



Technical Writer Test - Publishing a Collateral

January, 2021

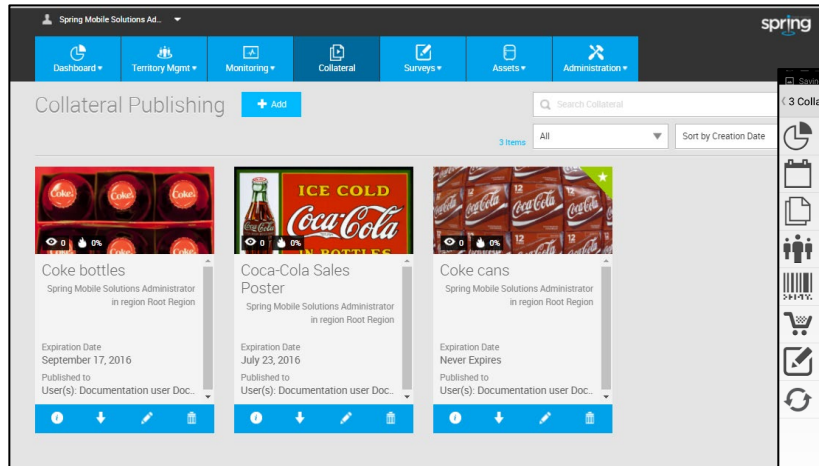
1. Introduction

mSeries™ lets back office users publish and control content sent to field users in a simple and direct way. Back office teams have all the necessary tools to establishing the target audience, the validity period of the document being shared and even monitoring how often the file is accessed. Thus, mobile users have access to up-to-date content when and where they need it.

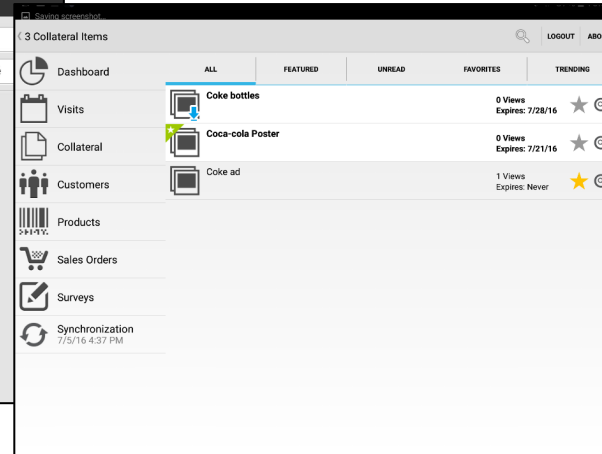


2. What is the mSeries™ Collateral module?

Collateral, in marketing and sales, is the collection of materials used during the sale and distribution of a product - like brochures, folders, etc. The Collateral module allows publishing documents directly to field users (Example: all users from region X receive a specific collateral) or indirectly to users (Example: all users who visit customer X receive a specific collateral).



Back office (Web Portal)



Field User (Mobile app)

3. Publishing collaterals

Step 1 – Click the “+Add” button to start publishing.

The screenshot displays the Spring Mobile Solutions Administrator interface. At the top, a dark navigation bar contains the user profile 'Spring Mobile Solutions Ad...' and the 'spring' logo. Below this is a blue toolbar with icons for Dashboard, Territory Mgmt, Monitoring, Collateral, Surveys, Assets, and Administration. The main content area is titled 'Collateral Publishing' and features a red dashed box around the '+ Add' button. To the right of the title is a search bar labeled 'Search Collateral' and two dropdown menus: 'All' and 'Sort by Creation Date'. Below these are three collateral items, each with a thumbnail image and a title:

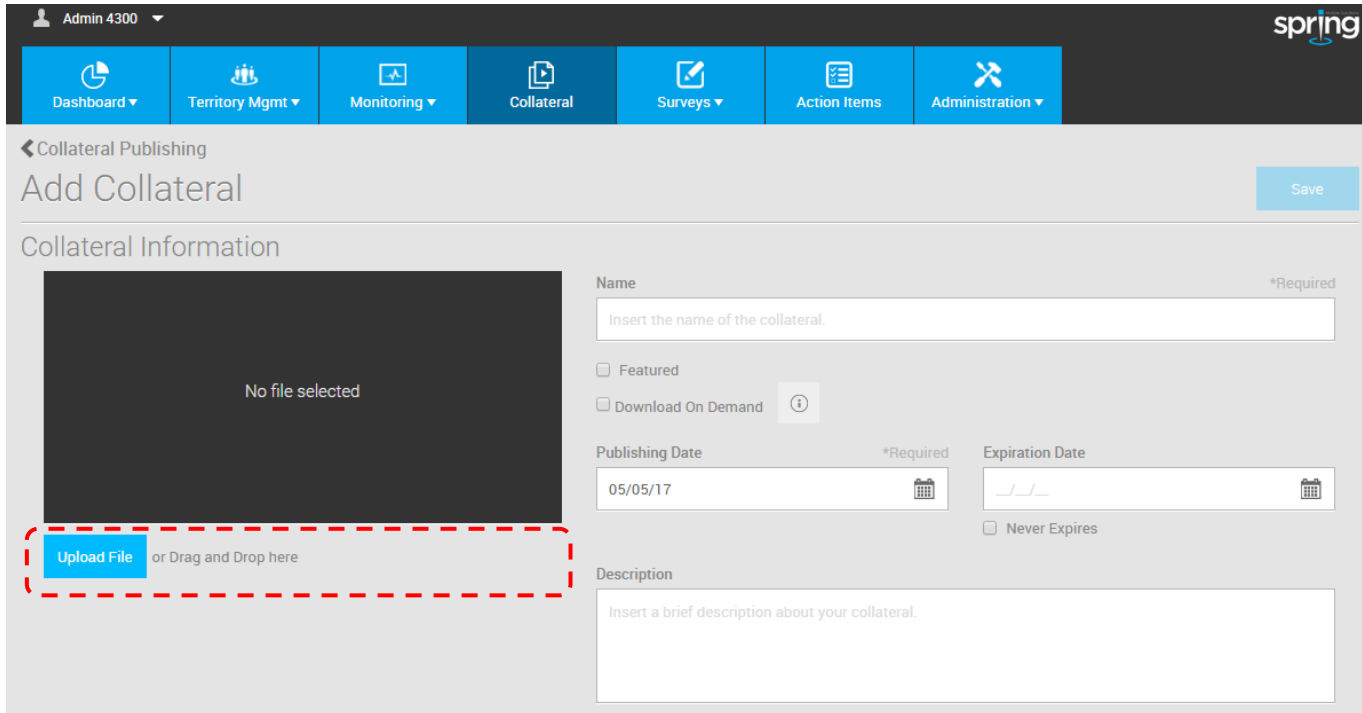
- Coke bottles**: Spring Mobile Solutions Administrator in region Root Region. Expiration Date: September 17, 2016. Published to: User(s): Documentation user Doc..
- Coca-Cola Sales Poster**: Spring Mobile Solutions Administrator in region Root Region. Expiration Date: July 23, 2016. Published to: User(s): Documentation user Doc..
- Coke cans**: Spring Mobile Solutions Administrator in region Root Region. Expiration Date: Never Expires. Published to: User(s): Documentation user Doc..

Each item has a blue action bar at the bottom with icons for information, download, edit, and delete. A large, faint globe icon is visible in the background on the right side of the screen.

3. Publishing collaterals

Step 2 – Upload your file:

Click “**Upload File**” at the bottom of the page. You can also drag or drop a file.



The screenshot shows the 'Add Collateral' page in the Spring application. The top navigation bar includes 'Admin 4300' and the 'spring' logo. The main menu has options: Dashboard, Territory Mgmt, Monitoring, Collateral (selected), Surveys, Action Items, and Administration. The page title is 'Collateral Publishing' and the sub-header is 'Add Collateral'. A 'Save' button is in the top right. The 'Collateral Information' section features a large dark grey box with the text 'No file selected'. Below this box is a red dashed rectangle containing a blue 'Upload File' button and the text 'or Drag and Drop here'. To the right of the file upload area are form fields for 'Name' (with a '*Required' label), 'Publishing Date' (with a '*Required' label and a calendar icon), and 'Expiration Date' (with a calendar icon). There are also checkboxes for 'Featured', 'Download On Demand' (with an information icon), and 'Never Expires'. A 'Description' text area is at the bottom right.

Admin 4300

spring

Dashboard Territory Mgmt Monitoring Collateral Surveys Action Items Administration

Collateral Publishing

Add Collateral

Save

Collateral Information

No file selected

Upload File or Drag and Drop here

Name *Required

Insert the name of the collateral.

☐ Featured

☐ Download On Demand ⓘ

Publishing Date *Required

05/05/17

Expiration Date

__/__/__

☐ Never Expires

Description

Insert a brief description about your collateral.

3. Publishing collaterals

Step 3 – Fill out the form:

Complete form filling by clicking a text field and typing. You can add a checkmark if it never expires.

Admin 4300

spring

Dashboard ▾ Territory Mgmt ▾ Monitoring ▾ Collateral Surveys ▾ Action Items Administration ▾

Collateral Publishing

Add Collateral

Save

Collateral Information

No file selected

Upload File or Drag and Drop here

Name *Required

Insert the name of the collateral.

☐ Featured

☐ Download On Demand ⓘ

Publishing Date *Required Expiration Date

05/05/17

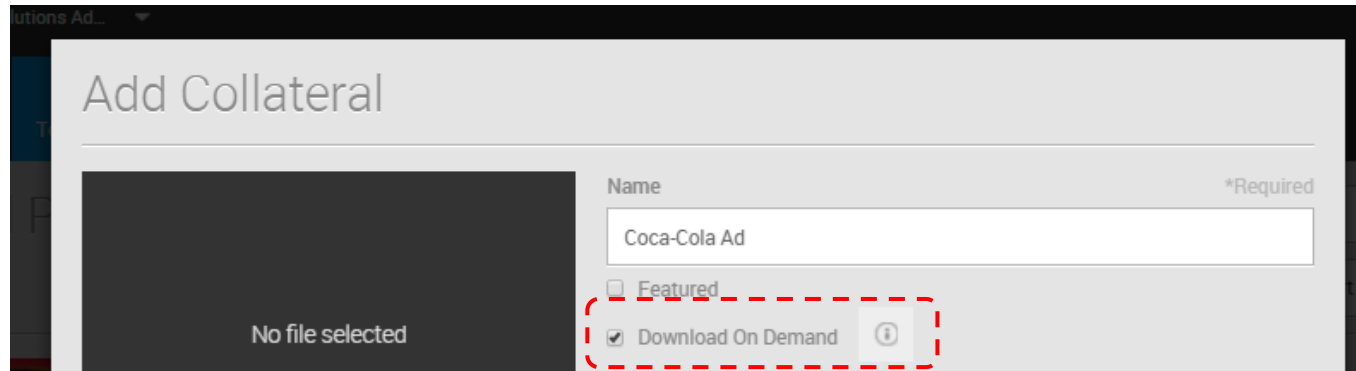
☐ Never Expires

Description

Insert a brief description about your collateral.

3. Publishing collaterals

Step 4 – Check the “**Download On Demand**” checkbox.



The screenshot shows a web interface for adding collateral. On the left, a dark grey box contains the text "No file selected". To the right, there is a form with a "Name" field containing "Coca-Cola Ad" and a "*Required" label. Below the name field, there are two checkboxes: "Featured" (unchecked) and "Download On Demand" (checked). The "Download On Demand" checkbox and its label are enclosed in a red dashed rectangular box. To the right of the "Download On Demand" checkbox is a small circular icon with an information symbol. The background of the interface is light grey.

Add Collateral

No file selected

Name *Required

Coca-Cola Ad

☐ Featured

☒ Download On Demand ⓘ

3. Publishing collaterals

Step 5 – Publishing Criteria:

Check the “**Publish only to**” checkbox to start

Admin 4300

spring

Dashboard

Territory Mgmt

Monitoring

Collateral

Surveys

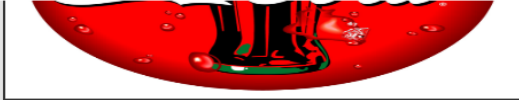
Action Items

Administration

Collateral Publishing

Add Collateral

Save



Change File

enjoy-coca-cola.jpg

Publishing Date

*Required

05/05/17

Expiration Date

05/11/17

☐ Never Expires

Description

Coke ad

Publishing Criteria

☐ Publish only to:

Criterion

Select your options

3. Publishing collaterals

Step 6 – In the select boxes you can choose the Region, User and Product Classification, then enter data in the respective fields. You should hit the enter button to separate each information.

Admin 4300

spring

Dashboard Territory Mgmt Monitoring Collateral Surveys Action Items Administration

Collateral Publishing

Add Collateral

Save

Publishing Criteria

☒ Publish only to:

Region

4300

User

Admin 4300

Product Classif.

12-Pk 5184 .06-DOz Plas Pch Nr 10-Pk 240 CCrb Suja Essentials - Noon Greens 100%

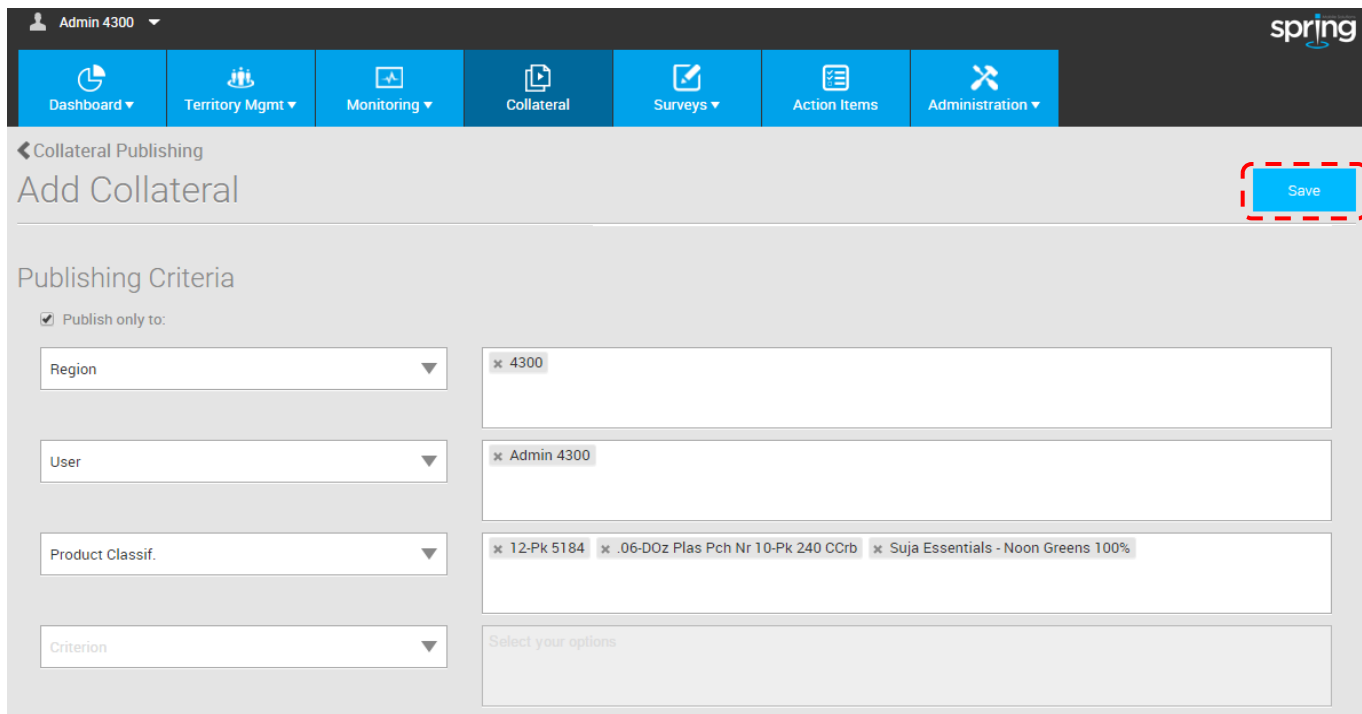
Criterion

Select your options

3. Publishing collaterals

Step 7 – Send your form:

After you have filled the form, save it by clicking on “**Save**” at the top of the page.



Admin 4300

spring

Dashboard Territory Mgmt Monitoring Collateral Surveys Action Items Administration

Collateral Publishing

Add Collateral

Save

Publishing Criteria

☒ Publish only to:

Region

User

Product Classif.

Criterion

x 4300

x Admin 4300

x 12-Pk 5184 x .06-DOz Plas Pch Nr 10-Pk 240 CCrb x Suja Essentials - Noon Greens 100%

Select your options