**NCOA – UX Feedback on HTML Pages**

**Last updated: Thursday, August 6, 2015**

# **lobby-page**

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| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Get Started Content Module | I know it’s not in the Copy Deck, but I believe the client wants **three** **unique** CTA links per User Type (formerly on-click of View a sample Terms of Use >) because the Terms content is unique for each. On-click for View End-User Terms of Use >, View Service Provider Terms of Use >, View Service Bureau Terms of Use > launches a secondary browser window per each. Please see: <http://xewp8t.axshare.com/#p=vpo_ncoa_product__lobby__page__signed_in_> for layout of how the three links will be structured. | Add CTA links; on-click launch PDFs in a secondary browser window |  |
| Get Started Content Module | I am not sure why there are separate **Sign In** or **Sign Up** buttons. In the Copy Deck and wireframes it’s a single button labelled **Sign In or Sign Up**, see: <http://xewp8t.axshare.com/#p=vpo_ncoa_product__lobby__page__pre-signed_in__-_fa> and this should be mimicked in the HTML, since it routes to the same Custom Sign In/Sign Up page: <http://xewp8t.axshare.com/#p=sso_-_step_0_-_ncoa_sign_in___sign_up_custom_page> -- which, as per Lia’s email, you need to design. | Aggregate 2 buttons to 1; build Sign In/Sign Up custom pge |  |
| Benefits Module | The module subheader – “Why clean your customer address data with NCOA Mover Data service” – should be positioned underneath the header “Benefits”. | Add line break after header |  |
| Benefits Module | Need a period at the end of the sentence: “…profiling and insights.” | Add period at the end |  |
| How It Works Module | The module subheader – “Understanding the Program” – should be positioned underneath the header “How it Works”. | Add line break after header |  |
| How It Works Module | Remove the link “…(see Terms of Use for full details):” as now there will be three Terms of Use CTAs (see: above) so can’t have only one CTA link to Terms. | Delete link |  |
| How it Works Module | Ensure that the “…our Mover Media offerings…” links to the correct destination URL: <https://www.canadapost.ca/web/en/products/details.page?article=advertise_with_us_au> in a secondary browser window. | Ensure URL launches |  |
| Looking for an NCOA Mover Data provider? | As Lia wrote in her email (of 08/04), you need to build out the modal overlay lightbox table (grid) of the service providers, you can see this on-click of the **Service Bureaus** button. | Build out the modal overlay |  |
| Looking to become a Service Bureau? module | Although it is not specified in the Copy Deck, there should be a distinct subheader here to parallel the look-and-feel with the side-by-side “Looking for an NCOA Mover Data provider?” module. The subheader should be what you currently have as the first sentence in the body copy: “Interested in developing your own NCOA software?” So position this as the subheader underneath the “Looking to become a Service Bureau” header. | Reconfigure the body copy as the subheader |  |
| FAQ 1 | For the “How does the NCOA Mover Data service work” FAQ, there is too much white space after the end of the body copy and FAQ 2. This spacing needs to be minimized. | Fix spacing |  |
| FAQ 2 | Above the table, there should be the text: “You can apply NCOA Mover Data to your data in one of two ways:” which is missing in the HTML. This text needs to be added. | Add this copy |  |
| FAQ 3 | For the “What’s an existing relationship” FAQ, there is too much white space after the end of the body copy and FAQ 4. This spacing needs to be minimized. | Fix spacing |  |
| FAQ 3 | For the “What’s an existing relationship” FAQ, in the Copy Deck and the wireframes there is italicized copy. For some reason the italicized copy has been removed in the HTML. See: <http://xewp8t.axshare.com/#p=vpo_ncoa_product__lobby__page__pre-signed_in__-_fa_2> – shouldn’t the italicized copy be there to represent the stakeholders’ intentions? | Make the specified copy to be in italics | Come back |
| FAQ 4 | For the “What can I not do with the data?” FAQ, the first sentence has the boldface: “You **cannot** use the data:” and this formatting should be maintained. Also, this first sentence and the bulleted list afterwards use a different font type/size, which looks weird. The font size/type should be the same for the bulleted points as the introductory sentence. | Add bold, standardize font type |  |
| FAQ 5 | For the “How do I begin processing NCOA Mover Data?” FAQ, there is too much white space after the end of the body copy and FAQ 6. This spacing needs to be minimized. | Fix spacing |  |
| FAQ 6 | For the “How many years are included in the NCOA Mover Data Service?” FAQ, there is far too much white space after the end of the body copy and the “Additional questions” section. This spacing needs to be minimized in a big way. | Fix spacing |  |

# **termsofuse-01-setup**

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| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Your Profile Information tooltip overlay | Unclear why “Business name: Acme Inc.” is one of the fields on-display in the tooltip; this data should be represented in the open text field for question “1. Enter your legal business name”. To have that displayed in the field and the tooltip overlay would confuse the user, especially since they can change the legal business name. It’s also not in the Copy Deck. | Delete “Business name: Acme Inc.” |  |
| 1. Enter your legal business name | I understand that the form field highlights in red and the error validation text “This is a required field” displays where the user clicks the **Continue** button and the business name is not entered, but should the red highlights turn back to black once a user enters the legal business name? | Ensure that the red highlights and text vanishes |  |
| 2. Assign an alternate contact field | I know we discussed this in our conference call (07/31) but I’m still not sure why client side cannot handle error validation if the Alternate contact email address is not entered with the error validation text as: “Invalid email format”. Cannot this be implemented in the HTML? | Add in client-side error validation for the field |  |
| 2. Assign an alternate contact field | There should be hint text in this field prior to entry: “Enter Email in name@companyname.com format”. Why has this hint text not been implemented in the HTML? | Enter the hint text |  |
| 3. Select your user type | I understand that the radio buttons/copy highlight in red where the user clicks the **Continue** button and the user type is not selected, but should the red highlights turn back to black once a user makes the selection? | Ensure that the red text highlights vanish |  |
| 3. Select your user type | For consistency, place the explanatory text: “I will be licensing NCOA Mover Data directly from Canada Post” underneath the identifying text: “**I am a Service Bureau.**” This will make it consistent with the other two types, which have the explanatory text underneath the identifying text. | Move the explanatory text for Service Bureau below |  |

# **termsofuse-02-agree\_to\_terms\_of\_use**

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| --- | --- | --- | --- |
| **Element** | **Comment** | **Action / Update** | **Updated On** |
| I acknowledge and agree | I understand that the checkbox highlights in red and the error validation text “This is a required field” displays where the user clicks the **Continue** button and the Term is not selected, but should the red highlights turn back to black once a user checks a Term? Right now on-click the checkbox is selected into its on-state, but the red highlights and error text remains. | Ensure red highlights and error text vanishes |  |
| Terms #1 and #2 | I’m pretty sure that the copy for the Terms of Use are being imported from Innovapost, but FYI there will be no text formatting in the content. So, please remove the bold text for the two Terms headers: “NCOA Mover Data may only be used to:” and “I SHALL NOT use the NCOA Mover Data to:”. This also enables the “I acknowledge and agree” functionality to stand out from the static Terms content. | Remove boldface from the 2 Terms |  |
| Term #1 | Given the removal of formatting as mentioned above, the two bullet points in Term #1 needs to be replaced by a) and b) as in the Copy Deck and wireframes as seen here: <http://xewp8t.axshare.com/#p=ncoa_terms_of_use_step_2a__agree_to_terms_of_use__> | Replace bullets in Term #1 |  |

# **termsofuse-03-completed**

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| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Page File Name | This HTML page name should be termsofuse-03-review (not “completed”). | Change name |  |
| Contact Information | For some reason, the text “**Alternate contact:** jane.doe@acme.ca” is positioned here but there is also a separate section for “Alternate Contact” – delete the first iteration that is here underneath “Contact Information”. | Delete first “Alternate Contact” |  |
| User Type | In the wireframes I positioned the “User Type” above the “Alternate Contact” section, as you can see here in the End-User “Review” page: <http://xewp8t.axshare.com/#p=ncoa_terms_of_use_step_3a__review__end-user_> -- it makes more sense to have this content above “Alternate Contact”. | Move “User Type” section B4 “Alternate Contact” area |  |
| User Type | For consistency, place the explanatory text for “User Type” underneath the identifying text: “**I am an End-User.**” And note that it should read: “I am **an** End-User”, not “I am a End-User”. This will make it consistent with the termsofuse-01-setup HTML page, in which the “User Type” identifying text is on a separate above row than the explanatory text. | Move the explanatory text for all User Types below identifying text |  |
| Final T&C | The copy for the final T&C needs to be changed to read as follows: “I affirm that I am authorized to act on behalf of the company, firm or organization and that I possess all necessary legal authority to sign on behalf of the company, firm, or organization.” Please update this copy, it’s a late change. | Update the text on this T&C |  |
| Final T&C – Error Message | It is hard to gauge this because it is a flat HTML file, but please ensure that there is client-side error handling attached to the final T&C; if the user does not click the checkbox and clicks the **Agree to NCOA Terms of Use** button, the checkbox will highlight in red and the “This is a required field” text will appear in red. | Ensure error handling and application of validation messaging |  |

# **termsofuse-04-pending**

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| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Next Steps | “Steps” should be capitalized to align with the first-letter-caps of “Contact Information”. | Make “Next Steps” in caps |  |
| Contact Information | The format seems broken; the introductory text (“It is important…”) shouldn’t be condensed in one column – except in mobile responsive view obviously. So this text should be stretched across both columns, so it does not look so condensed in Desktop and Tablet views. | Stretch the Contact Info introductory text |  |
| Contact Information | Since the introductory text should straddle both columns, move the actual “**Address:** 233 Mowat Ave, Unit 204 Toronto ON M4M 3N6” to column one. | Move the “Address” field to first column |  |
| Contact Information | Need to add larger-text subheader “Alternate Contact Information” and the text “**Alternate contact email address:** <jane.smith@acme.com>, see: <http://xewp8t.axshare.com/#p=ncoa_terms_of_use_step_4a__completed_-_pending__en> – to differentiate this from rest of Contact Information. | Fix subheader formatting |  |

# **termsofuse-05-completed**

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| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Introductory Text | “We received and approved your End User NCOA Terms of Use on <DATE>” should be hyphenated: “We received and approved your End-User NCOA Terms of Use on <DATE>”. | Update the text to “End-User” |  |
| Introductory Text | Put these sentences on two lines: “Please keep this notice for your records, as it contains your NCOA Terms of Use ID.” and “Provide your ID to your NCOA provider. They will need it before they can clean your data.” They describe two separate functions so shouldn’t be a single line. | Insert a line break between the two sentences |  |
| Important Information about your… Text | Put these sentences on two lines: “Your ID is valid for 12 months. You must re-accept Terms of Use before its expiry on <YYYY-MM-DD> to avoid service interruptions.” and “Reminder emails will be sent to both the primary and alternate contacts starting 60 days before the expiry date.” They describe two separate functions so shouldn’t be a single line. | Insert a line break between the two sentences |  |
| Contact Information | The format seems broken; the introductory text (“It is important…”) shouldn’t be condensed in one column – except in mobile responsive view obviously. So this text should be stretched across both columns, so it does not look so condensed in Desktop and Tablet views. | Stretch the Contact Info introductory text |  |
| Contact Information | Since the introductory text should straddle both columns, move the actual “**Address:** 233 Mowat Ave, Unit 204 Toronto ON M4M 3N6” to column #1. | Move the “Address” field to first column |  |
| Contact Information | Need to add larger-text subheader “Alternate Contact Information” and the text “**Alternate contact email address:** <jane.smith@acme.com>, see: <http://xewp8t.axshare.com/#p=ncoa_terms_of_use_step_5a__completed_-_approved__e> – to differentiate this from rest of Contact Information. | Fix subheader formatting |  |
| Find Canada Post approved NCOA Mover Data services or software | The link “Find Canada Post approved NCOA Mover Data services or software“ should launch the 2015 Licensed NCOA Service Bureaus modal overlay. As Lia wrote in her email (of 08/04), you need to build out the modal overlay lightbox table (grid) of the service providers, you can see this on-click of the NCOA Mover Data services or software link. | Build out the modal overlay |  |

# **email\_pending\_ncoa\_terms\_of\_use-e**

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| --- | --- | --- | --- |
| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Next Steps | Forgot to insert the “\* some exceptions may apply” that’s right-justified alongside the sentence that contains the asterisk “1 business day\*”. | Need to add in  “\* some…” text |  |
| Contact Information | There is too much white space beneath the **View my NCOA Dashboard** and two much grey space (the grey box) above Contact Information section; both the white space and grey space needs to be minimized. | Needs to fix spacing issues. |  |
| Contact Information | The Contact Information has fields that have the second word of the label capitalized, e.g. “First Name”, “Last Name”, Job Title” and “Email Address”. The second word of the label should not be capitalized, ergo: “First name”, “Last name”, “Job title” and “Email address”. | Fix the capitalization |  |

# **email\_approved\_ncoa\_terms\_of\_use-e**

|  |  |  |  |
| --- | --- | --- | --- |
| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Introductory Text | Put these sentences on two lines: “Please keep this notice for your records, as it contains your NCOA Terms of Use ID.” and “Provide your ID to your NCOA provider. They will need it before they can clean your data.” They describe two separate functions so shouldn’t be a single line. | Insert a line break between the two sentences |  |
| Important Information about your… Text | Put these sentences on two lines: “Your ID is valid for 12 months. You must re-accept Terms of Use before its expiry on <YYYY-MM-DD> to avoid service interruptions.” and “Reminder emails will be sent to both the primary and alternate contacts starting 60 days before the expiry date.” They describe two separate functions so shouldn’t be a single line. | Insert a line break between the two sentences |  |
| Contact Information | Remove the “**Alternate contact:** jane.doe@acme.com” line item. As opposed to in the online display, this field should *not* be displayed here. | Remove this field |  |
| Next Steps | Remove the last line above the **View my NCOA Dashboard** button: “Find Canada Post approved NCOA Mover Data services or software.” This doesn’t work in the context of the email because the online view has this content launching as a modal overlay pop-up; ultimately, the grid is not that important to reproduce as a PDF or HTML page., so delete the line. | Remove this sentence |  |

# **email\_denied\_ncoa\_terms\_of\_use-e**

|  |  |  |  |
| --- | --- | --- | --- |
| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Email Title | There actually is a title to this email, also represented in the Copy Deck, in boldfaced, larger font: “**NCOA Terms of Use Request**”. This is missing. | Add email title in title font type |  |
| Spacing in signature | There should be a line break and space between “Kind regards,” and “The Canada Post NCOA team”. | Insert line break and space |  |
| Spacing above footer | There is far too much white space beneath the “The Canada Post NCOA team” and the email footer; the white space needs to be minimized. | Needs to fix spacing issues |  |

# **email\_alternate\_contact\_ncoa\_terms\_of\_use-e**

|  |  |  |  |
| --- | --- | --- | --- |
| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Dear Jane Smith, | Problem here is that the Primary Contact only enters the email of the Alternate Contact in Step 1: of the Terms of Use *[see: termsofuse-01-setup.html]* so there cannot be a proper name displayed here. *The Copy Deck is incorrect.* Result: Display email address only, as can be seen here on the wireframe prototype: <http://xewp8t.axshare.com/#p=email_4__terms_of_use_alternate_contact_notified> | Change the dynamic proper name to dynamic email address |  |
| John Doe in Introductory Paragraphs | There are multiple mentions of “John Doe” in the introductory paragraph; however this is dynamic content so it should look as follows: <John> <Doe> (to represent <First Name> and <Last Name>). | Change the name to be in chevrons |  |
| Text in Introductory Paragraphs | At the end of the second introductory paragraph, there is the text “…create a Canada Post business profile by selecting the link below.” But this is actually a button. *So the Copy Deck is incorrect.* The text should read: “…create a Canada Post business profile by clicking on the button below.” | Change the text *(also change in Copy Deck)* |  |
| Your NCOA Terms of Use ID | In the HTML the “**Your NCOA Terms of Use ID:** SB23456789 [PDF icon]” are linkable to the PDF. However, the Alternate Contact user is not yet linked to the ToU and so has no access to the Terms of Use PDF. The link and PDF icon need to be removed. | Remove ToU link and PDF icon |  |
| Email footer: Unsubscribe | I’m pretty sure we are removing the **Unsubscribe** copy in the email footer because the Alternate Contact user is not yet linked to the ToU and so has no access to the Dashboard. So this **Unsubscribe** paragraph in the email footer needs to be removed. | Remove the unsubscribe paragraph |  |

# **dashboard-01-manage\_my\_terms\_of\_use**

|  |  |  |  |
| --- | --- | --- | --- |
| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Welcome to your NCOA Dashboard 1st time user modal | The copy: “1. Select the user type that best describes how you will use NCOA Mover Data Service” is missing “the” between “use” and “NCOA”, so: “…you will use the Mover Data service”. *The Copy Deck is also wrong.* | Change the text *(also change in Copy Deck)* |  |
| Welcome Copy | Should not have a period after “Hello Jack.,” welcome… and also, only “**Jack**” (the first name) should be in boldface, not “**Hello Jack.,**” | Remove period, bold |  |
| Instructional Text | Ensure that the text on this screen “You have not yet created a Mover Update Terms of Use” *only* applies to when there is no Terms of Use ID listed; in this HTML screen, there is a Terms of Use ID listed. Therefore, ensure that the instructional text reads: “Select an ID to view your NCOA Terms of Use.” | Update instructional text for all iterations w/ ToU IDs |  |
| Terms of Use ID table column | When there is an existing Terms of Use ID visible, there must be the PDF icon and linkable ToU ID (e.g. EU5234567890). Here there is a Terms of Use ID, but it is static text. All viewable (Active/Inactive/Denied) Terms of Use IDs should have the clickable PDF icon and ToU ID hyperlink. See this example of Manage My Terms of Use ID, End-User: <http://xewp8t.axshare.com/#p=ncoa_dashboard__manage_my_terms_of_use_1a__end-use> | Add in PDF icon and hyperlink to the Terms of Use ID for the |  |
| Secondary Contact table column | Oops, this was a UX mistake, the column should read “**Alternate Contact**” (in boldface text) instead of “Secondary Contact”. | Change the column header |  |
| Create your first NCOA Terms of Use button | Although this is correct for when users have no Terms of Use ID listed, in this HTML screen, there is a Terms of Use ID listed. Therefore, the button should be dynamic and should read: “Create NCOA Terms of Use” (not “Create your first NCOA Terms of Use” like it currently does for users with no existing Terms of Use ID). | Ensure the button is appropriate per state |  |

# **dashboard-02-manage\_my\_terms\_of\_use**

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| --- | --- | --- | --- |
| **Element** | **Comment** | **Action / Update** | **Updated On** |
| Welcome Copy | Only “**Jack**” (the first name) should be in boldface, not “**Hello Jack,**” (remove the boldface from “Hello…”) | Remove boldface |  |
| Instructional Text | Ensure that the text on this screen “You have not yet created a Mover Update Terms of Use” *only* applies to when there is no Terms of Use ID listed; in this HTML screen, there is a Terms of Use ID listed. Therefore, ensure that the instructional text reads: “Select an ID to view your NCOA Terms of Use.” | Update instructional text for all iterations w/ ToU IDs |  |
| Validate… accordion section header | The Service Bureau accordion header in the HTML currently reads “Validate Terms of Use” but it should be “Validate Client Terms of Use ID” as seen here: <http://xewp8t.axshare.com/#p=ncoa_dashboard__validate_client_terms_of_use_id__s> | Change the accordion header |  |
| \* some exceptions may apply | Shouldn’t the italicized “*\** *some exceptions may apply*” text be right-justified as it is elsewhere in the HTML? Right now on the HTML it is underneath the “ID not found?” paragraph. | Right-justify exceptions text |  |
| The Start Entering ID hint text | Confused why the hint text, “e.g. EU123456789” is not positioned within the field? It just looks weird to have the field label be: “Start entering ID eg: EU123456789”; the field should have the distinct label “**Start entering ID:**” as boldface text without the hint text. | Insert hint text in field, not field label |  |
| The table columns “Status” and “Expiry Date” | Both in the Copy Deck and the wireframe prototype, the field column headers are “Terms of Use ID”, “Status” and Expiry Date”. This is to mimic the report output: <http://xewp8t.axshare.com/ncoa_dashboard__download_all_terms_of_use__service.html> -- but in the HTML the order is “Terms of Use ID”, “Expiry Date” and “Status”, which is not the correct order. The correct order is “Terms of Use ID”, “Status” and then “Expiry Date”. | Rebuild the table to swap the 2 column headers |  |

Also, Aaron, ensure that the French email template (especially the footer) <**EmailTemplate\_FR**> matches in terms of all modules, text and CTA links to the English template. I’m not proficient in French but this HTML page does not look like it matches 1-to-1, especially the sliver that begins with “**Trouver en bureau de poste**” – which should be deleted.