



Technical Writer Test - Publishing a Collateral

January, 2021

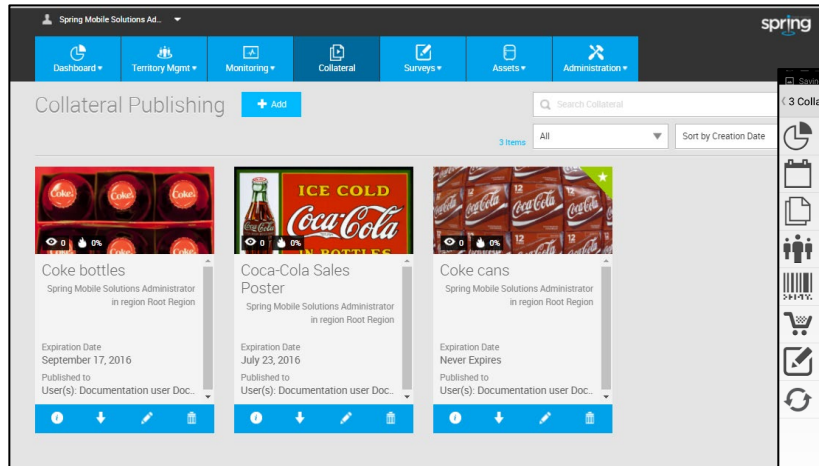
1. Introduction

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.

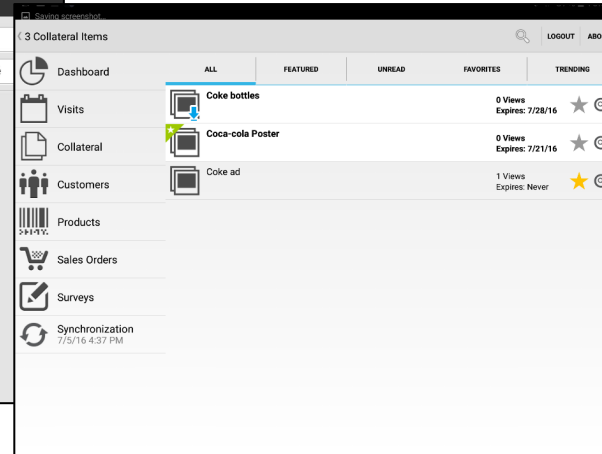


2. What is the mSeries™ Collateral module?

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: [...]

The screenshot displays the 'Collateral Publishing' interface in the Spring Mobile Solutions Administrator. The top navigation bar includes links for Dashboard, Territory Mgmt, Monitoring, Collateral, Surveys, Assets, and Administration. The 'Collateral' link is active. Below the navigation bar, the 'Collateral Publishing' section is visible, featuring a '+ Add' button highlighted with a red dashed box. A search bar labeled 'Search Collateral' and a dropdown menu set to 'All' are also present. The main content area shows three items, each with a thumbnail image and a title: 'Coke bottles', 'Coca-Cola Sales Poster', and 'Coke cans'. Each item card includes the publisher 'Spring Mobile Solutions Administrator in region Root Region', an expiration date, and the user 'Documentation user Doc..'. The 'Coke bottles' and 'Coke cans' items have an expiration date of September 17, 2016, while the 'Coca-Cola Sales Poster' has an expiration date of July 23, 2016. The 'Coke cans' item is marked as 'Never Expires'. Each item card also features a blue action bar at the bottom with icons for information, download, edit, and delete.

Spring Mobile Solutions Ad...

spring

Dashboard Territory Mgmt Monitoring Collateral Surveys Assets Administration

Collateral Publishing + Add

Search Collateral

3 Items All Sort by Creation Date

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..

3. Publishing collaterals

Step 2: [...]

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: [...]

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

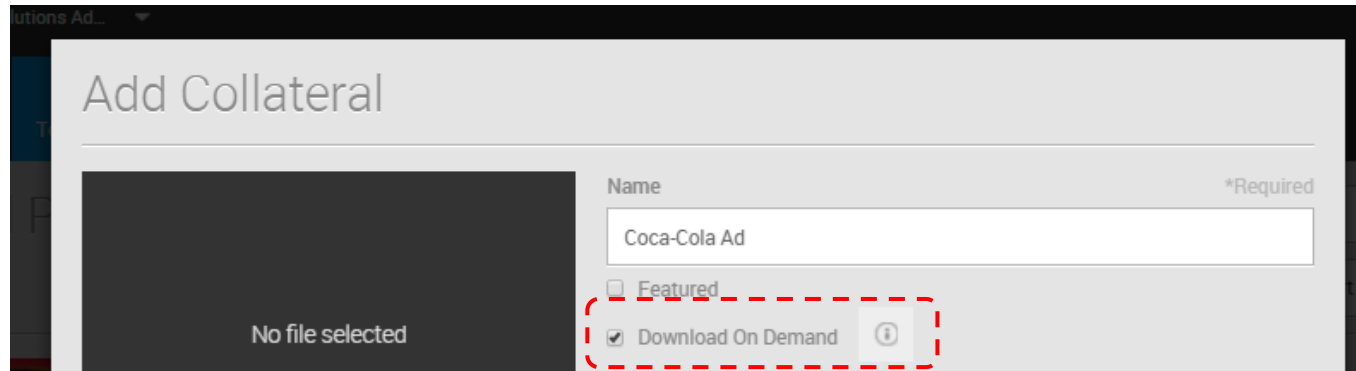
Description

Insert a brief description about your collateral.



3. Publishing collaterals

Step 4: [...]



The screenshot shows a web form titled "Add Collateral". On the left, there is a dark grey rectangular area with the text "No file selected". To the right of this area, the form contains the following elements:

- A label "Name" followed by a text input field containing "Coca-Cola Ad". The label "*Required" is positioned to the right of the input field.
- Two checkboxes: "Featured" (unchecked) and "Download On Demand" (checked).
- A red dashed rectangular box highlights the "Download On Demand" checkbox and the text "Download On Demand".
- To the right of the "Download On Demand" text is a small circular icon containing an information symbol (i).

3. Publishing collaterals

Step 5: [...]

Admin 4300

spring

Dashboard

Territory Mgmt

Monitoring

Collateral

Surveys

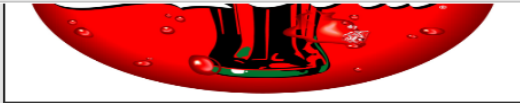
Action Items

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: [...]

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



3. Publishing collaterals

Step 7: [...]

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