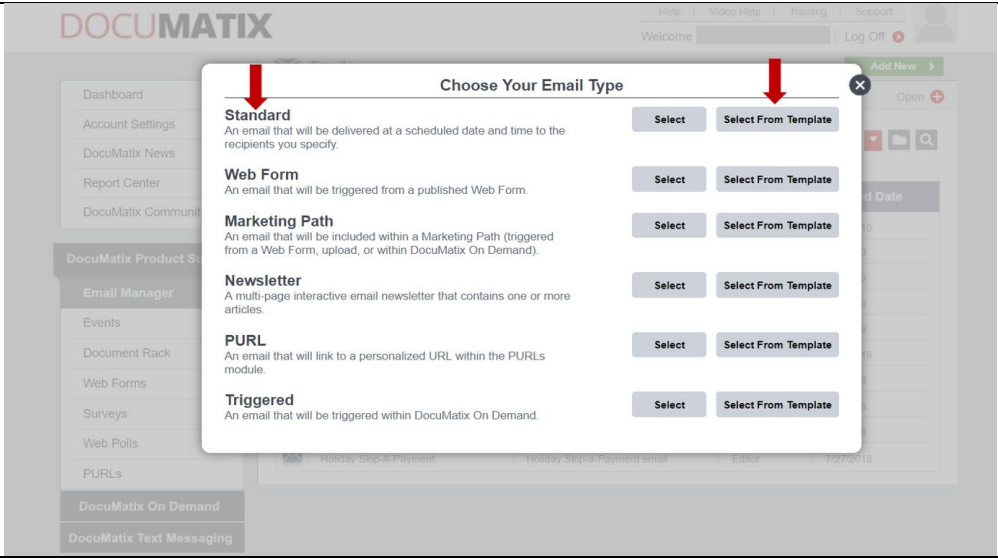
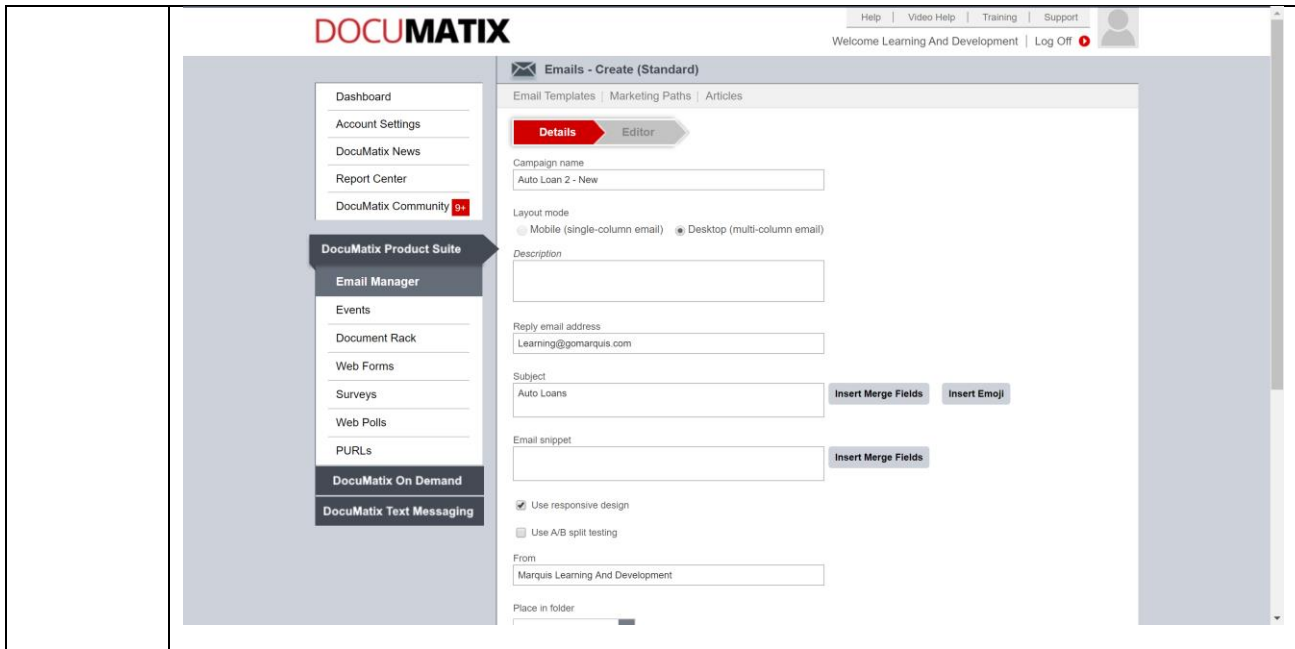

















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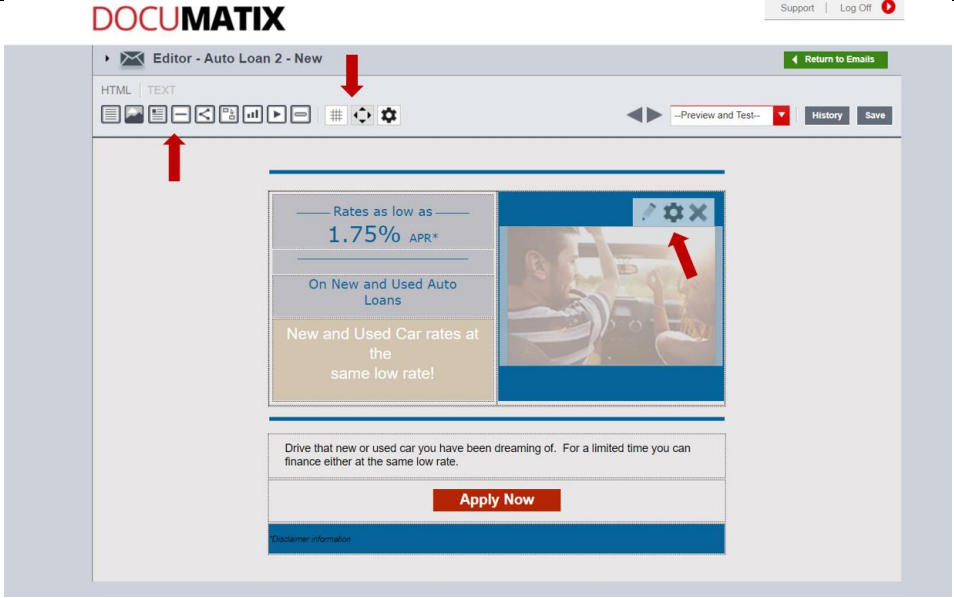
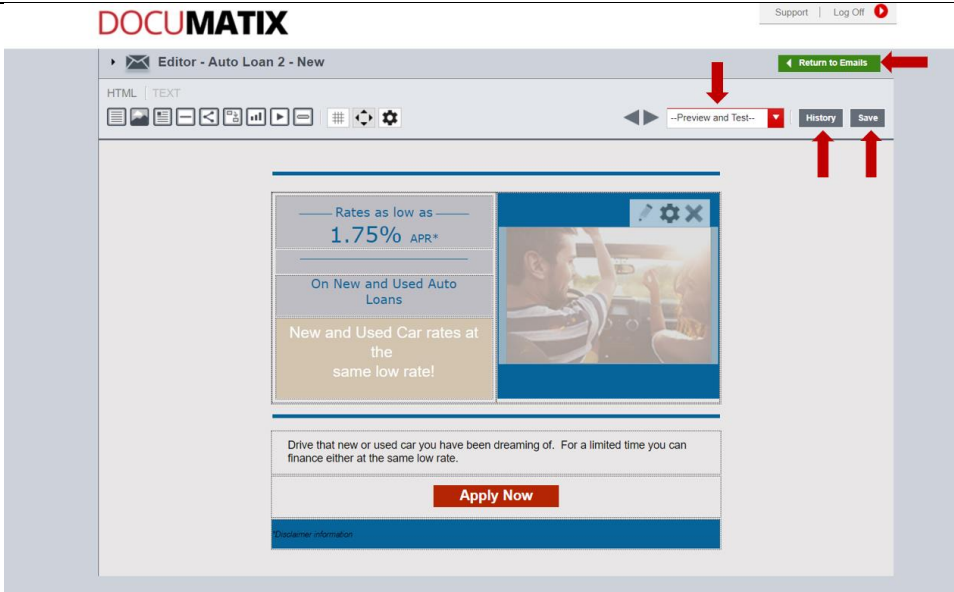
<b>DMX302</b>	<b>Creating an Email Using a Template</b>
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>DocuMatix</b>
<b>Step 2</b>	Click on <b>“Email Manager”</b> on left side of the menu
<b>Step 3</b>	Click on the green <b>“Add New”</b> button in the top right of the page
<b>Step 4</b>	Under Standard click on <b>“Select From Template”</b>
	
<b>Step 5</b>	Choose a Template box pops up, click on <b>“DocuMatix Templates”</b>
<b>Step 6</b>	Choose a template, by hovering over the selection and clicking on <b>“Select”</b>
<b>Step 7</b>	Complete or make modifications to the <b>“Detail”</b> page
<b>Note:</b> 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"> <li>• Campaign name</li> <li>• Layout Mode</li> </ul>
<b>Note:</b> 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"> <li>• Description (optional)</li> <li>• Reply email address</li> <li>• Subject, if needed <b>“Insert Merge Fields”</b> and <b>“Insert Emoji”</b></li> <li>• Email snippet (optional), if desired <b>“Insert Merge Fields”</b></li> <li>• Use responsive design</li> <li>• Auto Launch email (optional)</li> <li>• Use A/B split testing</li> <li>• From</li> <li>• Place in folder</li> </ul>
7.1	Click on <b>“Next”</b>

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<p><b>Step 8</b></p>	<p>To make changes to the content of the template, hover over each cell to <b>Edit</b>, change <b>Settings</b>, and <b>Delete</b></p>
	<ul style="list-style-type: none"> <li> Edit</li> </ul>
	<ul style="list-style-type: none"> <li> Settings</li> </ul>
	<ul style="list-style-type: none"> <li> Delete</li> </ul>
<p><b>Step 9</b></p>	<p>To make adjustments to the template structure just select an icon that corresponds to the function desired by “Click, Drag, and Drop” the icon into the body of the email being created. Existing cells can be rearranged using the “Click, Drag, and Drop” method.</p>
	<ul style="list-style-type: none"> <li> Text</li> </ul>
	<ul style="list-style-type: none"> <li> Image</li> </ul>
	<ul style="list-style-type: none"> <li> Text and Image</li> </ul>
<p><b>Note:</b> When utilizing an IMAGE within the email, the <b>Alt Text</b> 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"> <li> Divider</li> </ul>
	<ul style="list-style-type: none"> <li> Social</li> </ul>
	<ul style="list-style-type: none"> <li> Copy Cell From Other Email</li> </ul>
	<ul style="list-style-type: none"> <li> Web Polling</li> </ul>
	<ul style="list-style-type: none"> <li> Video</li> </ul>
	<ul style="list-style-type: none"> <li> Button</li> </ul>
<p>9.1</p>	<p>Click and adjust email paramiters as needed</p>
	<ul style="list-style-type: none"> <li> Grid Lines</li> </ul>
	<ul style="list-style-type: none"> <li> Resized</li> </ul>
	<ul style="list-style-type: none"> <li> Settings</li> </ul>

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<p><b>Step 10</b></p>	<p>To select the preferred Preview and Test method, click the <b>drop-down arrow</b> for <b>Preview and Test</b></p>
<p><b>Step 11</b></p>	<p>Click on the preferred testing Method</p>
<p><b>Step 12</b></p>	<p>If a misstep was made and the changes need to be reset, click on the <b>History</b> button</p>
<p><b>Step 13</b></p>	<p>Click the <b>drop-down arrow</b> for <b>Select a Version</b></p>
<p><b>Step 14</b></p>	<p>Click on a version to verify the settings</p>
<p><b>Step 15</b></p>	<p>Once the desired version is found, click <b>Revert To This Version</b></p>
<p><b>Step 16</b></p>	<p>The system autosaves every minute but we recommend clicking on <b>“Save”</b> on the right side of the menu bar</p>
<p><b>Step 17</b></p>	<p>Click the green button <b>“Return to Emails”</b> to right corner of the page</p>
	
<p><b>Step 18</b></p>	<p>Within <b>Email Manager</b>, locate and click on the specific Email</p>
<p><b>Step 19</b></p>	<p>Select <b>Schedule Launch</b></p>

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A <b>Validate Email</b> 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.	
<b>Step 20</b>	If no critical errors are found, click <b>Next</b>
<b>Step 21</b>	A <b>Schedule Launch</b> box will appear. Complete the selections:
	<ul style="list-style-type: none"> <li>• Launch Type <ul style="list-style-type: none"> <li>○ Standard Launch</li> <li>○ Staggered Launch</li> </ul> </li> <li>• Launch Date</li> <li>• Launch time</li> <li>• Time zone</li> <li>• Notification email address (optional)</li> <li>• Comments (optional)</li> <li>• Monthly Email Limit</li> </ul>
<b>Step 22</b>	Click <b>Next</b> once all the selections are made
	The <b>Community Reporting</b> window will pop up. This is an optional setting to allow for the email example to be shared anonymously with the DocuMatix Community.
<b>Step 23</b>	Click the radial dial next to the <b>Category</b> to place the examples, otherwise leave it defaulted to None and click <b>Next</b>
If desired, there is an option to create a <b>Push Report</b> 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.	
<b>Step 24</b>	Click " <b>Create Push Report</b> "
<b>Step 25</b>	Complete " <b>Add Push Report</b> " page
	<ul style="list-style-type: none"> <li>• Report Type</li> <li>• Web Forms</li> <li>• Push report name</li> <li>• Email addresses</li> <li>• Push report start date</li> <li>• Push report expire date</li> <li>• Frequency</li> <li>• Days of the week</li> <li>• Time of the day</li> </ul>
<b>Step 26</b>	Click " <b>Submit</b> "