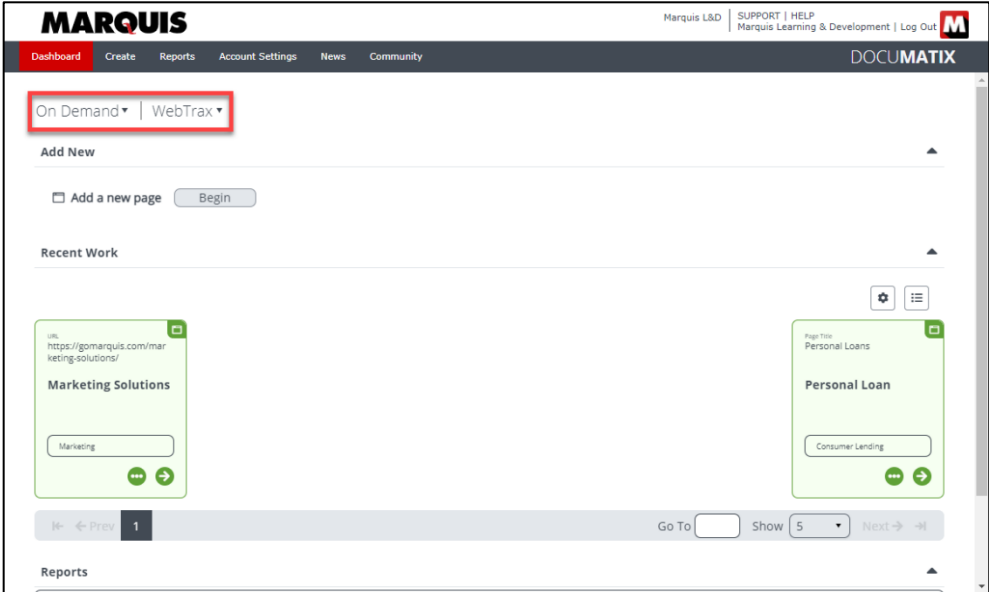

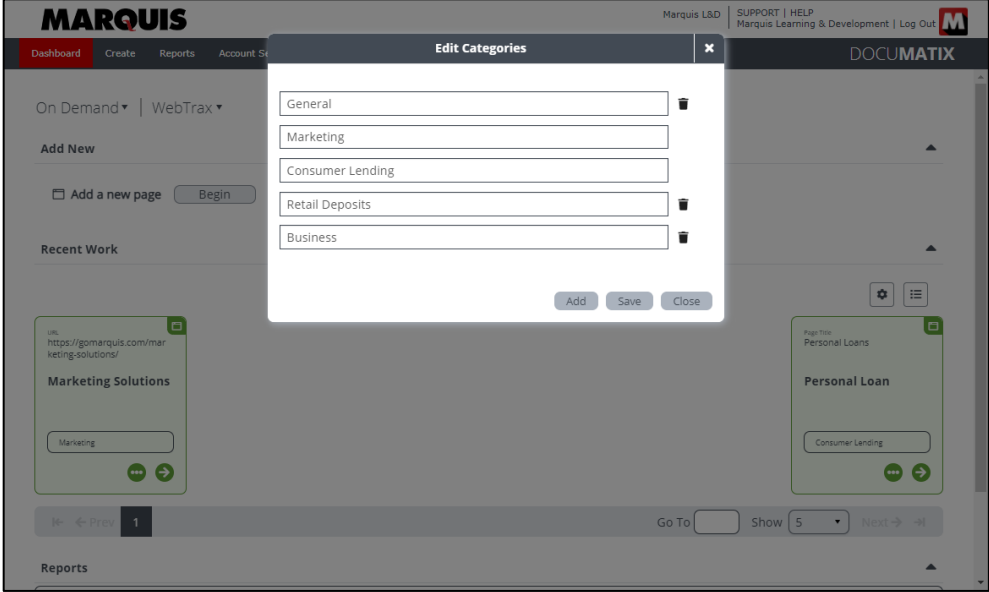

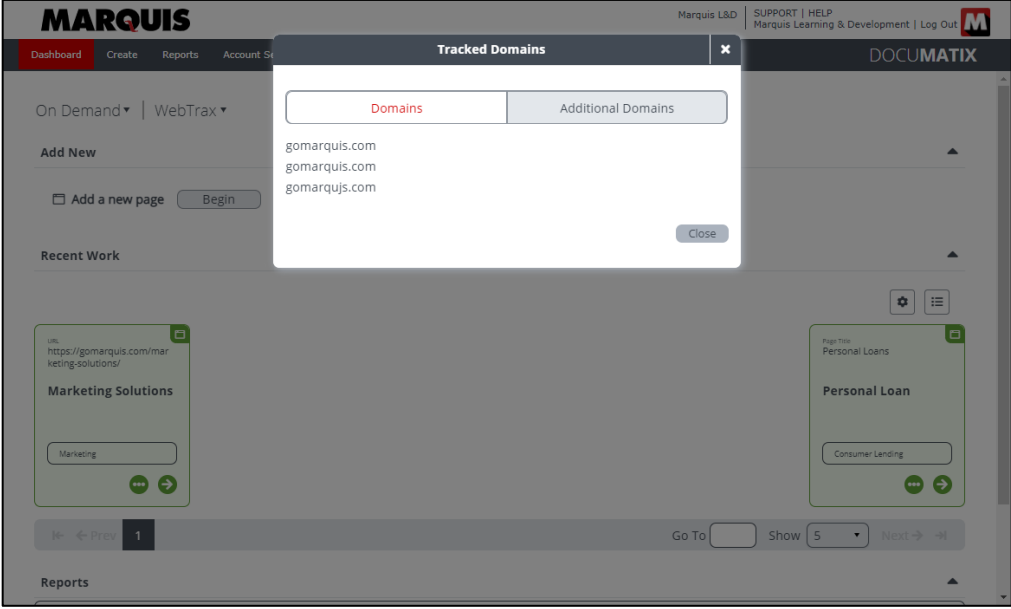



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DMX350	DocuMatix On Demand WebTrax Setup
<p>This procedure will cover how to setup the pages to be tracked within WebTrax. It is important to setup the WebTrax page tracking prior to activating or establishing the Marketing Automation process. This allows WebTrax to use the embedded links in email campaigns and once the customer clicks the link, they're identified, and tracked. Please note, WebTrax is limited to only one Marketing Account and cannot be applied to multiple DocuMatix accounts.</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 and select WebTrax
	 <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 'WebTrax' dropdown menus are highlighted with red boxes. Below the navigation bar, there is an 'Add New' section with an 'Add a new page' button and a 'Begin' button. The 'Recent Work' section displays two cards: 'Marketing Solutions' and 'Personal Loan'. The 'Marketing Solutions' card has a 'Marketing' input field and a green arrow button. The 'Personal Loan' card has a 'Consumer Lending' input field and a green arrow button. At the bottom, there is a pagination bar with 'Go To', 'Show 5', and 'Next' buttons.</p>
Step 4	Click the WebTrax Settings and Reports button 
Step 5	Click Edit Categories
<p>Note: Categories are used for grouping pages being tracked and will be referenced when setting up the decisions for the marketing automation.</p>	
Step 6	Click in a box to edit the category description
Step 7	Click Add to create a new category
Step 8	Click Save once the categories are named as desired
8.1	Click Yes to the confirmation message
Step 9	To delete a category, click the trashcan icon located to the right of the name
Step 10	Click Save
10.1	Click Yes to the confirmation message

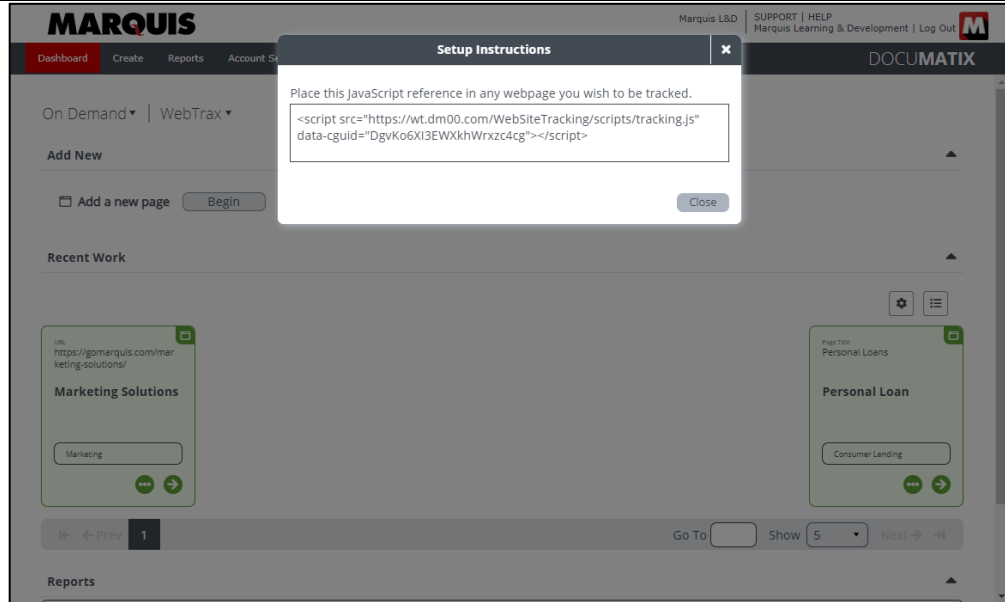
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Step 11	Click the WebTrax Settings and Reports button 
Step 12	Click Edit Tracked Domains
	A list of Domains will be listed that are currently being tracked
Step 13	Click Additional Domains to add more domains to track (optional)
13.1	Type in the domain in the box
13.2	Click Save
13.3	Click Yes to the confirmation message
Step 14	To delete an Additional Domain, click the trashcan icon located to the right of the domain
14.1	Click Save
14.2	Click Yes to the confirmation message
	
Step 15	Click the WebTrax Settings and Reports button 

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Step 16 Click **Setup Instructions**

This script is institution specific based on the domain rather than page specific so a simple copy and paste on the website would work best to allow the updating or removing. Best practice is to place the JavaScript in the header of the website.



Step 17 To add a new page, click **Begin**

17.1 Type in a **Name**

17.2 Click the drop-down arrow to select a **Category**

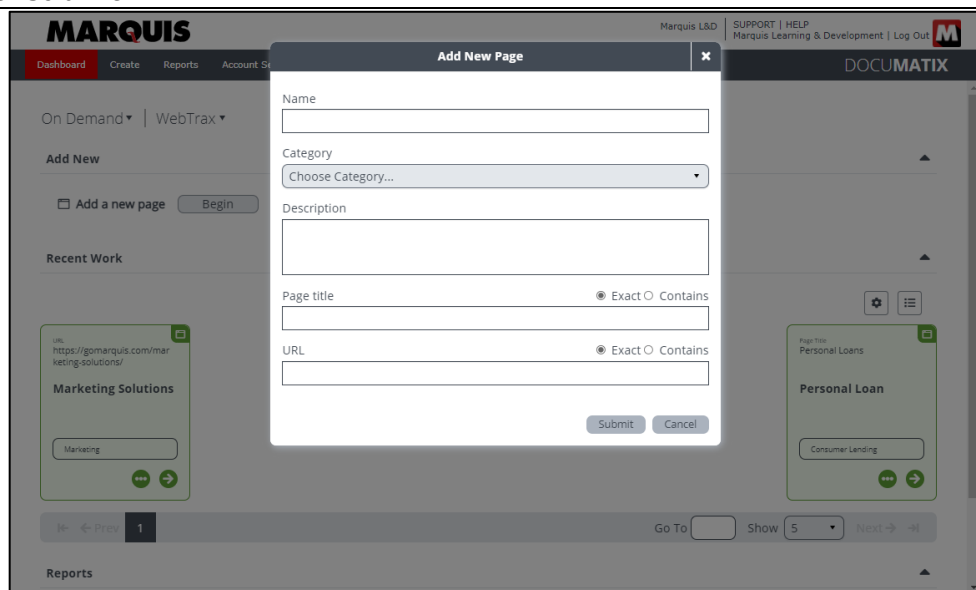
17.3 Type in a **Description**

17.4 Type in a **Page title** and select the preference of **Exact** or **Contains**

17.5 Type in a **URL** and select the preference of **Exact** or **Contains**

Note: Only enter in one selection: either the Page Title or the URL but not both.

Step 18 Click **Submit**



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