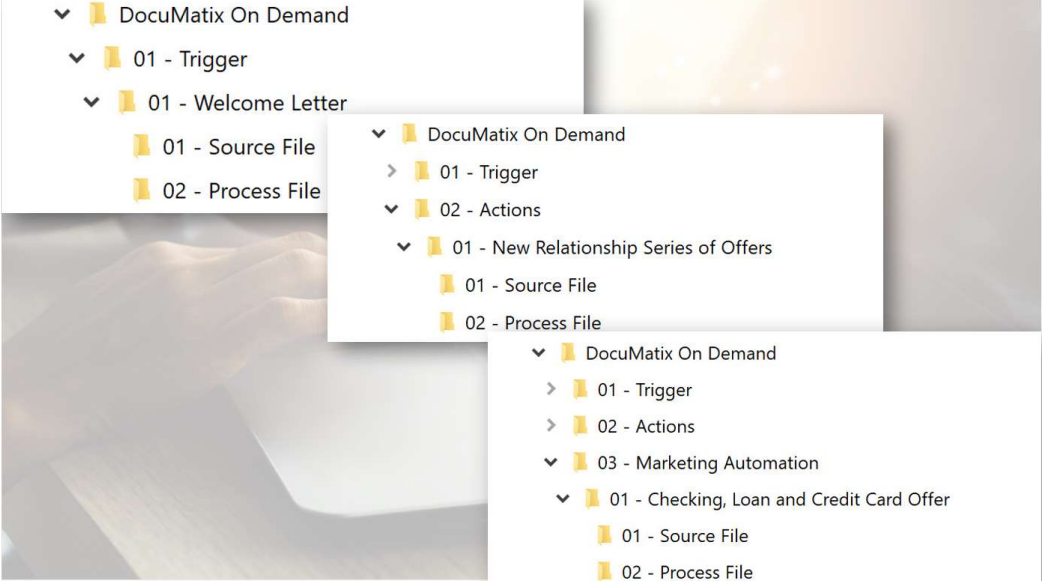


# MARQUIS

DMX347	Documatix on Demand Configuration Tool
Order of Steps	Tasks
Step 1	Launch the DocuMatix on Demand <b>configuration.exe</b>
Step 2	Click <b>Settings</b>
Step 3	Type in a <b>Default error notification email</b>
Step 4	Type in a <b>Default processed notification email</b>
Step 5	Click the drop-down arrow to select a <b>Time to keep logs</b>
Step 6	Click the drop-down arrow to select a <b>Time to keep corrupt files</b>
Step 7	Click the drop-down arrow to select the <b>Web service monitoring</b> option
Step 8	Fill out the <b>SMTP Mail Server</b> information
	<ul style="list-style-type: none"> <li>• Mail Server Name</li> </ul>
	<ul style="list-style-type: none"> <li>• From email address</li> </ul>
	<ul style="list-style-type: none"> <li>• TCP port</li> </ul>
	<ul style="list-style-type: none"> <li>• Username</li> </ul>
	<ul style="list-style-type: none"> <li>• Password</li> </ul>
	<ul style="list-style-type: none"> <li>• Test email address</li> </ul>
Step 9	Click the <b>“Test mail server”</b> to test the mail server settings
Step 10	Click <b>“Save”</b>
Step 11	Click <b>“Back”</b> to get back to the main <b>Configuration page</b>
	<p>The screenshot displays the 'Settings' page of the DocuMatix On Demand Configuration Tool. The page includes a 'Back' button, two email notification fields (both set to 'learning@gomarquis.com'), and dropdown menus for 'Time to keep logs' (12 Months) and 'Time to keep corrupt files' (9 Months). The 'Web service monitoring' option is set to 'Allow DocuMatix to monitor'. The 'SMTP Mail Server' section contains fields for 'Mail server name', 'From email address' (noreply@documatix.com), 'TCP port' (25), 'Username', 'Password', and 'Test email address' (learning@gomarquis.com). A 'Test mail server' button is located at the bottom right of this section. A 'Save' button is positioned at the bottom left of the page. Red arrows highlight the 'Back' button, the two email fields, the 'SMTP Mail Server' section, the 'Test mail server' button, and the 'Save' button.</p>
<p>There is a required folder structure needed to ensure the automations operate successfully. There will be a DocuMatix on Demand folder and within that folder will be folders for each mail type: Trigger, Action, and Marketing Automation. Within those folders there will be two folders: Source File and Process File.</p>	

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	 <p>The screenshot shows a hierarchical folder structure in DocuMatix On Demand. The main folder is 'DocuMatix On Demand', which contains a sub-folder '01 - Trigger'. Inside '01 - Trigger' is another sub-folder '01 - Welcome Letter', which contains '01 - Source File' and '02 - Process File'. Other visible folders include '02 - Actions' and '03 - Marketing Automation', with '01 - New Relationship Series of Offers' nested under '02 - Actions'.</p>
<b>Step 12</b>	Create the folders
12.1	The file that will be uploaded to DocuMatix will be placed in the <b>Source File</b> folder
12.2	DocuMatix will move the file from the Source folder into the <b>Process File</b> folder once it begins processing the file for the campaign
<b>Note:</b> The file being created must be a CSV formatted file.	
To configure <b>Triggered Emails/Texts</b> , continue with <b>Step 13</b> . To configure <b>Actions</b> , move to <b>Step 29</b> . To configure <b>Marketing Automations</b> , move to <b>Step 44</b>	
<b>Step 13</b>	From the main Configuration Tool menu, click " <b>Triggered Emails</b> "
<b>Step 14</b>	Click " <b>Add New</b> "
<b>Step 15</b>	Click the drop-down arrow to select a <b>Triggered email</b>
<b>Step 16</b>	Click <b>browse</b> to select the <b>Source Folder</b>
<b>Step 17</b>	Click <b>browse</b> to select the <b>Processing Folder</b>
<b>Step 18</b>	Click <b>Configure</b>
<b>Step 19</b>	Click <b>Browse</b> to select the Source file so the tool can configure the headers and fields
<b>Step 20</b>	<b>Verify</b> the field headers are the correct fields for the Trigger Email
<b>Step 21</b>	Click <b>Ok</b>
<b>Step 22</b>	Click the drop-down arrow to select the <b>Email address</b> field
<b>Step 23</b>	Click the drop-down arrow to select the <b>Mobile number</b> field (optional)
<b>Step 24</b>	Click the drop-down arrow to select any <b>Custom fields</b> (optional)
<b>Step 25</b>	If any fields are listed in the <b>Merge Fields</b> box, click the drop-down arrow to map to the appropriate field in the source file
<b>Step 26</b>	Click " <b>Save</b> "
<b>Step 27</b>	Click " <b>Back</b> " to get back to the main <b>Configuration page</b>

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DocuMatix On Demand Configuration Tool

**Add Triggered Email**

Back

Triggered email: Happy Birthday 18+

Source folder: C:\DoD\Triggered Emails\Happy Bday\Source

Processing folder: C:\DoD\Triggered Emails\Happy Bday\Processing

CSV header row: email,name

Buttons: Browse... (Source folder), Browse... (Processing folder), Configure...

Fields:

- Email: email
- Mobile number: (optional)
- Custom field 1: (optional)
- Custom field 2: (optional)

Merge Fields (1 / 1 mapped)

First Name: name

Save

<b>Step 28</b>	<b>Restart</b> the DocuMatix On Demand service after any changes
	To configure <b>Actions</b> continue with <b>Step 29</b> . To configure <b>Marketing Automations</b> , move to <b>Step 44</b>
<b>Step 29</b>	From the main Configuration Tool menu, click " <b>Actions</b> "
<b>Step 30</b>	Click " <b>Add New</b> "
<b>Step 31</b>	Click the drop-down arrow to select a <b>Action</b>
<b>Step 32</b>	Click <b>browse</b> to select a <b>Source Folder</b>
<b>Step 33</b>	Click <b>browse</b> to select a <b>Processing Folder</b>
<b>Step 34</b>	Click <b>Configure</b>
<b>Step 35</b>	Click <b>Browse</b> to select the Source file so the tool can configure the headers and fields
<b>Step 36</b>	<b>Verify</b> the field headers are the correct fields for the Action Email
<b>Step 37</b>	Click <b>Ok</b>
<b>Step 38</b>	Click the drop-down arrow to select the <b>Email address</b> field
<b>Step 39</b>	Click the drop-down arrow to select any <b>Custom fields</b> (optional)
<b>Step 40</b>	If any fields are listed in the <b>Merge Fields</b> box, click the drop-down arrow to map to the appropriate field in the source file
<b>Step 41</b>	Click " <b>Save</b> "
<b>Step 42</b>	Click " <b>Back</b> " to get back to the main <b>Configuration page</b>

# MARQUIS

The screenshot shows the 'Add Action' configuration window in the DocuMatix On Demand Configuration Tool. The window title is 'DocuMatix On Demand Configuration Tool'. The main heading is 'Add Action'. Below this, there is a 'Back' button. The configuration fields are as follows:

- Action:** DOD Training Mktng Path
- Source folder:** C:\DoD\Action\Learning and Dev Path\Source
- Processing folder:** C:\DoD\Action\Learning and Dev Path\Processing
- CSV header row:** email,name,Age,Address,City,state,zip,1stopen,1stopen,checking,auto,cd,home,delinquent
- Email:** email
- Custom field 1:** (optional)
- Custom field 2:** (optional)

A 'Merge Fields ( 2 / 2 mapped )' dialog is open, showing the following fields:

- email: email
- name: name

Buttons visible include 'Browse...' (two), 'Configure...', and 'Save'. Red arrows indicate the sequence of steps: clicking the 'Action' dropdown, clicking 'Browse...' for source and processing folders, clicking 'Configure...', clicking the 'Merge Fields' dialog, and finally clicking 'Save'.

<b>Step 43</b>	<b>Restart</b> the DocuMatix On Demand service after any changes
	To configure <b>Marketing Automations</b> , move to the next step.
<b>Step 44</b>	From the main Configuration Tool menu, click " <b>Marketing Automation</b> "
<b>Step 45</b>	Click " <b>Add New</b> "
<b>Step 46</b>	Click the drop-down arrow to select a <b>Campaign</b>
<b>Step 47</b>	Click <b>browse</b> to select a <b>Source Folder</b>
<b>Step 48</b>	Click <b>browse</b> to select a <b>Processing Folder</b>
<b>Step 49</b>	Click <b>Configure</b>
<b>Step 50</b>	Click <b>Browse</b> to select the Source file so the tool can configure the headers and fields
<b>Step 51</b>	<b>Verify</b> the field headers are the correct fields for the Marketing Automation Email
<b>Step 52</b>	Click <b>Ok</b>
<b>Step 53</b>	Click the drop-down arrow to select the <b>Email address</b> field
<b>Step 54</b>	Click " <b>Save</b> "

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DocuMatix On Demand Configuration Tool

**Edit Marketing Automation Campaign**

Back

Campaign Name: Onboarding Program

Source folder: C:\DoD\Mktg Automation\Onboarding\Source

Processing folder: C:\DoD\Mktg Automation\Onboarding\Processing

CSV header row: email.name, Age, Address, City, state, zip, 1stopen, 1stopen, checking, auto, cd, home, delinquent

Email address: email

**Step 55** Back in the Marketing Automation window, click on the red 0/1 under the **Fields** header

**Step 56** Click the **drop - down arrow** next to each field

**Step 57** Select the header that best matches the field name

**Step 58** Once all fields are mapped, click **Save**

DocuMatix On Demand Configuration Tool

**Marketing Automation**

Name	Updated	Mapping Status	Fields	Campaigns
Onboarding Program	1/25/2019	Incomplete	0/1	0/1

Marketing automation ID: 1740  
Company ID: Lear0  
Source folder: C:\DoD\Mktg Auto  
Processing folder: C:\DoD\Mktg Auto  
CSV fields: email, name, Ag

Email address: email  
Fields mapped: 0 of 1  
Campaigns mapped: 0 of 1

**Field Mappings for Onboarding Program**

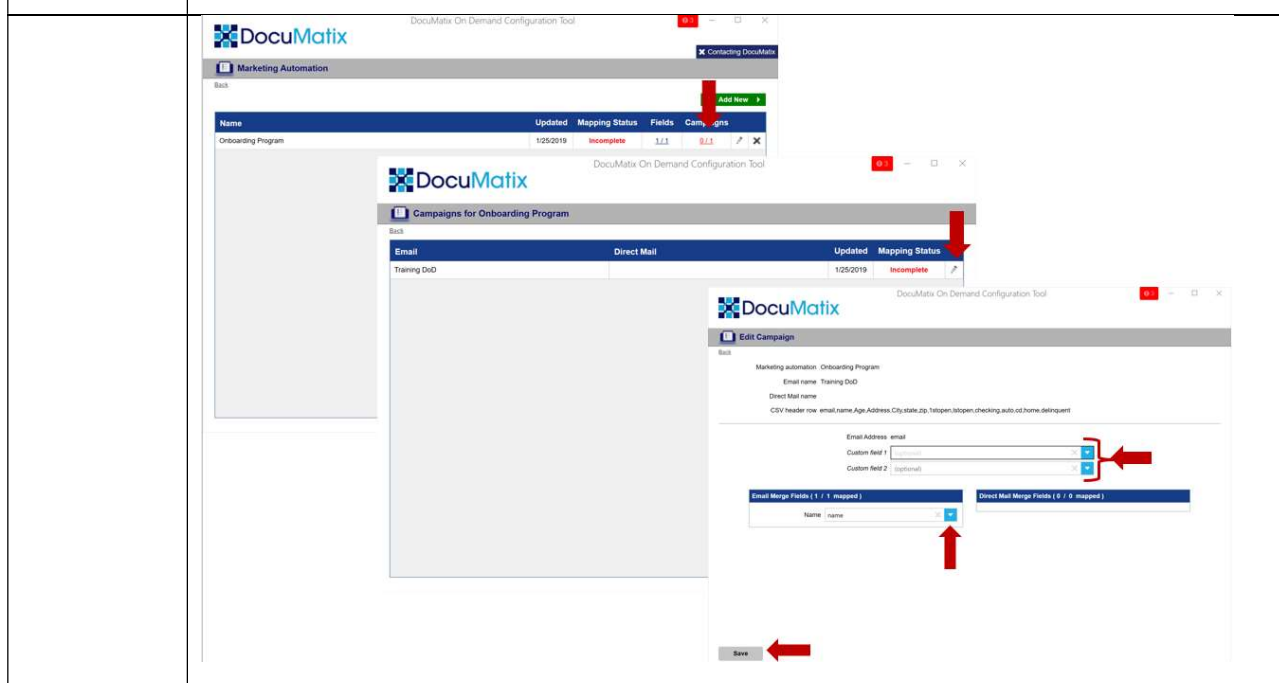
Marketing Automation Fields: 0 of 1 Mapped

age

email  
name  
Age  
Address  
City  
state  
zip  
1stopen  
1stopen  
checking  
auto  
cd  
home  
delinquent

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- Step 59** Back in the Marketing Automation window, click on the red 0/1 under the **Campaigns** header
- Step 60** Click the **edit** button (pencil)
- Step 61** Click the drop-down arrow to select any **Custom fields** (optional)
- Step 62** If any fields are listed in the **Merge Fields** box, click the drop-down arrow to map to the appropriate field in the source file
- Step 63** Click **Save**



- Step 64** Mapping Status should now display **Complete**
- Step 65** Click **Back**
- The Fields and Campaigns items should no longer be in red

- Step 66** **Restart** the DocuMatix On Demand service after any changes

