

MARQUIS

DMX345 DocuMatix On Demand Marketing Automation

Order of Steps Tasks

Step 1 Create a flow chart to determine the campaigns and rules for each campaign as well as what data fields will be needed in the extract.

XYZ Client EXAMPLE 1
Versions for DOD Emails

Description	Code	Subject Line	Rule 1	Rule 2	Rule 3	Rule 4
Onboarding Welcome/eServices	A		1 day from open date	age 18+		
Onboarding Checking	B		7 days from open date	age 18+	no checking	
Onboarding Credit Card	C		14 days from open date	age 18+	no credit card	
Onboarding Auto Loans	D		30 days from open date	age 18+	no auto loans	
Onboarding Mortgage						
Onboarding Investment/Savings						
Reboarding Thank You						
Reboarding Checking						
Reboarding Credit Card						
Reboarding Auto Loans						
Reboarding Mortgage						
Reboarding Investment/Savings						

Step 2 Log into **DocuMatix**

Step 3 Click on the **“DocuMatix on Demand”** ribbon located in the menu on the left-hand side of the page

Step 4 Click on **“Marketing Automation”** located in the menu

Step 5 Click the green **“Add New”** button in the upper right-hand side of the page

Step 6 Type in a **name** for the Marketing Campaign

Step 7 Select a **field** to track on

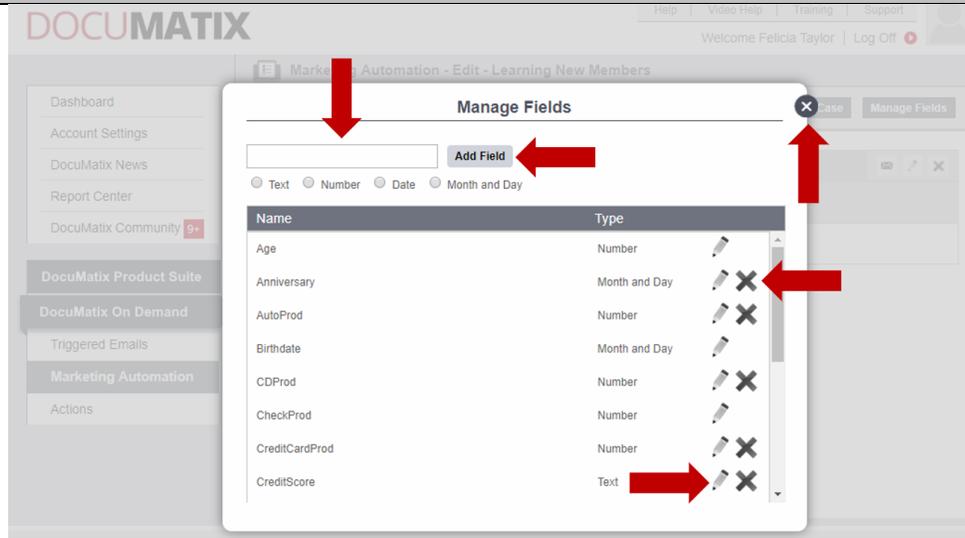
Note: The tracking field is used to count how many times a record receives an offer. By default, email address is available. If something different will be used, Custom must be selected.

Step 8 Click **“Create”**

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Step 9	Click "Manage Fields" in the upper right-hand side of the page
Step 10	To add a field, click in the box and type a name
Step 11	Select the format of the field being added: Text, Number, Date, Month and Day
Step 12	Click the "Add Field" button to add it to the list
Step 13	To remove a field from the list, click the "X" next to a specific field and select "Yes"
Step 14	To edit a field from the list, click the "X" next to a specific field, make the necessary changes and click "OK"

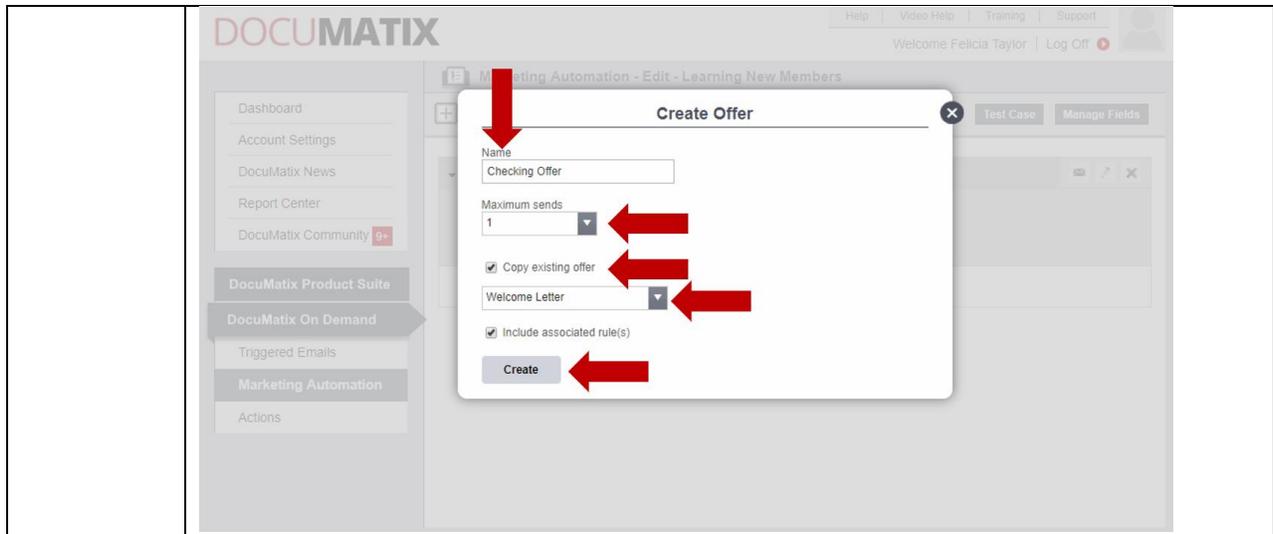
Note: The fields must be managed to ensure the proper fields are in place for any rules to be applied to the campaigns.



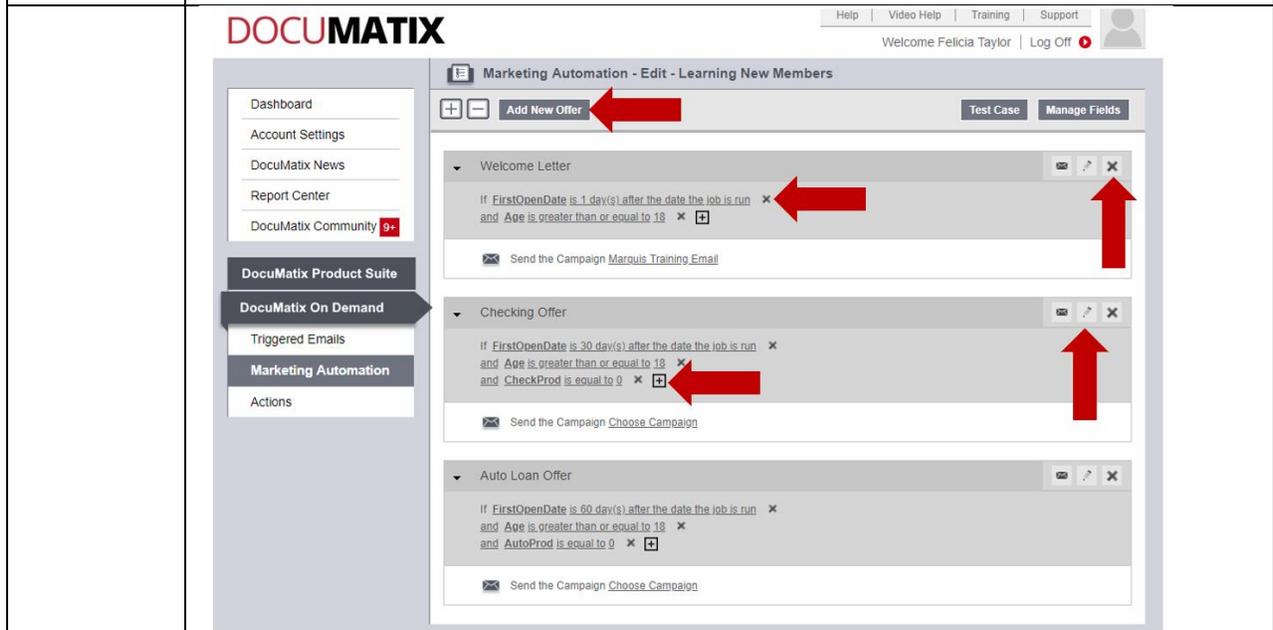
Step 15	Click "Add New Offer"
Step 16	Type in the offer name
Step 17	Click the drop-down arrow to choose the "Maximum Sends"
Step 18	Click "Create"
Step 19	The default rule will be to "Send to everyone once"
Step 20	To modify the rule, click on "Send to everyone once"
Step 21	Select a "field" from the list for the rule to be applied to
Step 22	Click "Next"
Step 23	Select an "Operator"
Step 24	Click "Next"
Step 25	Choose the "Value"
Step 26	Click "Finish"
Step 27	To add another rule, click the "plus symbol" and repeat the previous steps
	Once all rules are in place, the next offer can be added
Step 28	Click "Add New Offer"
Step 29	Type in the offer "name"
Step 30	Click the drop-down arrow to choose the "Maximum Sends"
Step 31	Click "Create"
Step 32	Repeat Steps 20 - 26

Note: If the rules or setup from a previous offer in the Decision Tree can be used, click the Copy box. This will allow for a faster setup process. Any changes can be made after the copy is created.

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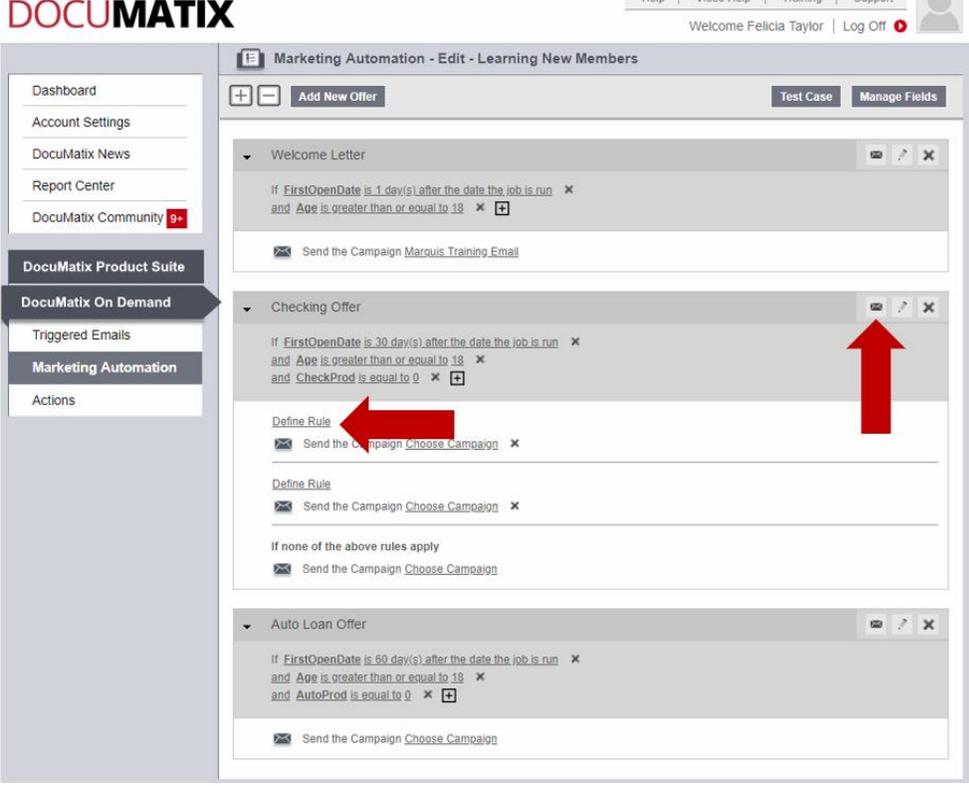


- Step 33** To remove a rule, click on the “X” to the right of the rule
- Step 34** Click “Yes” to complete the removal process
- Step 35** To remove an offer, click the “X” located to the far right of the offer box
- Step 36** Click “Yes” to complete the removal process
- Step 37** To edit the offer settings, click the “pencil” button to the far right of the offer box
- Step 38** Click “Update”



- Once all offers are setup, the **campaign** needs to be selected
- Step 39** Within each offer, click “**Select Campaign**”
- Step 40** Click “**Select Triggered Email**”
- Step 41** Click the **drop-down arrow** and click on an email from the list
- Step 42** Click “**Ok**”
- Step 43** To add more **campaigns** to the offer, click the **envelope** button to the far right of the offer box

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Step 44	If a rule option is available, a Define Rule item will appear
Step 45	Click “Define Rule” to set it up following Steps 20-26
	 <p>The screenshot displays the DocuMatix Marketing Automation interface. On the left is a sidebar with navigation options: Dashboard, Account Settings, DocuMatix News, Report Center, DocuMatix Community, DocuMatix Product Suite, DocuMatix On Demand (highlighted), Triggered Emails, Marketing Automation, and Actions. The main content area is titled 'Marketing Automation - Edit - Learning New Members'. It features a decision tree with three main branches: 'Welcome Letter', 'Checking Offer', and 'Auto Loan Offer'. The 'Checking Offer' branch is expanded, showing a 'Define Rule' option with a red arrow pointing to it. Another red arrow points to the 'Define Rule' text in the 'Checking Offer' branch. The 'Welcome Letter' branch has a condition: 'If FirstOpenDate is 1 day(s) after the date the job is run and Age is greater than or equal to 18'. The 'Auto Loan Offer' branch has a condition: 'If FirstOpenDate is 60 day(s) after the date the job is run and Age is greater than or equal to 18 and AutoProd is equal to 0'. Each branch includes an action: 'Send the Campaign Marquis Training Email' for Welcome Letter, and 'Send the Campaign Choose Campaign' for the other two.</p>
	Once setup is complete, the Marketing Path is ready to be Published
Step 46	Click on “Marketing Automation” located in the menu
Step 47	Click on the decision tree and select “Publish”
Step 48	Click “Yes”