



FAQs

- What address is used as the return address on the printed envelopes?
 - The return address is populated from the address in the end-user's profile.
- What can my end users edit before ordering?
 - Users can edit their name in a Direct Mail card and wet sign in the Print and Ship cards (signature area is left blank). In both types, the standard greeting message and back logo image are editable to users if allowed by the Marketing Admin using the appropriate toggles.
- Can I upload a special holiday contact list?
 - Yes - Users can upload a list using the importer tool. Users can deactivate/archive the user group after cards are ordered unless a permission level has been set that the user can't archive.
- Where will the cards be shipped?
 - Print and Ship option: when ordering the "ship to" address automatically populates with the address from the user's profile. If you need to make an adjustment to the address, the user can make the necessary changes in that screen. Please ensure this address is up to date to avoid failed delivery. Note: If there is no one to receive the package, it may be returned to sender.
 - Direct Mail option: these will be delivered directly to the recipient list that was selected during the ordering process.
- Can we use the same design we used in a previous year?
 - If you'd like to use your art from a previous year, you can utilize the current self-serve template to upload your holiday card design. The sizing must be the same to be eligible for this year's program pricing.
- When I order my cards, how long will they take to be delivered?
 - Orders will be processed on a weekly basis (Friday). Including production and shipping, please allow 7-10 business days for delivery.
- Can we add a logo to the envelope?
 - The logo will automatically populate based on your branding set up.
- How can I personalize my cards?

- When you order as a bulk shipment, the cards will be delivered to you for addressing, stamping, and mailing. Please allow sufficient time so that your cards will be delivered to your recipients by your desired date.
- Are there Expert Content items available to order?
 - Yes, the Expert Content library includes several holiday greeting cards from prior years and self-serve Expert Content templates for Admins to create custom holiday greeting cards. The ordering process will be the same as the bulk and direct mail options.
- Can I update the fonts?
 - We are unable to update the fonts on the templates. If you would like additional customizations, please consult your Content Coordinator to create custom holiday cards for your library.
- Can we add “Sincerely, NAME” to the template code to add to customization?
 - The user’s name will prepopulate in the signature of the direct mail greeting card. No additional customizations can be made to the template. If you would like additional customizations, please consult your Content Coordinator.
- Can we customize the envelope font?
 - We are unable to update the fonts on the envelopes. If you would like additional customizations, please consult your Content Coordinator.
- Is end user information, Loan Officer, included on the card or just on the envelope as a return address?
 - Yes, the end user’s name is included underneath the greeting on the inside of the card for Direct-Mailed pieces. Non-direct mail pieces leave the signature blank for additional handwritten greetings and/or signatures.
- Can we add in a disclaimer? And where should that be placed?
 - We have added in the option to have disclaimers included on the Expert Content and Self-Serve templates. This can be toggled on and off as needed.

```

<!--
var: background_image_1
comment: Insert main image on asset
-->
{% assign background_image_1 = 'Insert URL here' %} 1
<!--
var: gc_message
comment: Standard Greeting Message
-->
{% assign gc_message = 'Happy Holidays' %} 2
<!--
var: gc_message_editable
comment: Assign variable 'yes' to make gc message editable to end user
-->
{% assign gc_message_editable = 'yes' %} 3
<!--
var: disc_ehl
comment: assign variable 'show' to populate disclaimer and eh logo
-->
{% assign disc_ehl = 'show' %} 4
<!--
var: editable_logo
comment: assign variable 'yes' to make logo editable to end user
-->
{% assign editable_logo = 'no' %} 5
<!-- Disclaimer Settings -->
<!-- The standard disclaimer(s) are included in the template. Ability to override that disclaimer or assign additional disclaimers below
EX disclaimer tag: {{organization.disclaimers.DISCLAIMER_NAME.content}}

<!--
var: override_disclaimer
comment: enter override disclaimer between the capture and end capture
-->
{% capture override_disclaimer %}{% endcapture %} 6
{% assign override_disclaimer = override_disclaimer %}

<!--
var: additional_disclaimer
comment: enter additional disclaimer between the capture and end capture
-->
{% capture additional_disclaimer %}{% endcapture %} 7
{% assign additional_disclaimer = additional_disclaimer %}

<!--
var: env_logo
comment: Black Logo URL
-->
{% assign env_logo = 'brand_user_logo' %} 8
{% assign DM = true %} 9

```

1. Design image added when using “Change Image” button.
2. Standard message that displays on the greeting card. Admins can update this message to match the design.
3. Allows the end user to edit this message. NOTE: the default setting is “yes” in the Direct Mail templates and “no” in the Print and Ship templates. To change the setting, simply remove the text “yes” or “no” from between the single quotations and type in “no” or “yes” as desired.
4. Displays your standard disclaimer and the EH logo from your branding setup. NOTE: the default setting is on. To turn this off, remove the text “show” from between the single quotations.
5. Allows the end user to edit the logo on the back of the card only. NOTE: the default is set to “no”. To make this logo editable, change the text to “yes” between the single quotations.
6. Add any override disclaimers as necessary. This will remove the standard disclaimer from the card and replace it with the text entered here.
7. Add any additional disclaimers as necessary. This will display your standard disclaimer as well as the additional disclaimers entered here.
8. Dynamically populates the logo associated with the user based on your organizations branding set up.
9. Allows the card to be direct mail. Do not edit on direct mail templates.