > Manage Templates**
- Select **Actions > Team Settings**. Ensure that the asset is assigned to the Media Testing Group. Also select **Actions > User Settings** and ensure that user settings are not overriding the team setting.
- 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**.

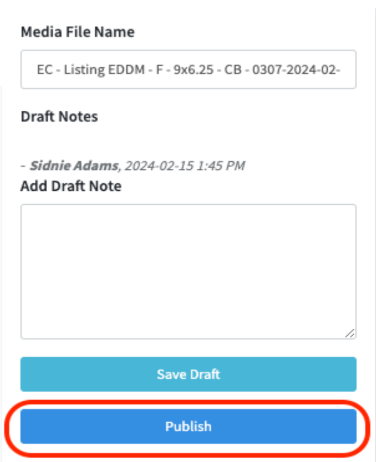


- Once you have reviewed the Postcard, click **Save First Draft.**



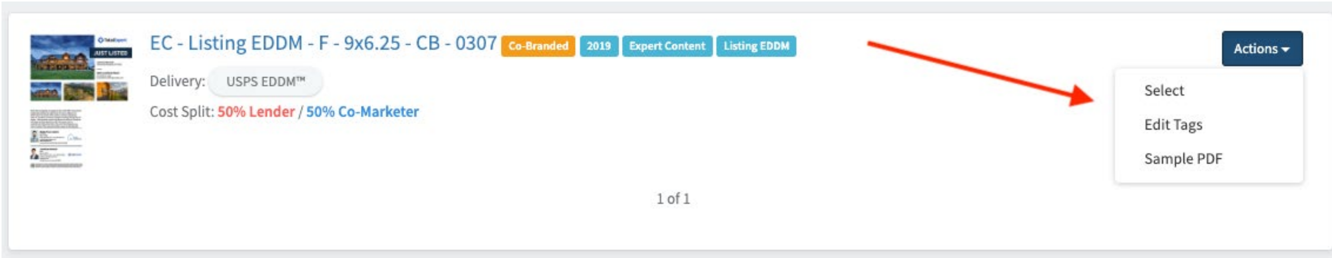
Step 8

- 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.



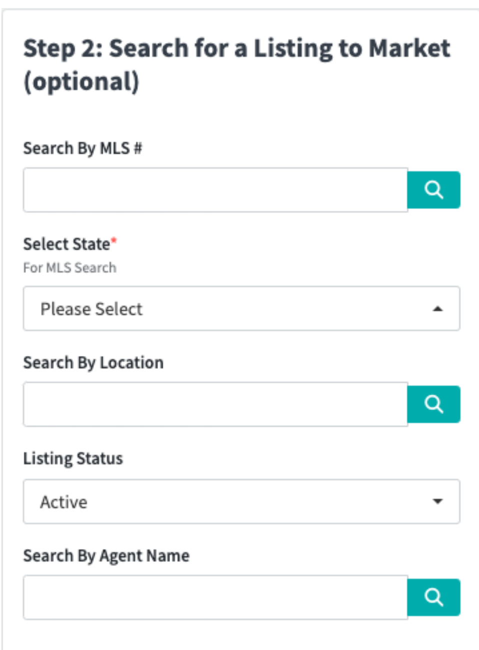
Step 9

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

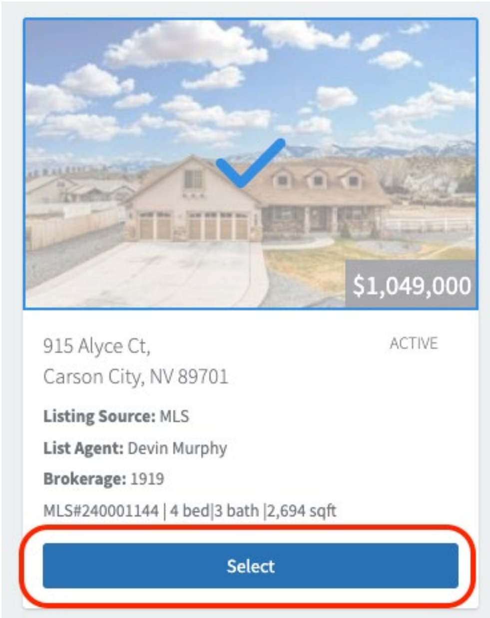


To test:

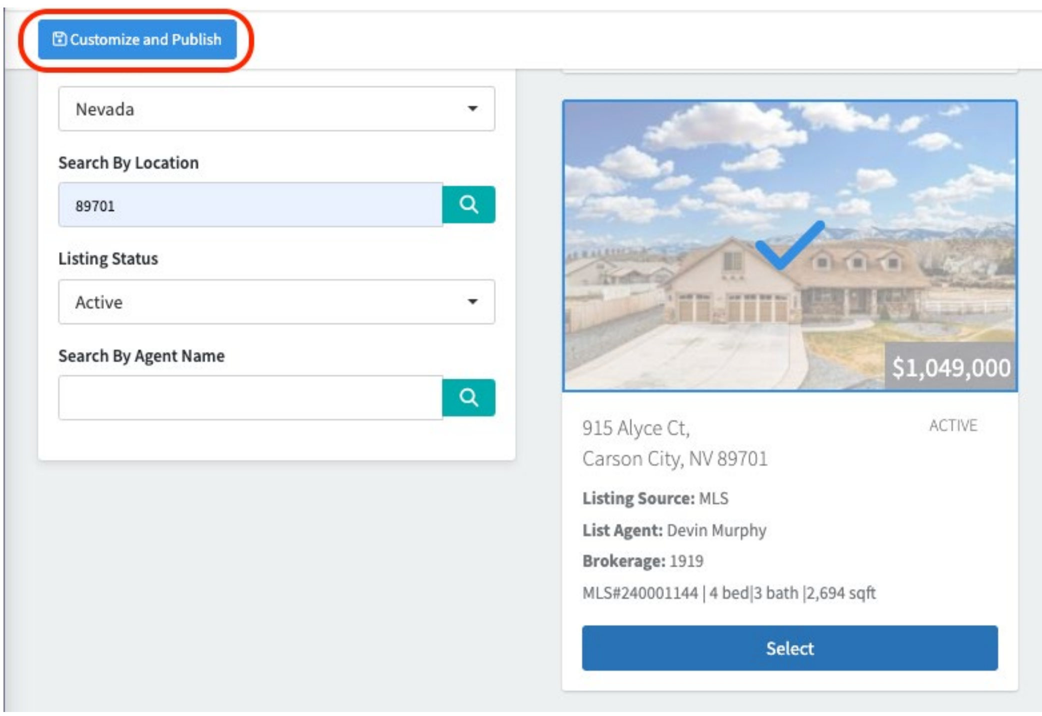
- Search by MLS#
- Select State
- Search by Location (zip code)
- Select Listing Status
- Search by Agent Name



- Select listing on the right side.

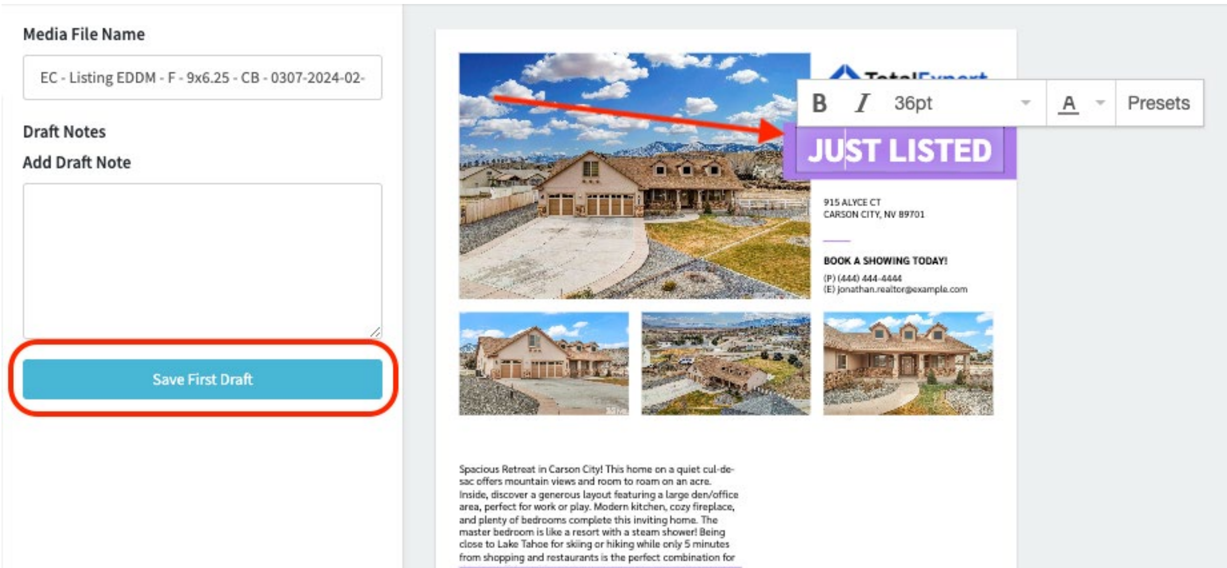


- Click **Customize and Publish** in the top left corner.



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**



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.

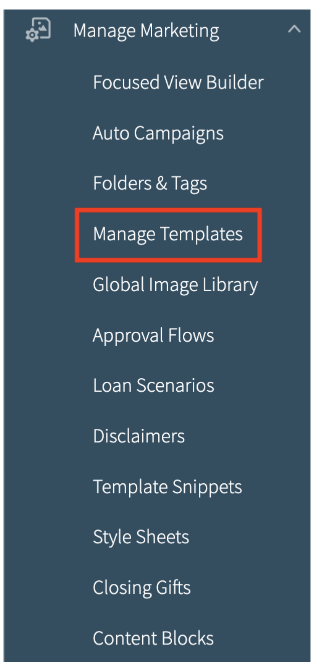
3. **Steps to Reproduce:**
    - A screen recording detailing the exact steps taken to observe the issue. This helps developers recreate the problem on their end.
4. **Impact Assessment:**
    - **Scope**: Is the issue affecting a single user or multiple users?
    - **Functionality**: Does the problem 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.

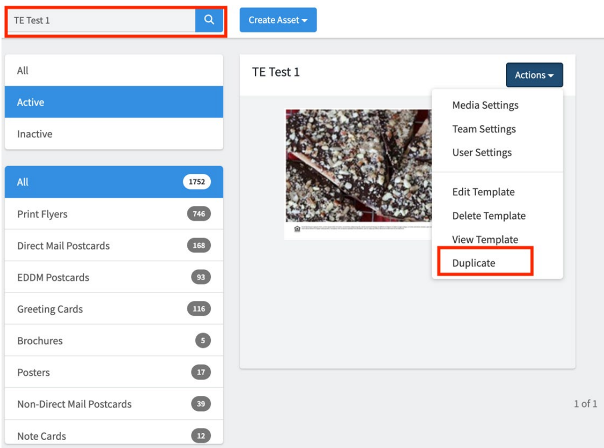
Step 1

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



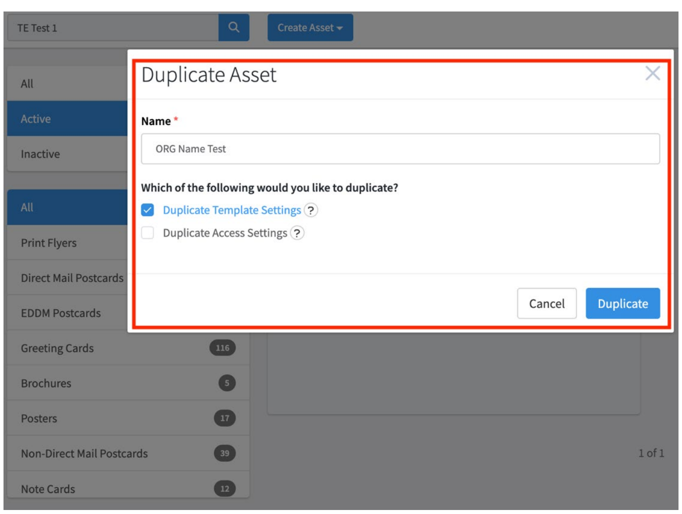
Step 2

- 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.



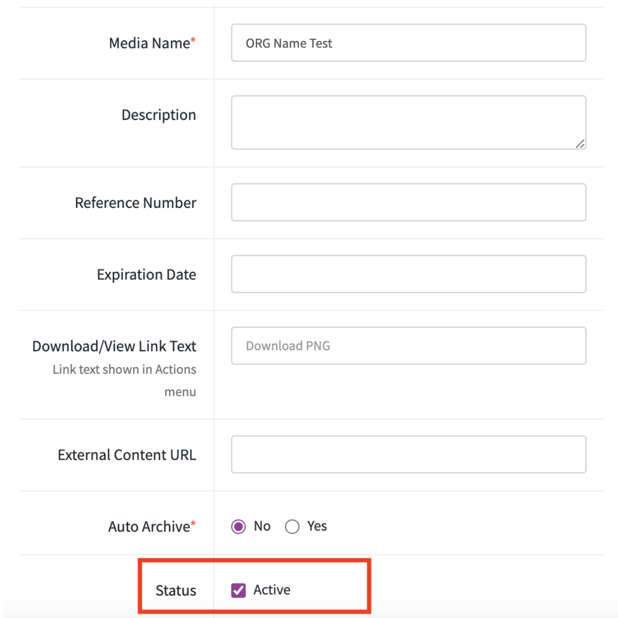
Step 3

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



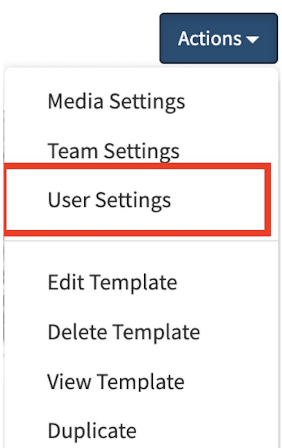
Step 4

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



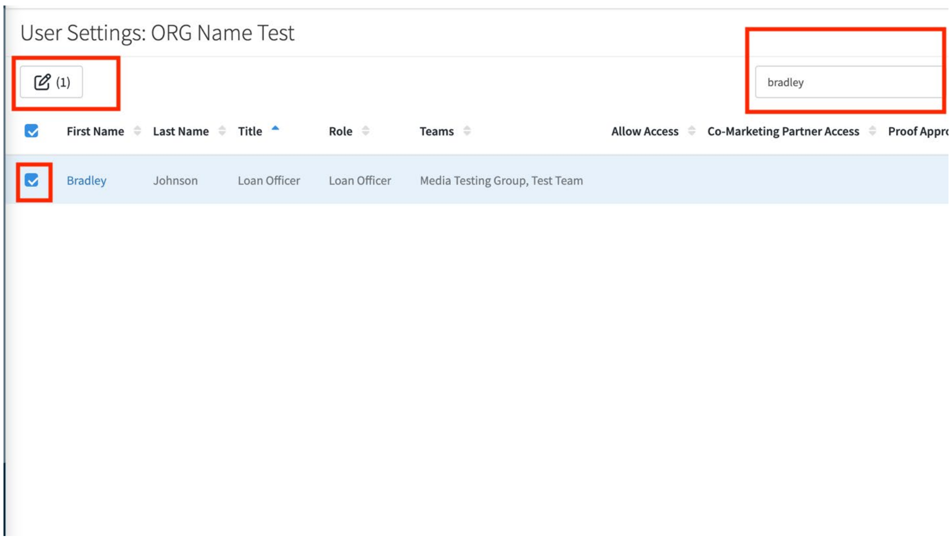
Step 5

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



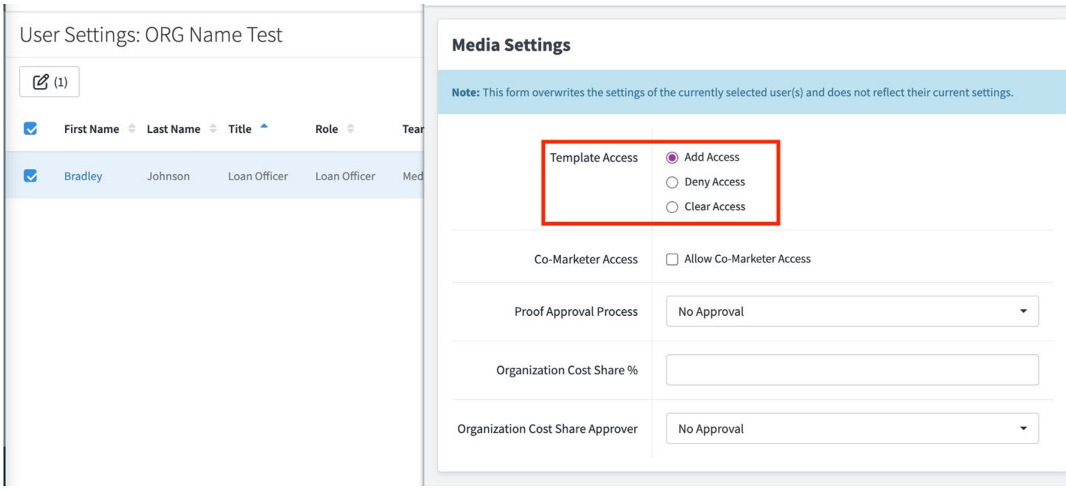
Step 6

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



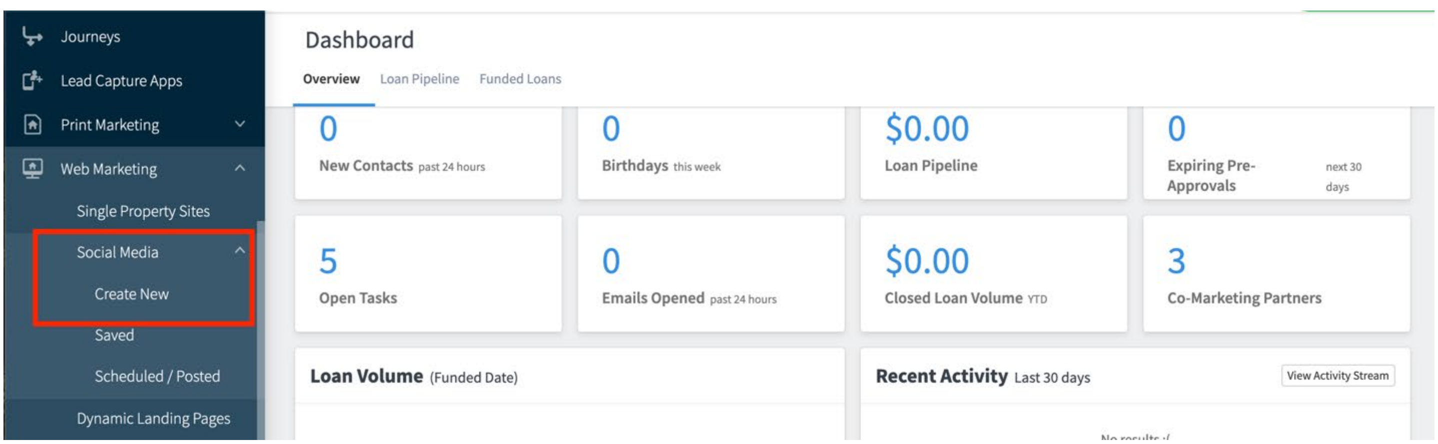
Step 7

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



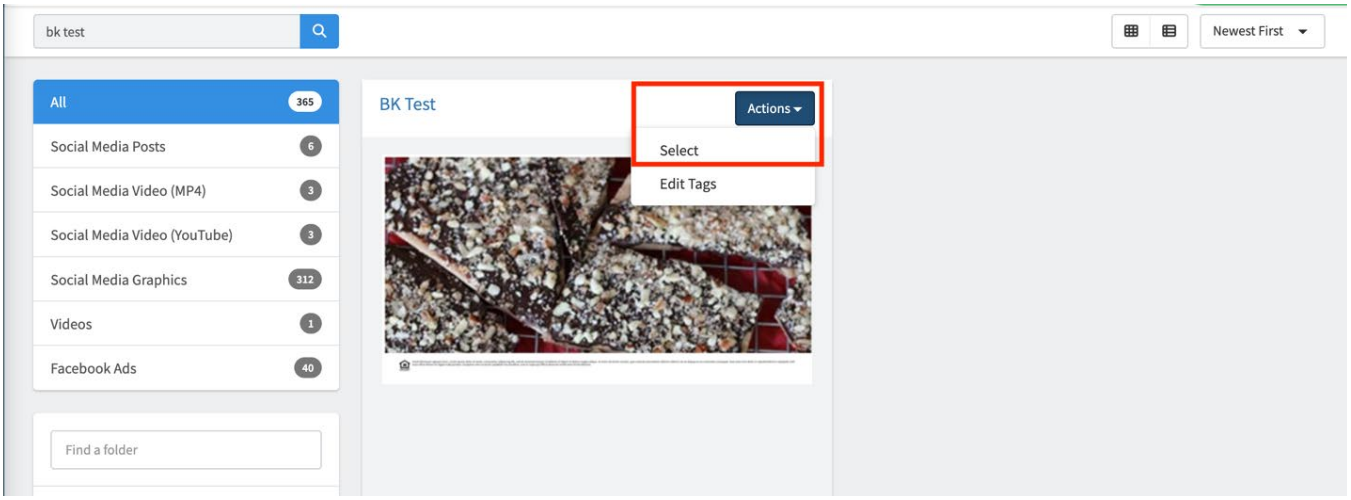
Step 8

- 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



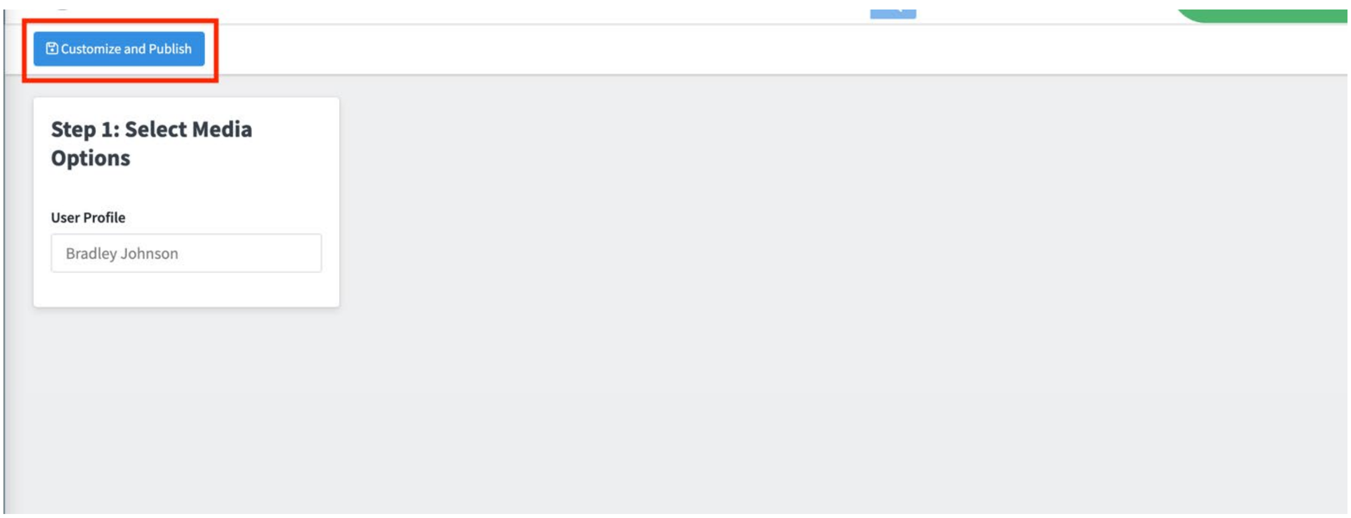
Step 9

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



Step 10

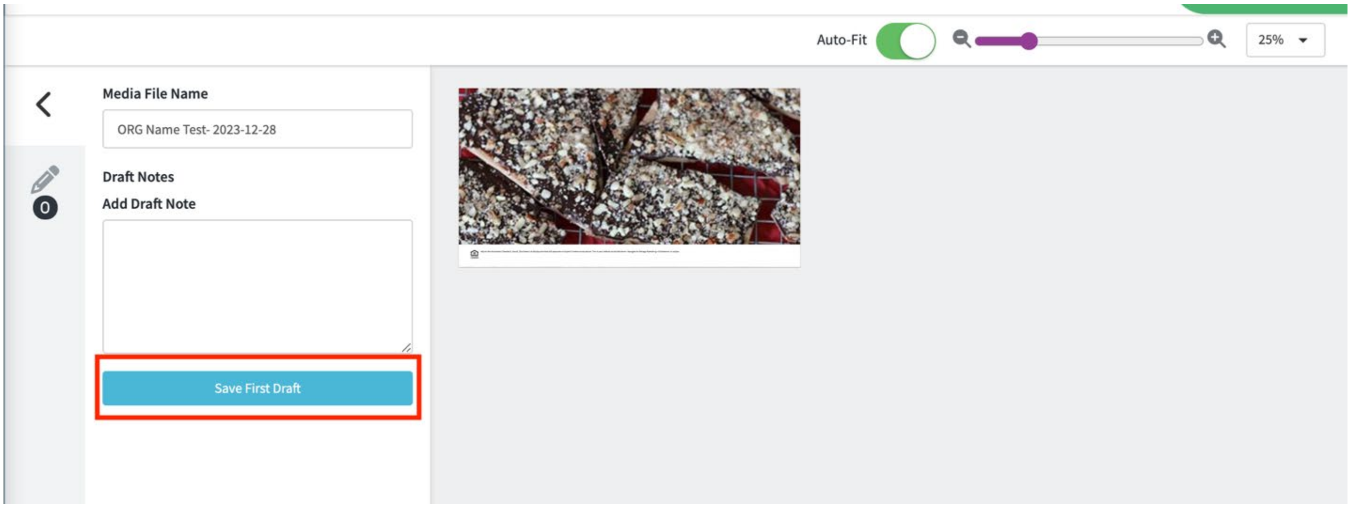
- Click > Customize and Publish in the top left corner.



Step 11

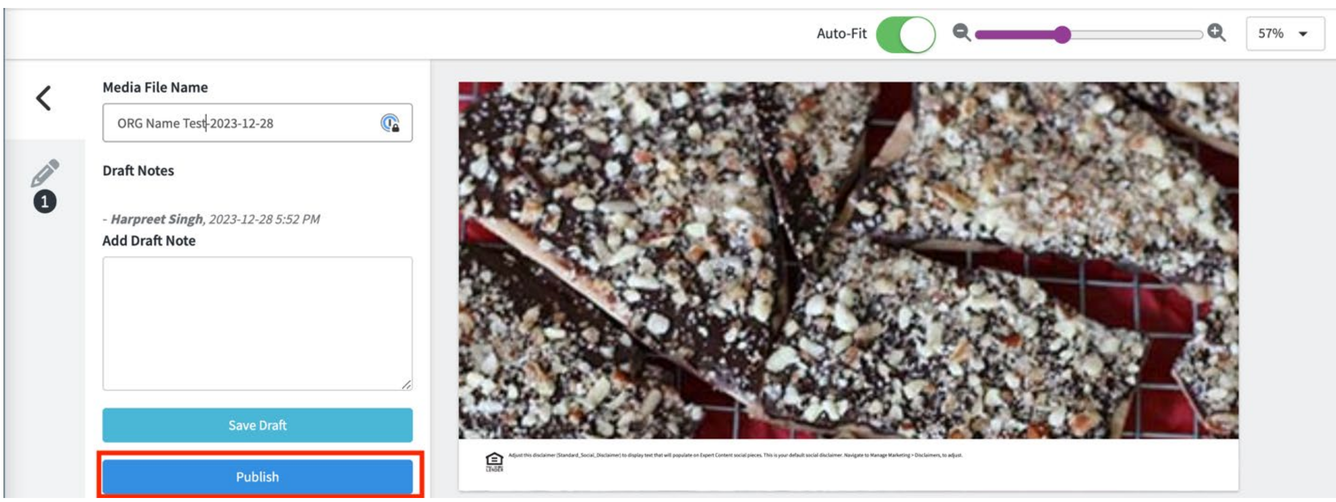
- Verify the Social Template is functioning, including disclaimers and any dynamic fields from the designs provided.

- Once tested, click > Save First Draft



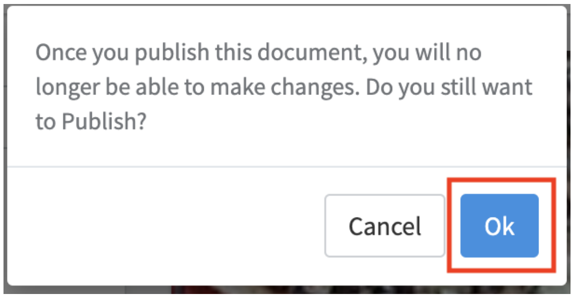
Step 12

- Select Publish



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.

TOTAL EXPERT

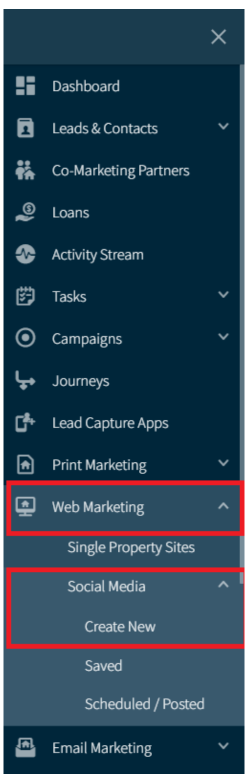
- **Comparison Images:** If applicable, provide a side-by-side comparison with a correct version of the template.

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

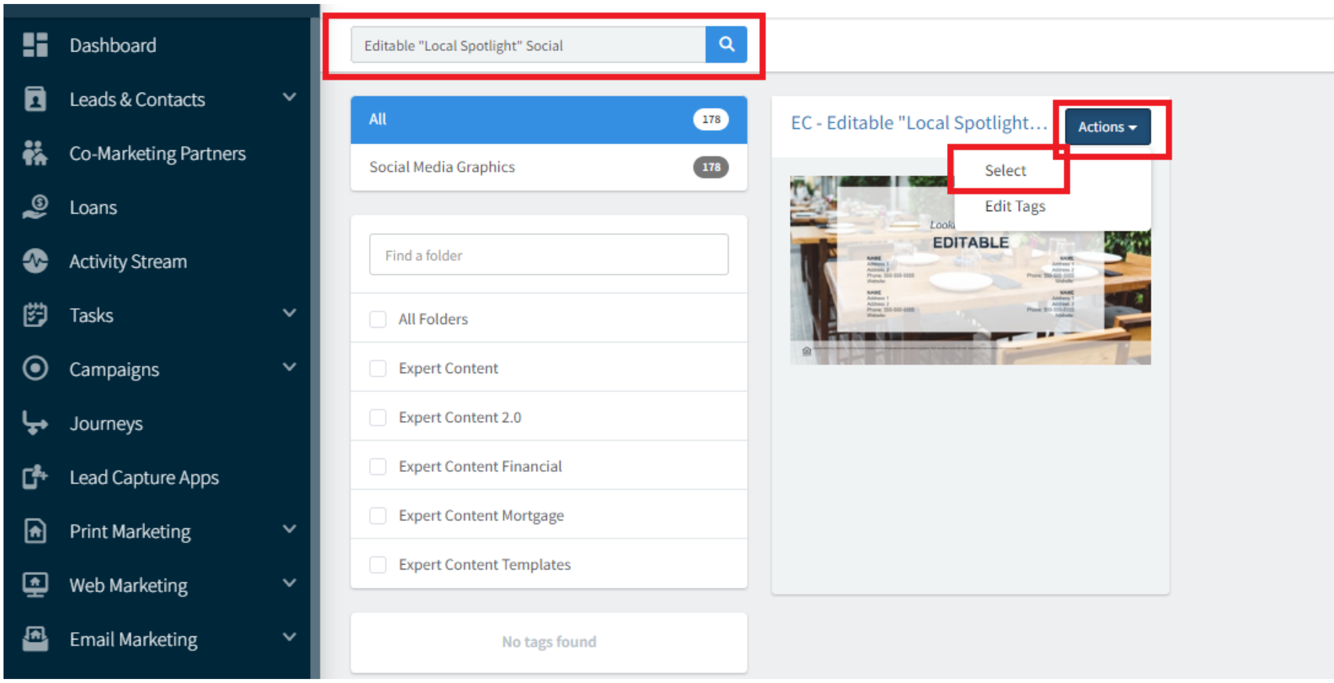
Step 1

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



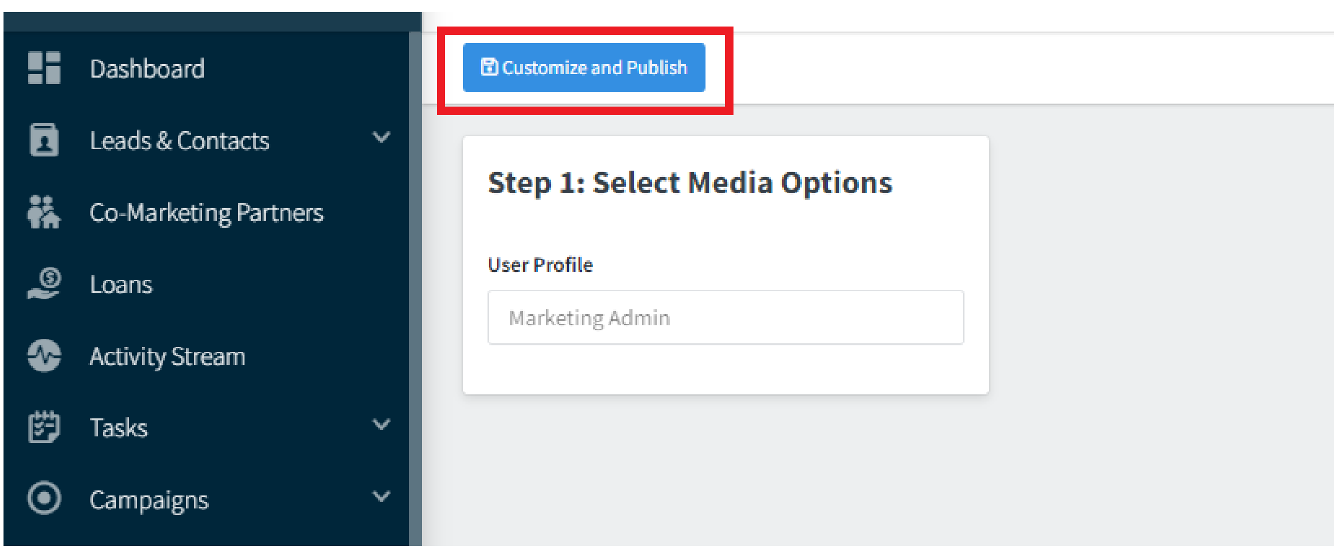
Step 2

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



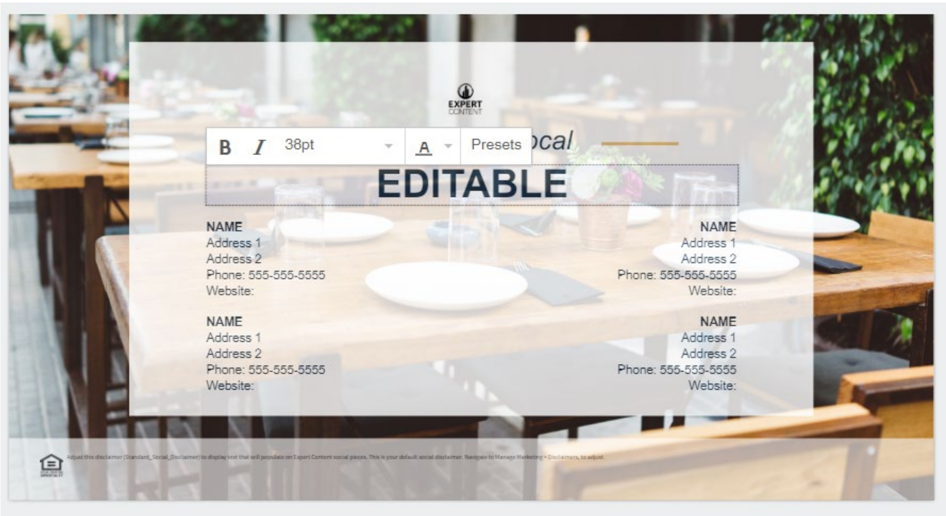
Step 3

- 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

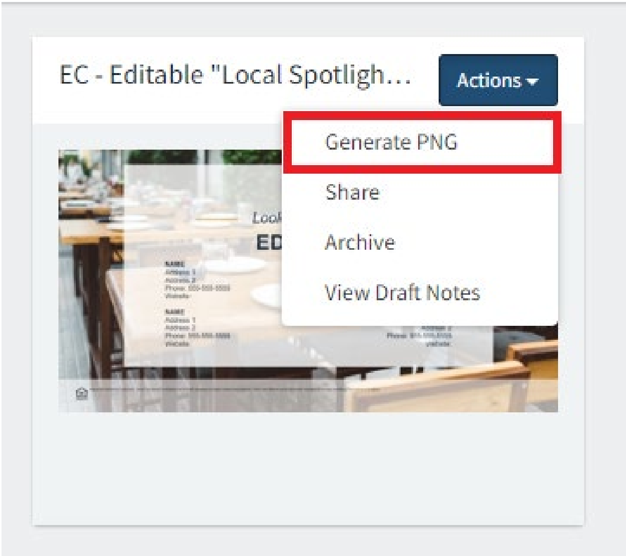
- Verify Test the editable fields by replacing placeholder text or photos.
- For text, apply new text to test that it will fit within the text box without overlap or cutoff. Test the font functionalities to see Bold, Italics, Font Size and Text Color are working correctly.
- For photos, apply new photo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

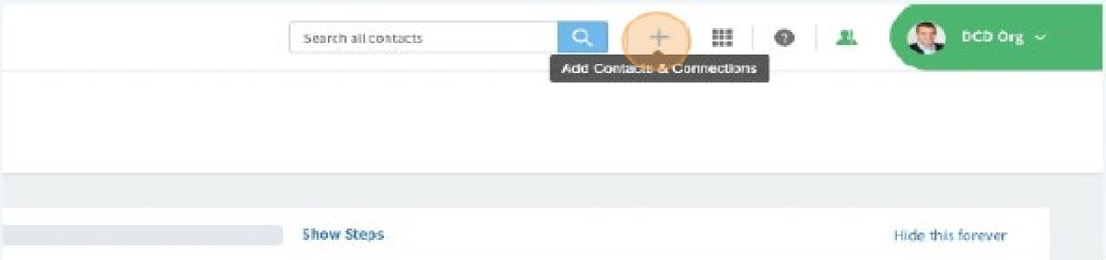
Testing Best Practices

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.

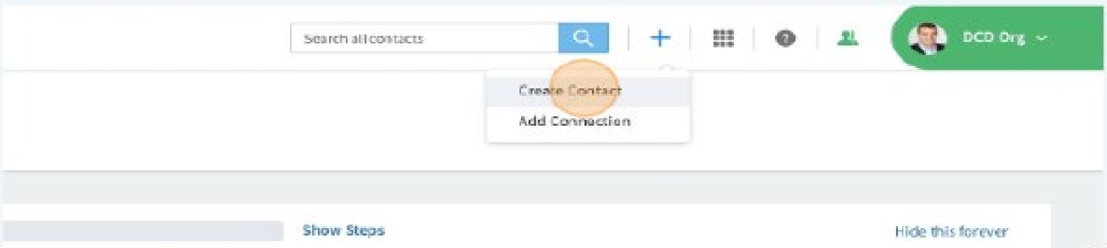
- **Viewing Modes**: Evaluate in different modes (dark and light).
- **Responsiveness:** Ensure readability and proper layout on desktop, mobile and tablet devices.
- **Cross-Client Testing**: Test across various email clients such as Gmail, Outlook, and Yahoo.
- **Operating Systems**: Mac vs PC.
- **Browsers:**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

Step-by-Step QA Process

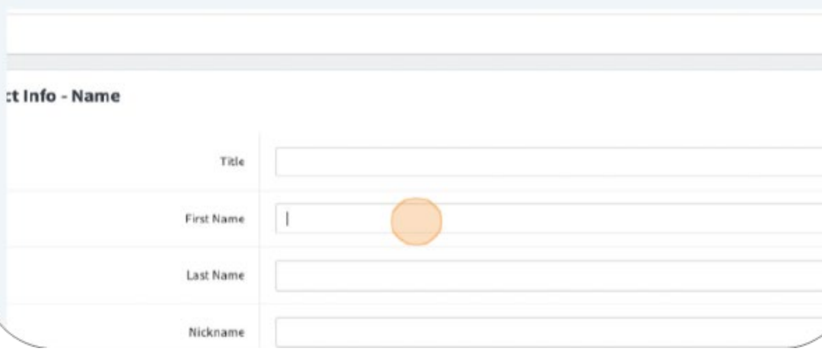
1 If you have not already created a contact associated with the your email address, navigate to the Total Expert Dashboard and click the "+" button on the top right.



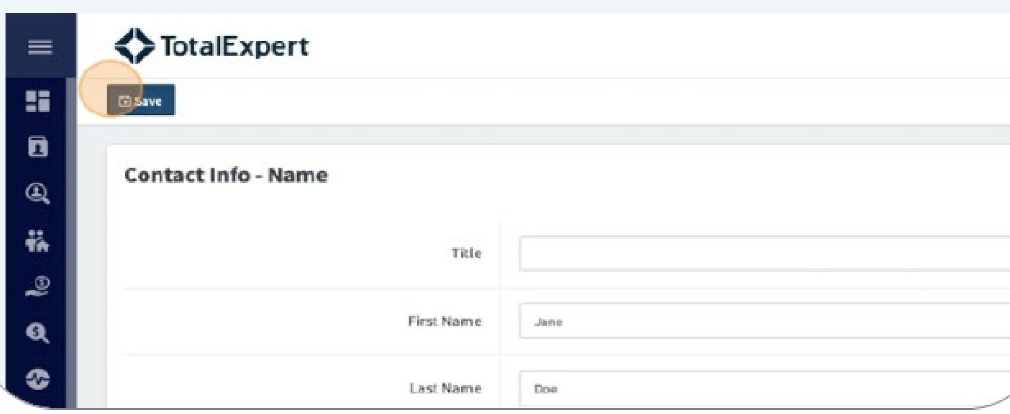
2 Click "Create Contact"



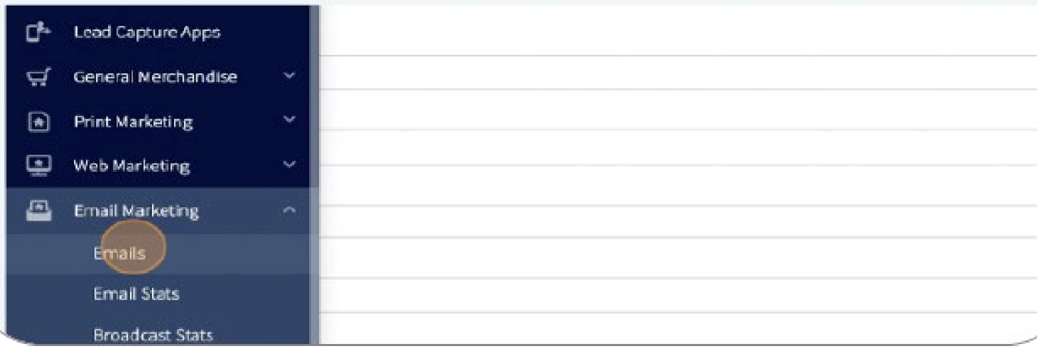
3 Enter your first name, last name and email.



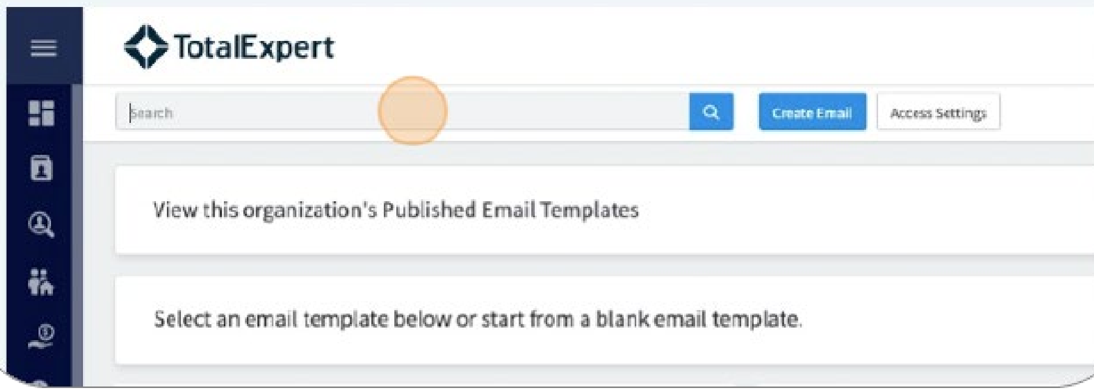
4 Click "Save"



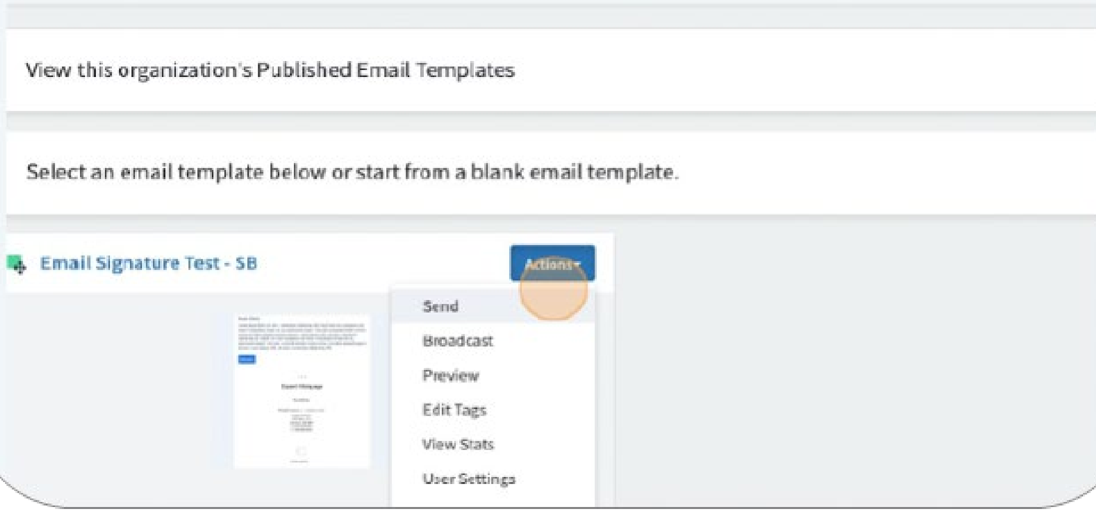
5 Navigate to "Email Marketing" and click "Emails"



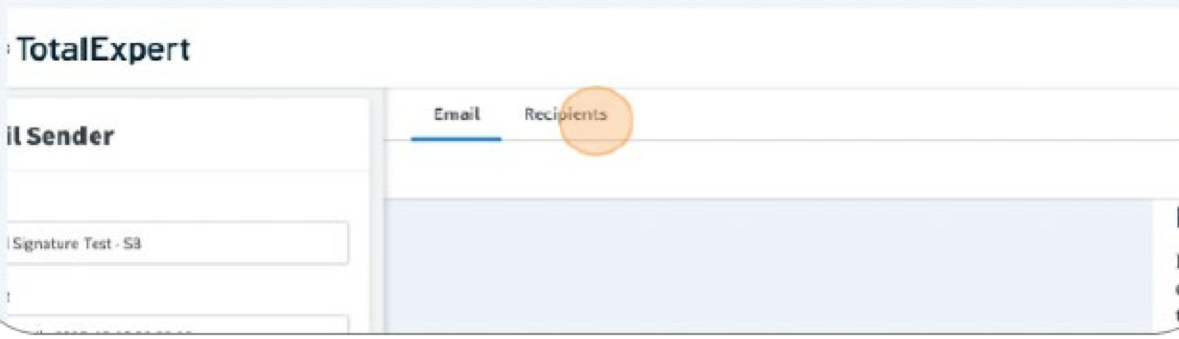
6 Click the "Search" field and type the name of the test email provided by your coordinator in the FreshDesk ticket.



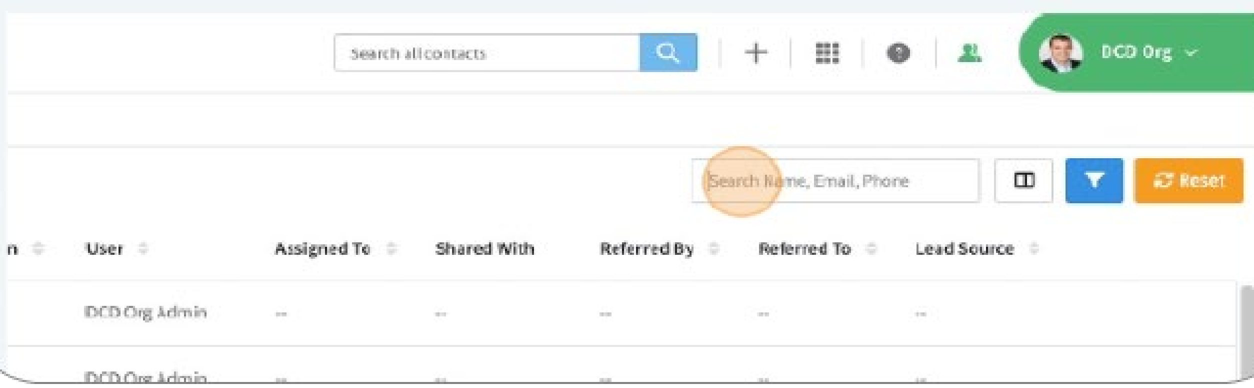
7 Click "Actions", then "Send".



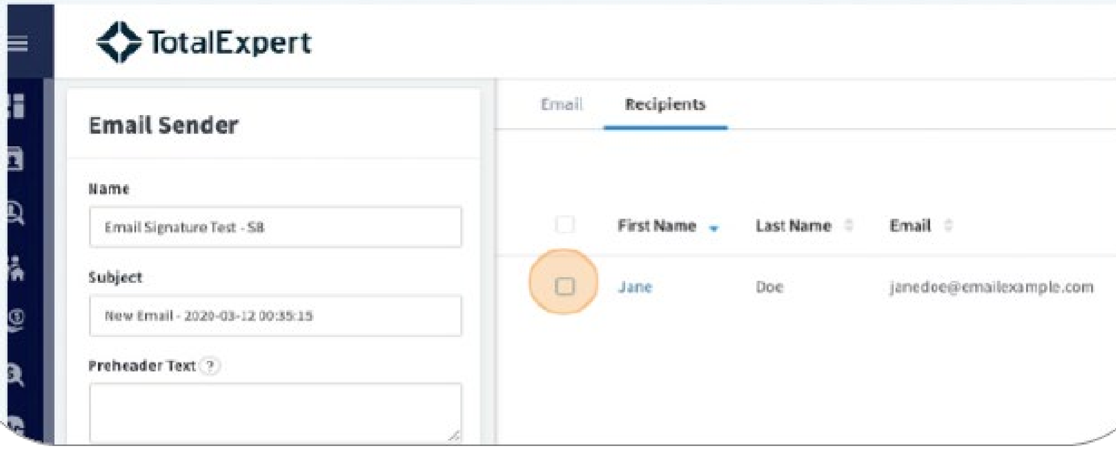
8 Click "Recipients"



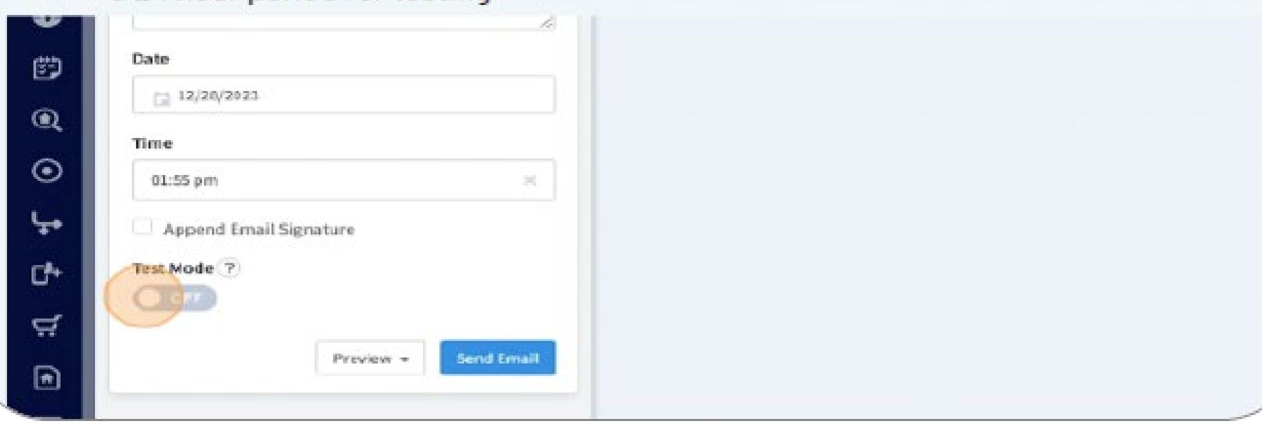
9 Click the "Search Name, Email, Phone" field and search for the contact you just created.



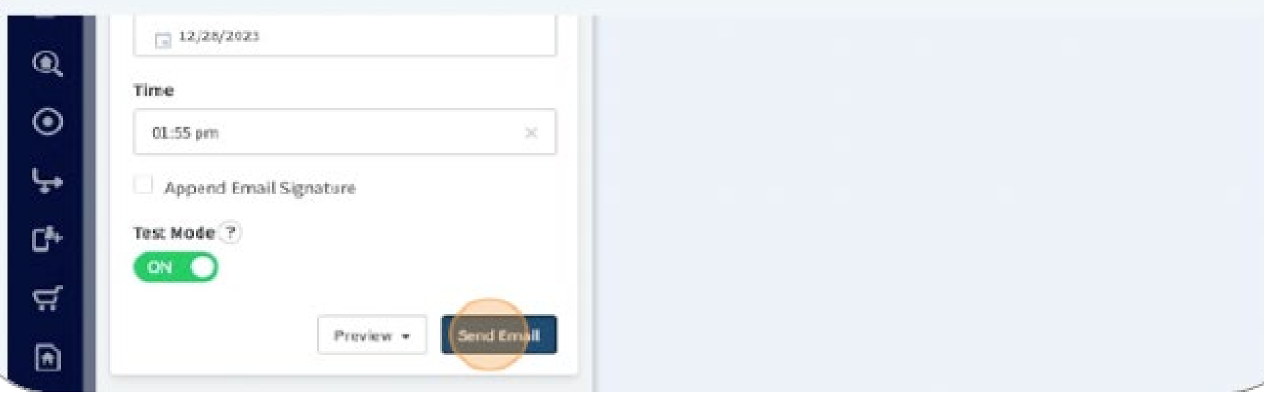
10 Select the appropriate contact.



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



12 Click "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:

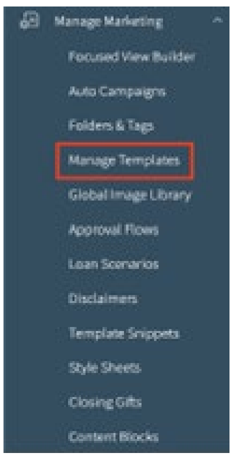
1. **Clear Description of the Issue:**
    - **What is the problem?** Describe what you are seeing versus what you expect to see.
    - **Where is it occurring?** Specify the part of the signature (e.g., name, title, contact information, social media icons) where the issue appears.
2. **Visual Evidence:**
    - **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

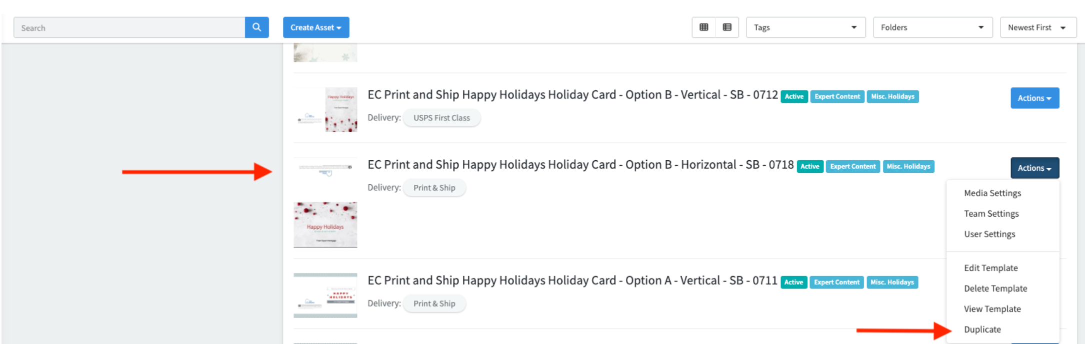
Step 1

- 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.

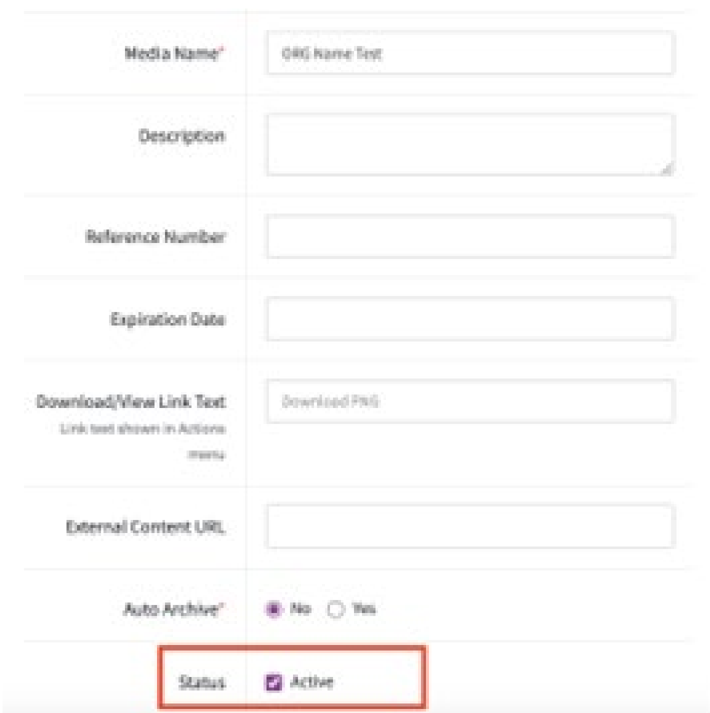


Step 3

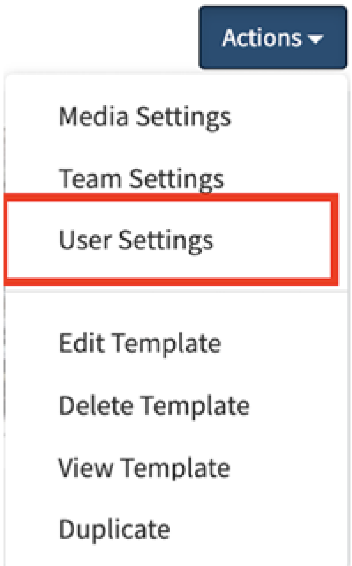
- Name The Media
- Check duplicate template setting box
- Click duplicate

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.

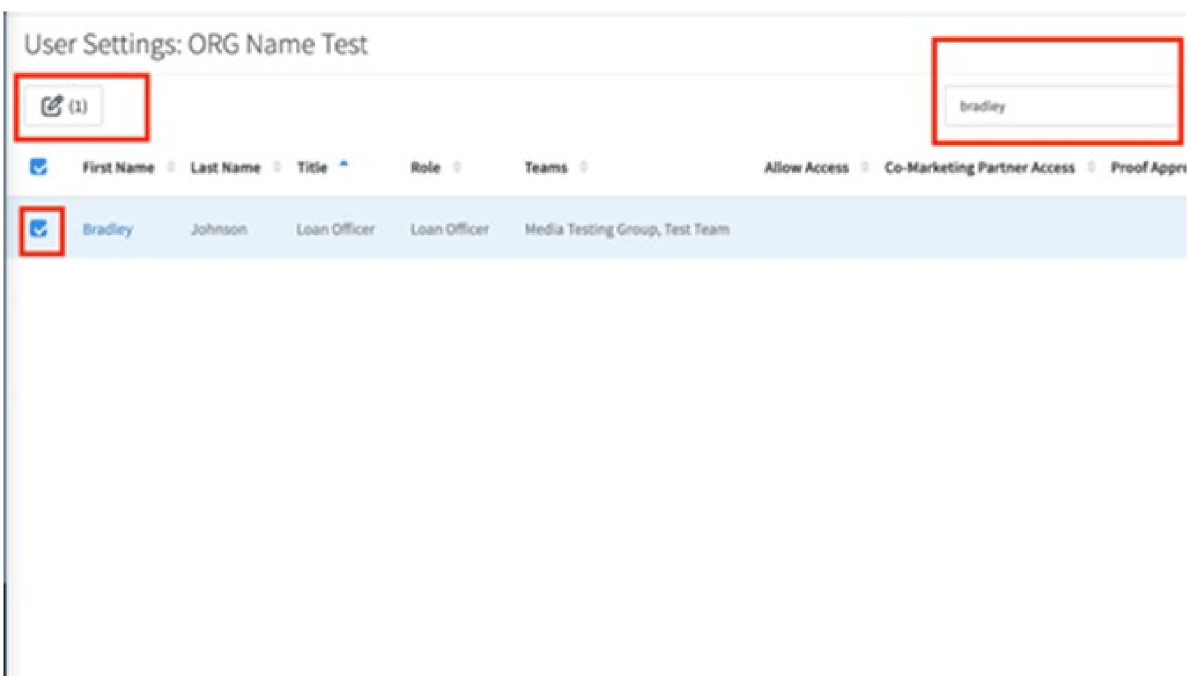


- Allow user access to your test user of choice by searching for the test template via Manage Marketing > Manage Templates
- Click > Actions > User Settings



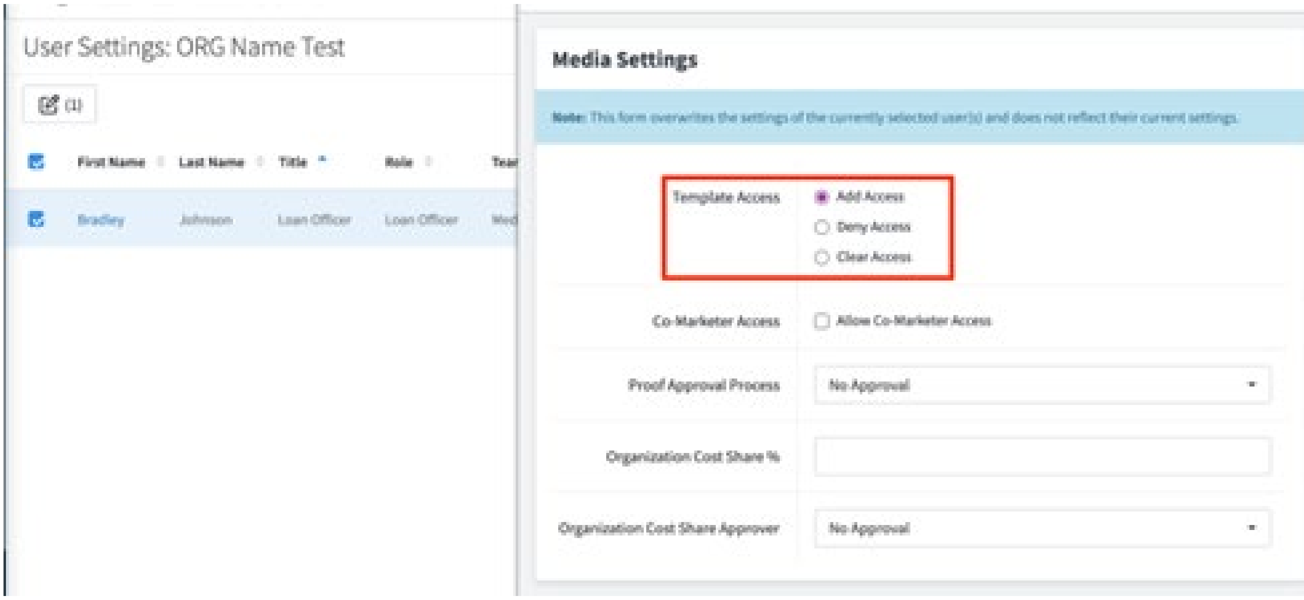
Step 5

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



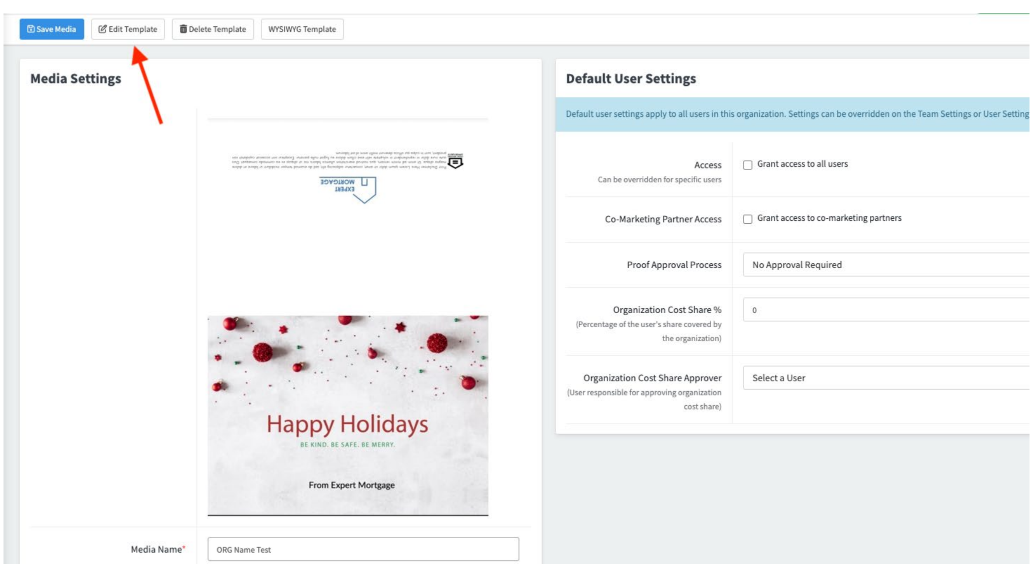
Step 6

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



Step 7

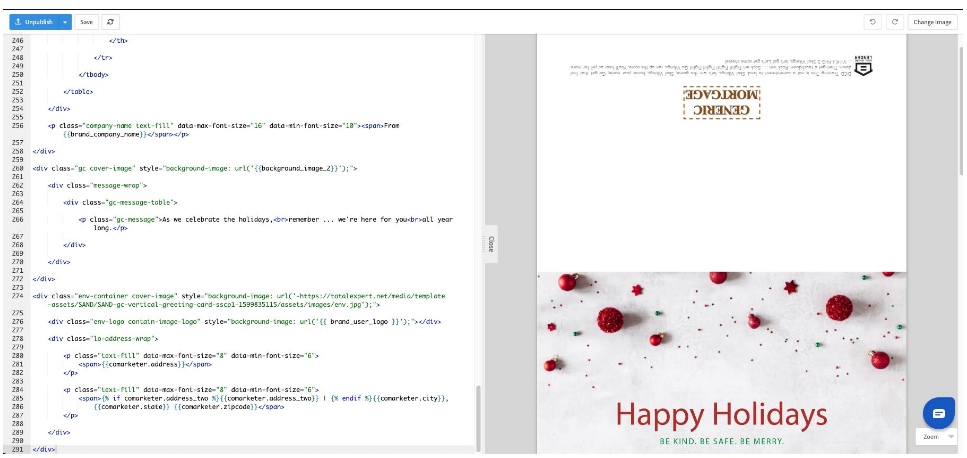
- Once media settings have been confirmed, select edit template at the top of the media settings page.



Step 8

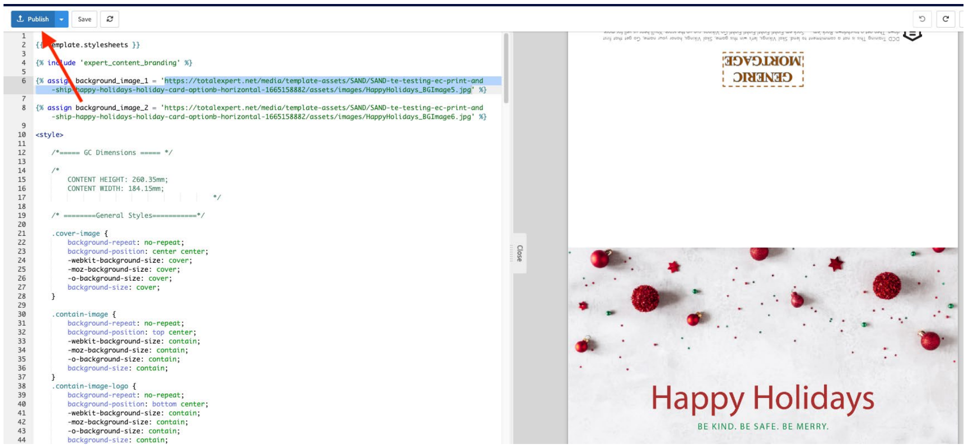
- Once in the template editing page make sure that all requested toggles and editable fields are present and functioning as intended.
- Toggle functionality page can be found here: [Toggle Checklist]
- A test image can also be added in this step to ensure that everything populates into the template as 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 2nd page will be upside down.



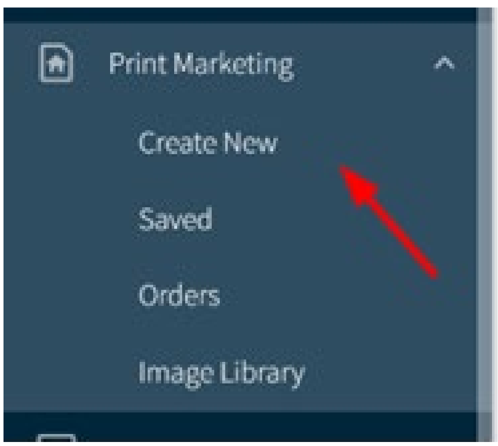
Step 9

- 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.



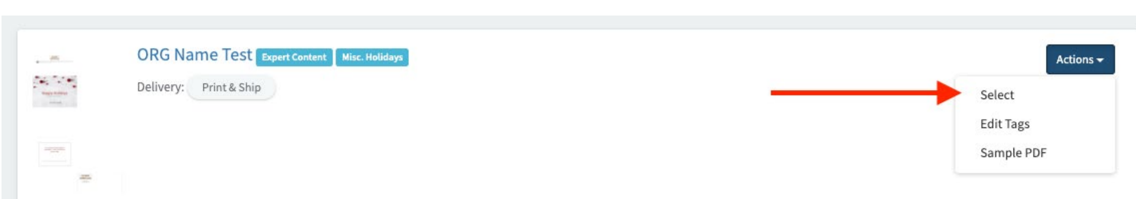
Step 10

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



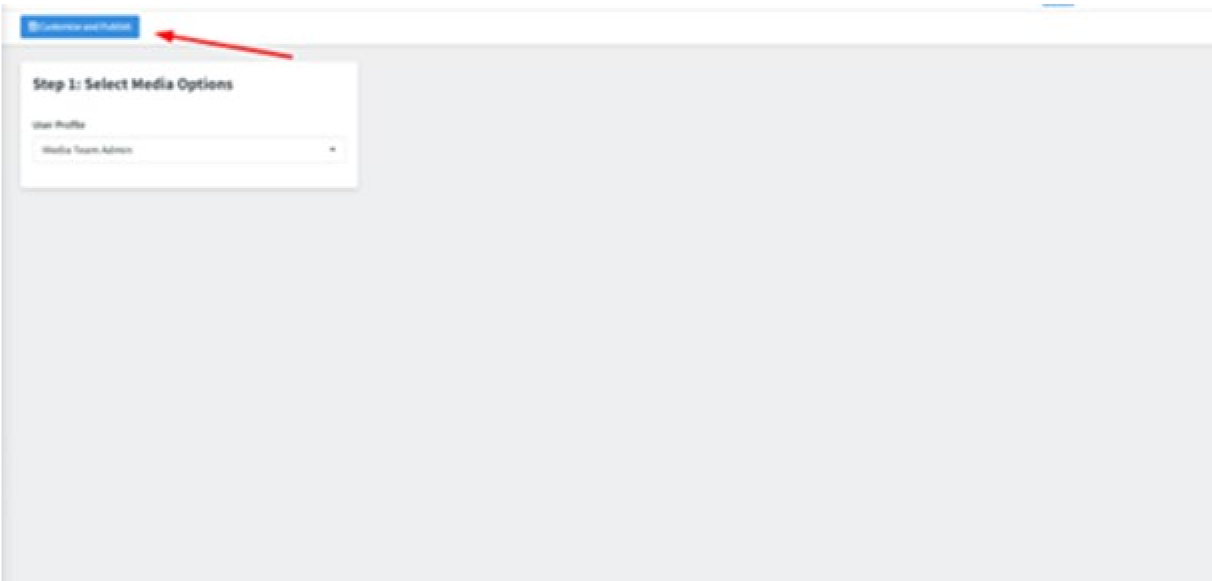
Step 11

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



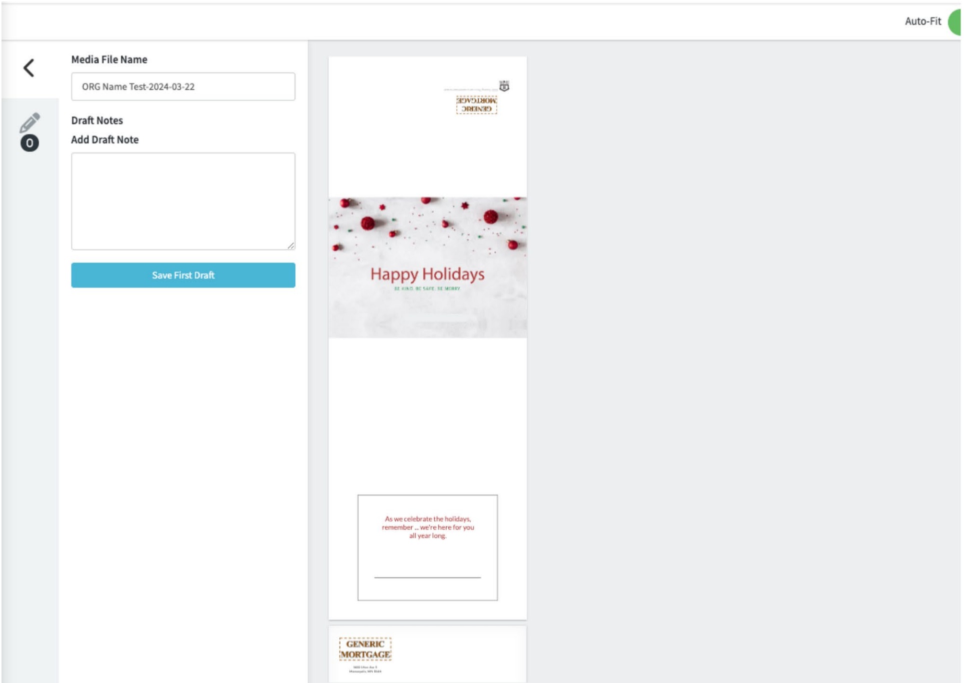
Step 12

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



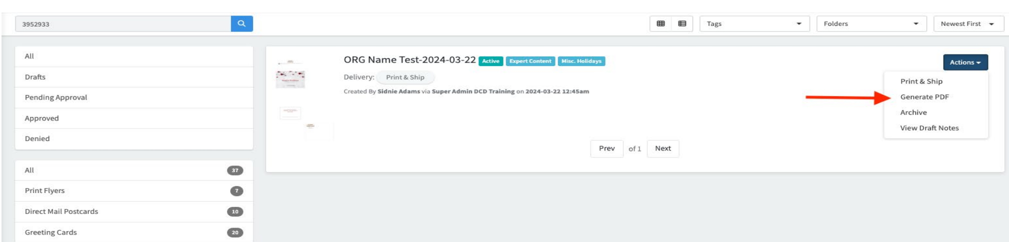
Step 13

- 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.

TOTAL EXPERT

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?