



Testing is an important part of every journey setup process. It allows for assumptions to be made about the data that is being including in each journey. The objective of a journey is to send the right message to the right contact at the right time. In this playbook, the best practice steps for testing journeys are outlined to allow admins confidence that the objective will be achieved upon publishing.

Journey Testing Glossary

Term	Definition
<i>Data Source</i>	AKA System of Truth- LOS, CORE or Data Warehouse system where all Contact/Loan/Account information is stored.
<i>Data Source Sync</i>	Frequency with which files containing your test persona and loan information are imported into Total Expert. This is most commonly done via API connection or automated SFTP import. You will want to confirm with your Implementation Manager or Customer Success Manager how frequently new data files and updates are imported and process and if it is possible to increase that frequency during this journey testing phase.
<i>Loan Origination Software (LOS)</i>	A software system that automates and manages the end-to-end steps in the loan process.
<i>LOS / Data Admin</i>	Sets up test users and data fields in the LOS.
<i>Marketing Admin / Project Manager</i>	Ensures that all data that would be needed to trigger marketing is accounted for in data source syncs. They also create all necessary emails and ensure they work properly.
<i>Test Persona / Scenario</i>	A test contact /loan record specific to a particular trigger, off-ramp or condition check within the journey. A new persona will need to be created for every trigger, off-ramp and condition check to test each component both ways (ensuring the correct contact/loan makes it through that component while the incorrect contact/loan does not make it through).

Recommended Personnel Resources



Role	Responsibility
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LOS/Data Admin

Journey Planning/Creation

- Ensure all onramp/offramp criteria are accounted for in test loans.
- Needs to be available in setting up data flow and the journey testing workshop
- Set up and maintain Customer test user
- Responsible for set up of data fields

Journey Testing

- This resource will be needed to ensure all onramp/offramp criteria are accounted for in test loans.

Marketing Admin/Project Manager

Journey Planning/Creation

- Attend all workshops related to Journeys/Data Mapping
- Responsible for ensuring that all data that would be needed to trigger marketing is accounted for in data source syncs
- Create all necessary emails
- Responsible for ensuring the journey is testing as expected for each scenario. This resource will likely be responsible for tracking testing results and making updates to the journey as needed.
- Ensure email content is passing as expected.

Journey Testing

- This resource will be responsible for ensuring the journey is testing as expected for each scenario. This resource will likely be responsible for tracking testing results and making updates to the journey as needed.
- This resource will also need to ensure email content is passing as expected.



Pre-Campaign Workshop Checklist

- Fill out Campaign Mapping Questionnaire provided by IM/CSM/Trainer.
- Connect to the TE Demo Admin account that you can connect test data to for journey testing purposes:
 - Verify that this account is associated with the external id in your test users data.
 - Verify the TE Demo Admin user is receiving test data from your system of record.
- Identify a testing account within your CRM/LOS/SFTP that can be connected via external_id to the Journey TE Test User Account identified above:
 - External ID's are the unique database key that connects your test users data to the user account in TE.
- Designate a test email account:
 - Should be able to be shared within the marketing team (or whoever will be responsible/participate in the journey testing).
 - TE best practice is to utilize Gmail.
- Verify default contact group for new borrower/co-borrower (relevant for lead journey only).
- Create all data source mappings necessary to facilitate testing - IM to validate mapping setup and ready to go:
 - Loans, Contacts, Accounts.
 - **Encompass** - You will work with your IM to create the mapping via the Kenzie Mae tool or using the TE mapping spreadsheet.
 - **Other LOS platforms** - Fill out the TE Mapping spreadsheet
 - **Other financial platform data (banks, Credit Unions, etc)** - Fill out the TE Account mapping spreadsheet for banking and CU's.
 - May need to temporarily increase data import frequency during journey testing period.



Test Plan Intro

Best practices for Successful Planning

- Each scenario needs to test successfully at least once. Customer to determine what success means to them.
- Plan out scenario fully before testing - this allows for easier review:
 - Create personas that should not enter the journey. (ie, for a purchase journey, create a persona that is a refinance loan; if a loan is to be closed in last 30 days, create a loan that is over 30 days).
 - Every on-ramp/offramp needs to be accounted for.
 - Every combination of in-line condition needs to be accounted for - every trigger has at least one contact go through. Make sure that contacts that SHOULD NOT enter journey do not.
- Ensure ample time for testing – each trigger may take up to an hour to test based on the trigger type and timing of TE’s LOS pulls.
- Determining Test Data:
 - Clear naming conventions for first name/last name.
 - Minimum contact/loan information.
 - Make sure that the data that is put into any LOS/Import.
- Fill out a testing plan worksheet: *****Minimum information*****
 - All scenarios determined with description.
 - Expected Result vs Actual Result for each scenario.
 - Scenario name.
 - Contact name.
 - Pass/fail.
 - Section to document any failure to troubleshoot later.
- Total Expert provides a test plan template.

Test Executing Requirements

IMPORTANT! Do not start testing until you confirm that everything on the checklist below has been completed.

- Test Plan Worksheet Completed
 - Make sure every trigger is being tested in at least one scenario.
 - Scenarios include both a positive and false positive paths
 - Document what you expected to happen versus actual results. *This will help you determine where the flaw(s) are so you can fix them quickly.*
 - Create test data that will allow for scenarios to continue to trigger/flow - Mindful of a specific data for in-line conditions and include minimal data fields to create loan/contact.
 - **EXAMPLE:** *Initial loan setup should include loan purpose, application date, but closing date kept blank.*
- The journey has been created and published to a TE Test User account
- Test Data created and ready to be input into LOS/SFTP/Data Importer

Executing the Test Plan

*****Verify Test Executing Requirements met before starting*****

1. Input information in "source of truth" examples:
 - Create test loan within LOS
 - Import contact list via importer
2. Validate contact/loan/product data is appearing within TE as expected:
 - Contact record
 - Loan record
 - Activity summary
 - Within LOS/data
 - Email account
3. Review data against test plan worksheet:
 - Did every onramp/offramp/condition check work as expected?
 - Are there missing contacts?
 - Verify correct email sent and rendering correctly
 - Verify Correct tags in email/task body
 - Correct Journey Status
4. Repeat steps 1-3 for every step in each test scenario - such as such as:
 - Timer delays
 - Contact/loan updates
 - Task Outcomes
 - Update contact within TE
5. Repeat steps 1-4 if test plan fails, after troubleshooting.
6. Update test plan to denote if testing scenario repeated (i.e., "Test 2" for last name).

Troubleshooting

If test plan fails - Common troubleshooting and fixes

**Retest after fix, contact TE support if all of the below did not solve issue for further troubleshooting*

Trigger did not fire or fired when it should not have:

- Did the data source update the contact/loan/account record?
 - Check if the data formatting is correct and troubleshoot sync. Examples, mapped to incorrect field,
 - Check that all required fields to create contact/loan record added
 - Check for integration limitations – some integrations require additional fields or may not trigger “on contact created”
 - Fix – update sync discrepancy/mapping
 - *Note: product panel configurations may not be showing custom fields the data even if it is coming through – check with TE Support how to add to User Interface or loan/account record*
- Did you allow enough time for the journey trigger to process?
 - Often the journey will trigger in less than 15 minutes after a contact/loan/product is updated.
 - Fix: Wait 15 minutes after contact/loan/product record updated, then start troubleshooting. If it is over 1 hour and you did all troubleshooting, contact TE support to see if there are any reported delays.
- Did you put in the correct parameters for contact/loan/product (loan purpose, loan type, valid email, etc).
 - Check-in line conditions against contact/loan/product
 - TE Interface tools to check – contact/loan/product record, validation tool
 - Fix – update test data and retry
- Did you select the correct field in the in-line condition?
 - IE, selected “closed loans” and the test data mapped to “funded loan”
 - Fix – update either in-line condition or test data point

- Did the spelling match in-line condition?
 - Compare in-line condition spelling versus data source
 - Fix – update either in-line condition or test data point

- Did you input the correct condition ranges?
 - Verify source of truth data accounts will meet ranges like “contains” “is equal to” may not include/exclude. IE – “is equal to Refinance” will exclude “Refi”
 - Fix: update logic to match all possible field outputs

- Did you complete the sequence correctly? Such as:
 - Updating data before pushing a timer delay
 - Selecting a task outcome
 - Fix – update the project test steps for the sequence, retest

- Did they meet all parameters but still should not have entered.
 - Review contact scenario and determine what data would be needed to exclude them.
 - Fix - Add additional in-line conditions

- Date triggers additional troubleshooting:
 - Did you put in the correct date (on date triggers) and shifts (future/past):
 - Date-based triggers are evaluated against all relevant contact, loan, or product data for the user the journey is running on behalf of once per day. This check runs at 8am UTC (3am EST/4am EDT).Fix: update test data for the condition to be met tomorrow

Note: *In real life, date updates may need to be triggered that exact date or may be a date in the past. An additional trigger for “would be done the day of/real-time, an additional “on contact/loan/account updated” trigger will be needed in the journey*

- *If the day is in the future, use “on loan date”*
- *If the day is in the past, use “loan updated”*
 - *With inline conditions*
- *Sometimes you will need both*

- Did you select the correct shift? See chart below



Email was not received, but all conditions above met:

- Did you set the email in test mode (applicable if sending the same email to same address on same day)?
 - Update the email template toggle
- Did copy all of the loan participants in emails (loan/product journeys only)
- Did you use the correct email trigger based on the record being reviewed?
 - Check if “loan participant email” for a contact trigger (on contact updated, date, etc) will not trigger.
 - Fix: Update to correct trigger
- Did you spell the email address correctly/check the correct account?
- For incorrect dynamic information within emails/tasks - review snippet tag spelling.

Sample Test Plan

Purpose

TE provides a sample Test Plan for your team to use. It is optional but it includes all best practice elements. TE recommends to use the plan or a similar format when testing ANY journey.

Worksheet 1 – Test Plan

This section allows for a step-by-step approach in testing each scenario. Each scenario is the “story” you are testing for contact. The tester will be separating out what action they need to do and what they expect to happen in a journey. The goal is that what occurs is what is expected, but if it does not this is easy to test.

Journey Name:				
TE Test User Account:				
Scenario 1:				
Contact(s):				
What are we testing?				
Step	Client Action	Expected Result	Pass/Fail:	Notes

- **Journey Name:** <Insert Journey Name> Ex: In-Process Milestone – Purchase – Email
- **TE Test User Account:** Best practice is to test in the “Demo Admin” or another demo account.
- **Scenario #:** Reference the scenario number in tab 3 “contact summary”, Column A
- **Contact(s):** insert all contact names that is associated with this scenario. Usually it will be one contact, but may be multiple if there are loan participants or user notifications to test.
- **What are we testing? Add description of the overall goal of this scenario.**
 - IE: Lead to Loan of a borrower/co-borrower. They both enter the journey as leads, they receive a few emails and the borrower opens the link in an email and applies for a loan. The LO should receive a task when the link is clicked and the borrower/co-borrower exit journey when the loan is created.
- **Steps:** numerical sequence of test actions. This will help make sure that order of operations is followed.
- **Client Action:** Manual Test components (Green/Yellow) in order to push through a journey. Have one action per line. Document action in tab 3 “Client Action Summary”
 - Examples: Add contact manually to TE, Add contact to group, create a loan in LOS, push timer delay, open email.

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- **Expected Result:** Document what is expected to occur within the journey when the action is taken.
 - Example: Enter journey X, then Journey Status changes to Y, Email is sent to borrower/co-borrower, stop at 3 day timer delay.
- **Pass/Fail:** when running the test plan document if the trigger worked.
 - *Best practice, if it fails, write notes of what happened and continue testing. Troubleshooting after testing all scenarios can save time.*
- **Notes:** Document what caused that step to fail. Keep blank if passed.
 - *Example: Contact was removed from journey instead of moving on to next step.*

Example:

Journey Name: Lead Purchase General - Medium Touch - v.2.0 - BP
TE Test Account User: Demo Admin

Scenario 1: Manually add to journey - successful loan - borrower

Contact: Harry Potter - Borrower Sampleemail+LPGMTT1S1@gmail.com

What are we testing? Lead that user adds manually to journey. They receive 3 emails and start a loan as a borrower. Contact clicks on email and apply now link. User will also be assigned a task.

Step	Client Action	Expected Result	Pass/Fail:	Notes
1	Manually Create contact and manually add to Journey	Trigger: "Manually Add Contact. Event Assign Group: Lead Purchase General - Medium Touch Trigger: Assigned To Group: LPG-MT Action: Change Journey Status: Lead Start Action: Send Email: LPG-MT E1 Event: 7 day timer delay stop		
2	Push Timer Delay	Action: Send Email: LPG-MT E2 Event: 9 day timer delay stop		
		Action: Assign A Task - Check in phone call		

Worksheet 2 - Contact Summary

A	B	C	D	E	F	G	H	
Scenario #	Scenario Name	Description of contact	First Name - required	Last Name - required	Email (recommend gmail address + Scenario # + Test #) - required	add columns for additional contact fields for journey triggers (birthdate, etc)	Loan Number (use same for borrower/coborrower) - required	add columns for additional loan fields for journeys (loan purpose, loan address, fl, date)
1a	Preapproval to Loan Close Borrower/Coborrower	Borrower that opens a loan and funds it successfully.	PreApproval Borrower	Test 1	Sampleemailscn1a1@gmail.com		12345	Status preapproval
1b	Preapproval to Loan Close Borrower/Coborrower	Co-borrower that opens a loan and funds it successfully.	PreApproval co-Borrower	Test 1	Sampleemailscn1b1@gmail.com		12345	Status preapproval
2	Cold Lead	Lead that does not close loan	Cold Lead	Test 2	Sampleemailscn2f1@gmail.com		None	

- Column A: Scenario Number** that this will be tested, should be numeric and sequential to help quickly identify when testing
 - If multiple contacts in scenarios, such as borrower/coborrower, name 1a, 1b, etc
- Column B: Scenario Name:** (ex: *Tell me who this person is*)
 - The general name you want that you will remember when validating contact
- Column C: Description of contact.** What is the story of this contact? Are they completing the loan? Are they going to be denied, etc. Describe here
- Contact Fields:**
 - First Name**
 - Required field**
 - Recommend names that are easy to understand – such as scenario name or shortened version. Such as “Loan Close Borrower”
 - Last Name**
 - Required field**
 - Recommend Test number, such as “Test 1”, this is so subsequent tests you can update to “Test 2”, “Test 3”, etc.
 - Email.** Unique email address for this contact.
 - Required Field, unless address or phone number used**
 - Best Practice - Gmail address and using mygmailname+scenario#/test#@gmail.com
 - Ex: mygmailname+scn1test3@gmail.com
 - Add additional column fields for contact data needed to trigger journey**
 - IE – birthdate, group, lead source, etc
- Loan Fields (delete if journey has no loan triggers)**
 - Loan Number**
 - Required field**
 - Can be numbers or letters
 - Loan External ID**
 - May be required for certain LOS/Importers
 - Add additional column fields for loan data needed to trigger journey**
 - IE - Loan Status, Loan Type/Purpose (typically purchase/refinance), Loan #, Loan external id (if using UI importer for data)

Worksheet 3: Client Action Summary

Client will write down all of the green and yellow triggers that they need, we need to be able to guide them in these triggers what the tester needs to do.

Triggers & Events (Green/Yellow)	In-line Conditions	Scenarios that test it	Comments
Manually Add Contact		1, 2	Requires tester to enter contact record and manually add contact into
Add Group Lead Purchase General - Medium Touch			Requires tester to enter contact record and manually add to group. Note this 3 will automatically occur if manually added to journey.
Loan Status Change	Status =	1, 2	Requires tester to create a loan in the LOS/SFTP/API/UI Uploader with minimal conditions. This only offramps borrowers; need to determine status. Alternate trigger could be Loan Created.
Timer Delays		1, 2, 3	Requires tester to enter contact record and manually push delay. 15 total, difference cadences
Task Marked As Complete		1, 2, 3	Requires tester to log into TE and mark the task as complete
Email Opened			1 Requires tester to enter email account and open it.
Email Link Clicked	Apply Now URL		2 Requires tester to open email and click on appropriate link
Unsubscribe		none	click "unsubscribe" link

Column A Triggers and Events: These are the Green/Yellow journey trigger actions that a tester will manually have to update in order to trigger the journey. Examples:

- Manually add contact: Requires tester to enter contact record and manually add contact into journey.
- Add Group: Requires tester to enter contact record and manually add to group. Note this will automatically occur if manually added to journey.
- Loan Status Change: Requires tester to create a loan in the LOS/SFTP/API/UI Uploader with minimal conditions. This only offramps borrowers; need to determine status. Alternate trigger could be Loan Created.
- Timer Delays: Requires tester to enter contact record and manually push delay. 15 total, difference cadences.
- Task Marked As Complete: Requires tester to log into TE and mark the task as complete.
- Email Opened: Requires tester to enter email account and open it.
- Email Link Clicked: Requires tester to open email and click on appropriate link

Column B Inline Conditions: Add any in-line condition needed to trigger, this will be helpful in troubleshooting if this action did not trigger.

Scenarios that test it: Add the scenario test numbers that this will be verified. Purpose is to make sure that each trigger is accounted for.