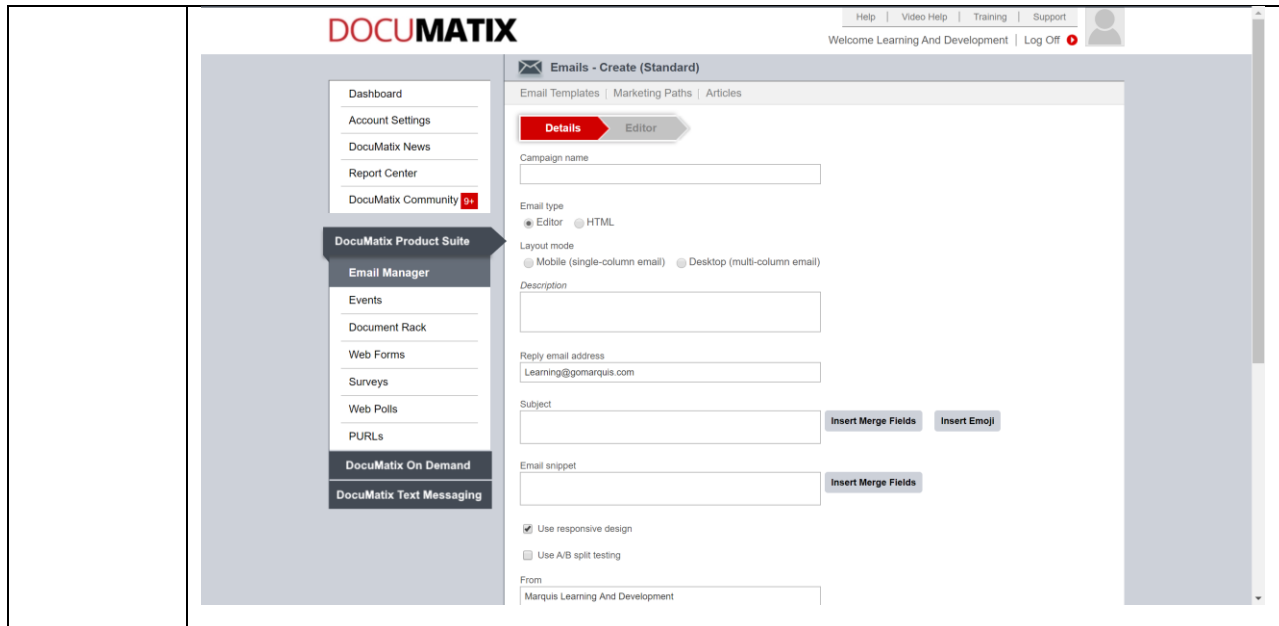














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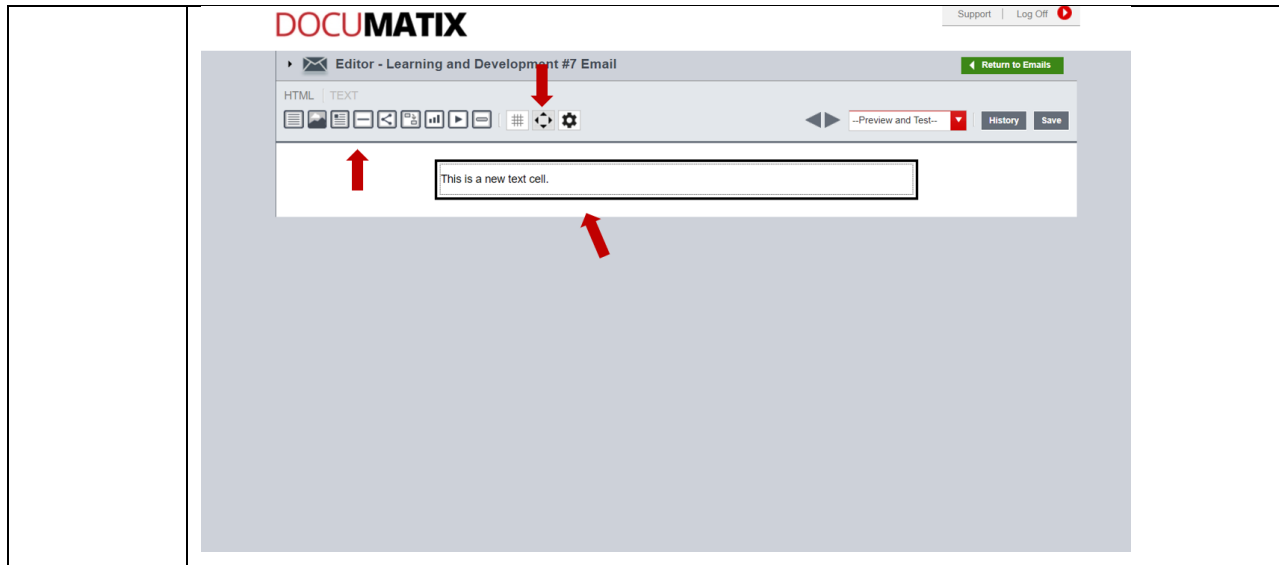
DMX301	Creating an Email from Scratch
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Click on “Email Manager” on left side of the menu
Step 3	Click on the green “Add New” button in the top right of the page
Step 4	Under Standard click on “Select”
Step 5	Complete or make modifications to the “Detail” page
Note: Anything in italics is an optional field as noted below. Some of the fields will auto populate from Account Settings.	
	<ul style="list-style-type: none"> • Campaign name
	<ul style="list-style-type: none"> • Email type
	<ul style="list-style-type: none"> • Layout Mode
Note: Mobile Layout Mode is for a single column email making it easier to view on a mobile device and Desktop Layout Mode allows for multi-column emails for viewing on a computer.	
	<ul style="list-style-type: none"> • Description (optional)
	<ul style="list-style-type: none"> • Reply email address
	<ul style="list-style-type: none"> • Subject, if needed “Insert Merge Fields” and “Insert Emoji”
	<ul style="list-style-type: none"> • Email snippet (optional), if desired “Insert Merge Fields”
	<ul style="list-style-type: none"> • Use responsive design
	<ul style="list-style-type: none"> • Auto Launch email (optional)
	<ul style="list-style-type: none"> • Use A/B split testing
	<ul style="list-style-type: none"> • From
	<ul style="list-style-type: none"> • Place in folder
5.1	Click on “Next”

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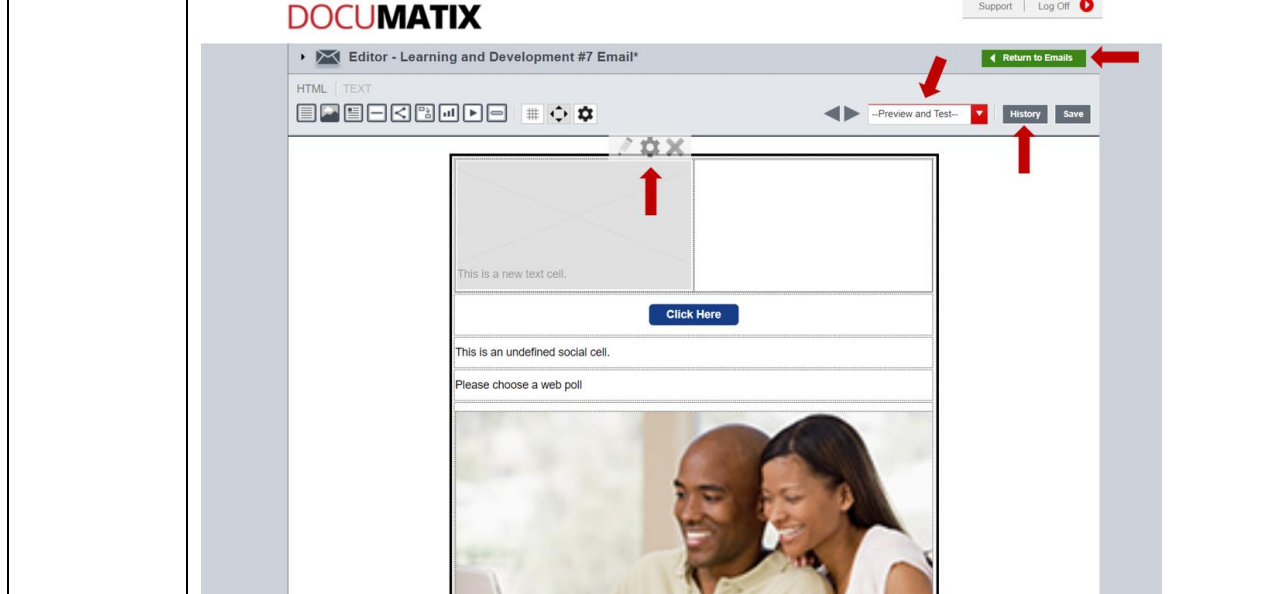


Step 6	Select an icon that corresponds to the function desired by “Click, Drag, and Drop” the icon into the body of the email being created
	<ul style="list-style-type: none"> •  Text
	<ul style="list-style-type: none"> •  Image
	<ul style="list-style-type: none"> •  Text and Image
<p>Note: When utilizing an IMAGE within the email, the Alt Text will need to contain text that describes what the image represents as it is used when emails are viewed through a viewing impaired app.</p>	
	<ul style="list-style-type: none"> •  Divider
	<ul style="list-style-type: none"> •  Social
	<ul style="list-style-type: none"> •  Copy Cell From Other Email
	<ul style="list-style-type: none"> •  Web Polling
	<ul style="list-style-type: none"> •  Video
	<ul style="list-style-type: none"> •  Button
6.1	Click and adjust email parameters as needed
	<ul style="list-style-type: none"> •  Grid Lines
	<ul style="list-style-type: none"> •  Resized
	<ul style="list-style-type: none"> •  Settings

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Step 7	Hover over each cell to Edit , change Settings , and Delete
	<ul style="list-style-type: none"> • Edit – This will allow the ability to add text to a text cell and add an image to an image cell. • Settings • Delete
Step 8	To select the preferred Preview and Test method, click the drop-down arrow for Preview and Test
Step 9	Click on the preferred testing Method
Step 10	If a misstep was made and the changes need to be reset, click on the History button
Step 11	Click the drop-down arrow for Select a Version
Step 12	Click on a version to verify the settings
Step 13	Once the desired version is found, click Revert To This Version
Step 14	The system autosaves every minute but we recommend clicking on “ Save ” on the right side of the menu bar
Step 15	Click the green button “ Return to Emails ” to right corner of the page



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Step 16	Within Email Manager , locate and click on the specific Email
Step 17	Select Schedule Launch
A Validate Email box will pop up. If any critical errors are found, they must be corrected before you can proceed. The critical errors will be flagged in red with directions on where to update or verify the settings.	
Step 18	If no critical errors are found, click Next
Step 19	A Schedule Launch box will appear. Complete the selections:
	<ul style="list-style-type: none"> • Launch Type <ul style="list-style-type: none"> ○ Standard Launch ○ Staggered Launch • Launch Date • Launch time • Time zone • Notification email address (optional) • Comments (optional) • Monthly Email Limit
Step 20	Click Next once all the selections are made
	The Community Reporting window will pop up. This is an optional setting to allow for the email example to be shared anonymously with the DocuMatix Community.
Step 21	Click the radial dial next to the Category to place the examples, otherwise leave it defaulted to None and click Next
If desired, there is an option to create a Push Report for the Email campaign which is an automated report sent to an email address or addresses based on a defined schedule. Move to the next step if that is something you would like to setup.	
Step 22	Click " Create Push Report "
22.1	Complete " Add Push Report " page
	<ul style="list-style-type: none"> • Report Type • Web Forms • Push report name • Email addresses • Push report start date • Push report expire date • Frequency • Days of the week • Time of the day
Step 23	Click " Submit "