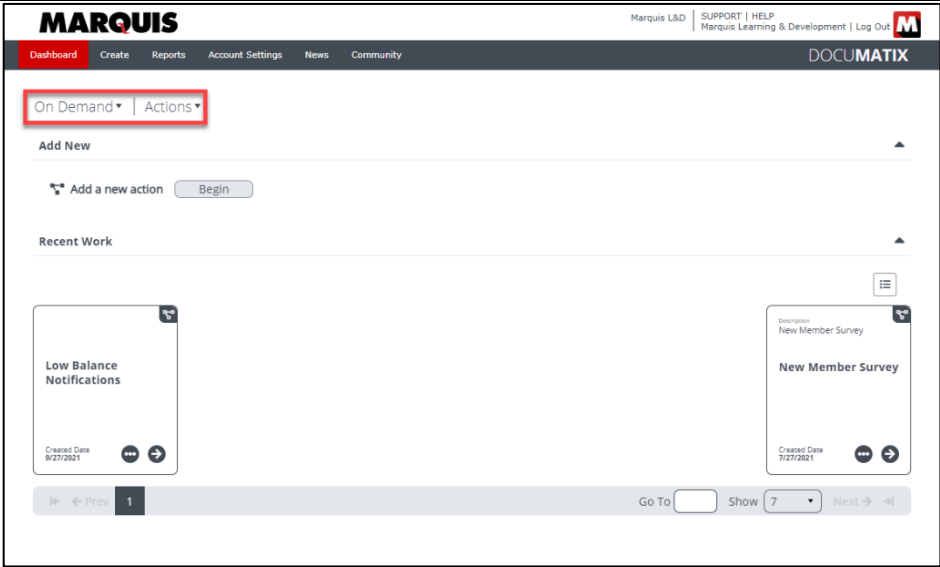
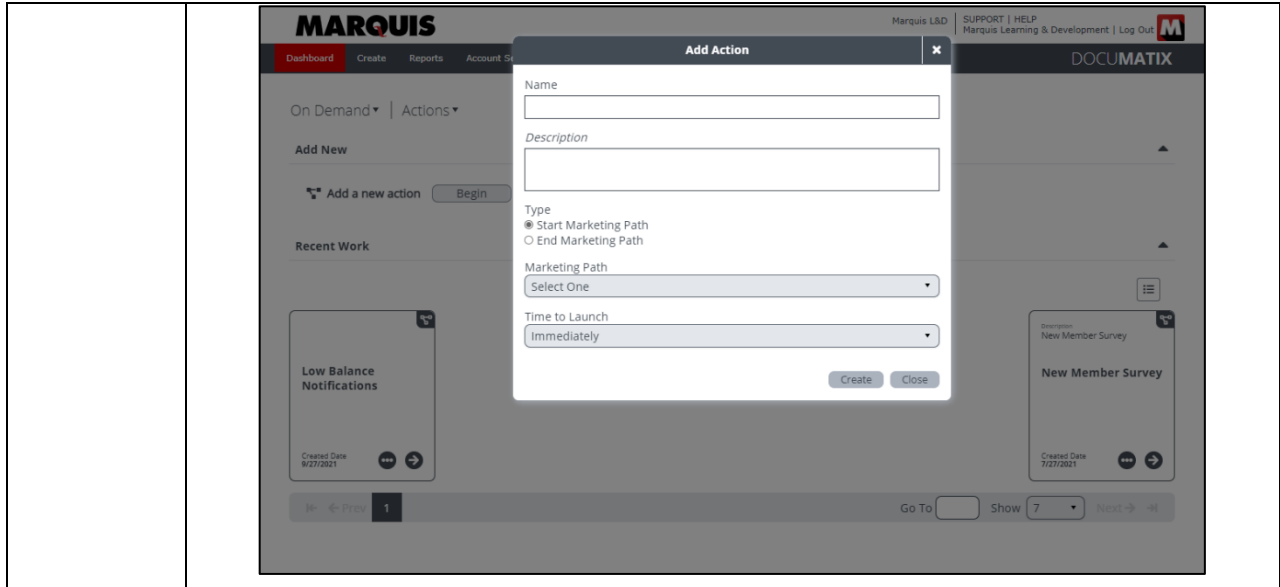




MARQUIS

DMX345	DocuMatix On Demand Actions
<p>An Action is the automation of a Marketing Path. The emails and Marketing Paths must be set up prior to adding an Action within DocuMatix On Demand. If the Marketing Path has not been setup, please refer to the DMX324 Building a Marketing Path document for step-by-step procedures.</p>	
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Use the product drop-down and select On Demand
Step 3	Use the module drop-down arrow and select Actions
	 <p>The screenshot shows the Marquis DocuMatix dashboard. At the top, there is a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The 'On Demand' and 'Actions' dropdown menus are highlighted with a red box. Below this, there is an 'Add New' section with a 'Begin' button. The 'Recent Work' section displays two cards: 'Low Balance Notifications' and 'New Member Survey', each with a 'Created Date' and navigation arrows.</p>
Step 4	Click Begin to add a new action
Step 5	Type in an Action Name
Step 6	Type in a Description (optional)
Step 7	Select a Type
Step 8	Click the drop-down arrow for Marketing Path
8.1	Click on the desired path from within the list
Step 9	Click the drop-down arrow for Time to Launch
9.1	Select the desired days or leave it defaulted to Immediately
Step 10	Click Save

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To automate the Action, 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.

Step 11	To edit an Action, click the Options icon  on the desired action card
11.1	Click Edit
11.2	Make the desired changes to the Name, Description or Type
11.3	Click Update to save changes
Step 12	To delete an Action, click the Options icon  on the desired action card
12.1	Click Delete
12.2	Type DELETE into the confirmation box
12.3	Click Yes

