

MARQUIS

DMX345	DocuMatix On Demand Triggered Emails
Order of Steps	Tasks
Triggered Emails must be created within Email Manager. To find procedures for creating the email, please refer to the Building a Triggered Email procedures	
Step 1	Log into DocuMatix
	The Email must be published, so navigate to Email Manager to publish any unpublished Trigger Emails
Step 2	Click on the " DocuMatix Product Suite " ribbon located in the menu on the left-hand side of the page
Step 3	Click the drop-down arrow in the box stating "All Email Types"
Step 4	Click Triggered
Step 5	Within the list of Trigger emails, click on the desired email
Step 6	Click Publish
	If any concerns are found, a Validate Email window will display them
Step 7	Take any action to correct
Step 8	Click Next
Step 9	Click Submit (this will no longer be present in future updates)
Step 10	Click Yes
Step 11	Click on the " DocuMatix On Demand " ribbon located in the menu on the left-hand side of the page
Step 12	Click Triggered Emails
Step 13	Any Triggered emails displaying here are available to be set up for automation within the DocuMatix Configuration Tool.
To automate the Trigger Email, you'll need to continue with the DocuMatix Configuration Tool. Please reference the Configuration Tool procedures for a step by step guide of the process.	