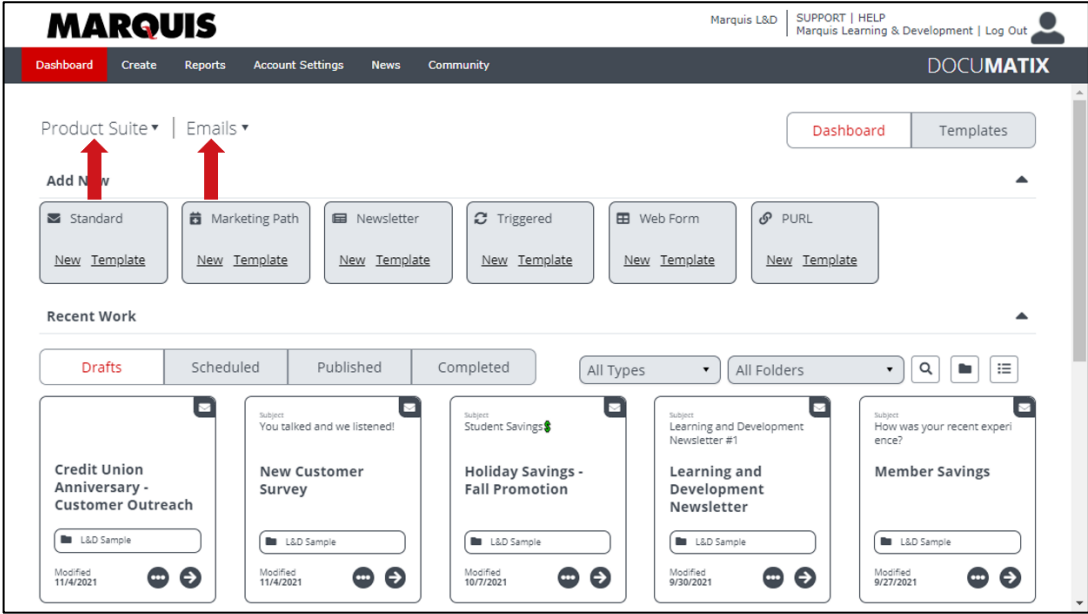

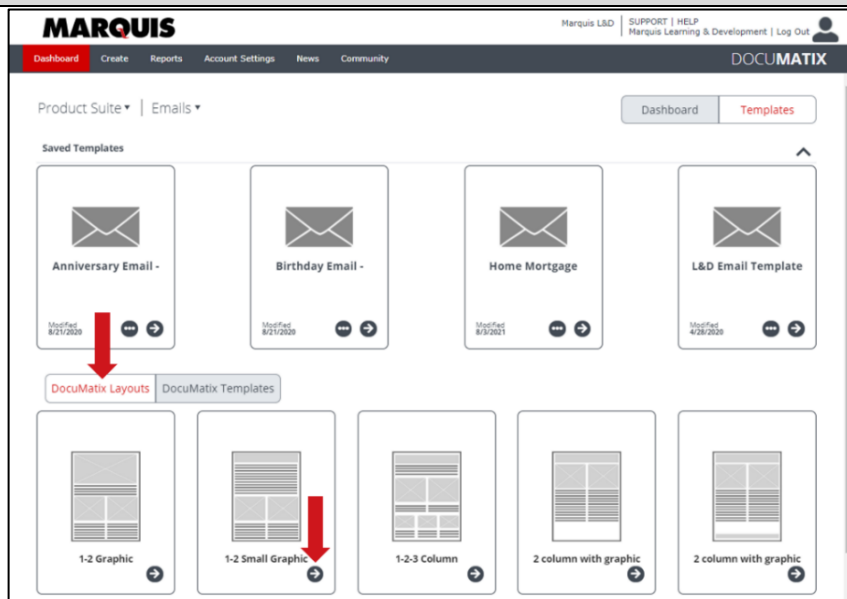


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DMX303	Creating an Email Using a Layout
	Use this step-by-step process to create a new Email using a layout.
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Emails module
	 <p>The screenshot shows the Marquis DocuMatix dashboard. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The 'DocuMatix' logo is on the right. Below the navigation bar, there are dropdown menus for 'Product Suite' and 'Emails', both with red arrows pointing to them. Underneath, there's an 'Add New' section with six cards: Standard, Marketing Path, Newsletter, Triggered, Web Form, and PURL. Each card has a 'New Template' button. Below that is a 'Recent Work' section with tabs for 'Drafts', 'Scheduled', 'Published', and 'Completed'. There are also filters for 'All Types' and 'All Folders'. The main content area displays five email cards with subjects like 'Credit Union Anniversary - Customer Outreach', 'New Customer Survey', 'Holiday Savings - Fall Promotion', 'Learning and Development Newsletter #1', and 'Member Savings'. Each card has an 'L&D Sample' button and a 'Modified' date.</p>
Step 3	Choose the desired email type
Step 4	Under the Add New section, click Template on the appropriate card
Step 5	Under the second section, toggle to DocuMatix Layouts , choose the desired layout, and click the Create icon 

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Note: In addition to the **Create** icon, the **Options** icon  gives you the ability to **Edit, Rename, Delete,** and **Preview And Test** templates.



Step 6 Complete or make modifications to **The Basics** page

Note: Anything in italics is an optional field as noted below. Some of the fields will auto populate from Account Settings.

- Name
- Description (optional)
- Store your email in a folder

Step 7 Click **Continue** to advance to the **Editing your email** page

Step 8 Make any changes to the existing items in the template

Step 9 Select an icon that corresponds to the function desired by “Click, Drag, and Drop” the icon into the body of the email being created

-  Image

-  Text

-  Text + Image

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.

-  Social











-  Copy Cell

-  Web Poll

-  Submit Button

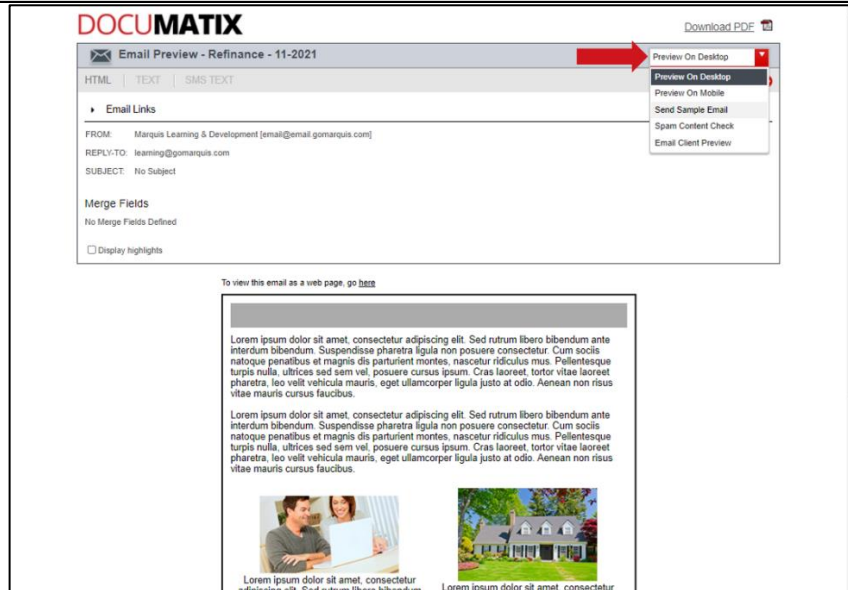
-  Video


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	<ul style="list-style-type: none">  Divider
Step 10	Click and adjust email parameters as needed
	<ul style="list-style-type: none">  Full Screen (It is necessary to disable this function before moving the the next screen.)
	<ul style="list-style-type: none">  Toggle Gridlines
	<ul style="list-style-type: none">  Toggle Resize
	<ul style="list-style-type: none">  Settings
Step 11	Hover over each cell to Edit, Move, or Delete
	<ul style="list-style-type: none">  Edit
	<ul style="list-style-type: none">  Move
	<ul style="list-style-type: none">  Delete
Step 12	To Preview, click the Preview icon 
Step 13	<p>Select from the following options:</p> <ul style="list-style-type: none"> Preview On Desktop Preview On Mobile Send Sample Spam Content Check Email Client Preview
	 <p>The screenshot shows the Marquis DocuMatix interface. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. Below that, a progress indicator shows '2 Editing your email' out of four steps. The main content area is titled 'Refinance 11-2021*' and contains a 'DocuMatix Email Editor' and a 'Text View' tab. A preview menu is open on the right, listing options: 'Preview On Desktop', 'Preview On Mobile', 'Send Sample', 'Spam Content Check', and 'Email Client Preview'. A red arrow points to the 'Preview On Desktop' option.</p>


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Note: The preview opens in a new browser window. From that window, you can toggle between preview options. Click on the preferred testing Method. The test email will appear in a new browser tab.



Step 14 If a misstep was made and the changes need to be reset, return to the original browser tab, and click on the **History** button 

- 14.1 Hover over the versions in **Email History**
- 14.2 Click **View** to preview the version for each email
- 14.3 Once the desired version is found, click **Revert**

Step 15 The system autosaves every minute, but we recommend clicking on **Save**  on the right side of the menu bar



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Note: Clicking the **Validate** button is optional, but recommended before proceeding, as this will save time when the email is scheduled for launch. Clicking Validate will identify any missing pieces (e.g., required alt text) or invalid links. If this step is skipped now, validation will happen automatically when the email is scheduled for launch.

Step 16 Click the **Inbox Appearance** in the top center of the page

Step 17 Complete the **Inbox Appearance** page

- Email Subject, if needed **Use Merge Fields** and **Use Emoji**
- Preview Text, if needed **Use Merge Fields**
- From
- Reply-to Address

Step 18 Click **Continue** to advance to the **Email Recipients** page

Note: Not every type of email will have the **Email Recipients** page.

Step 19 **Drag and Drop** the file into the box or click **Select Files** to browse and select the desired file

Note: The data file must be in a CSV format with the header row located within the first row. The header row cannot contain spaces, numbers, or special characters.

Step 20 To include duplicates, select the check box, if desired

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Dashboard Create Reports Account Settings News Community **DOCUMATIX**

1 The Basics 2 Editing your email 3 Inbox Appearance 4 **Email Recipients**

← Add Recipients to **Auto Loan - 12-2021**

Allow duplicate email address

Use the file uploading area below to add your recipient CSV file. Before you proceed, there are a few things to remember:

- File headers should not contain spaces (" ").
- The maximum size allowed for any field imported is 500 characters.

Drag and Drop files here
or
Select Files

Note: At the completion of the data file being uploaded, the record information will appear under the header of the Map Merge Fields page.

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Dashboard Create Reports Account Settings News Community **DOCUMATIX**

1 The Basics 2 Editing your email 3 Inbox Appearance 4 **Email Recipients**

← Map Merge Fields to **Auto Loan - 12-2021** Continue

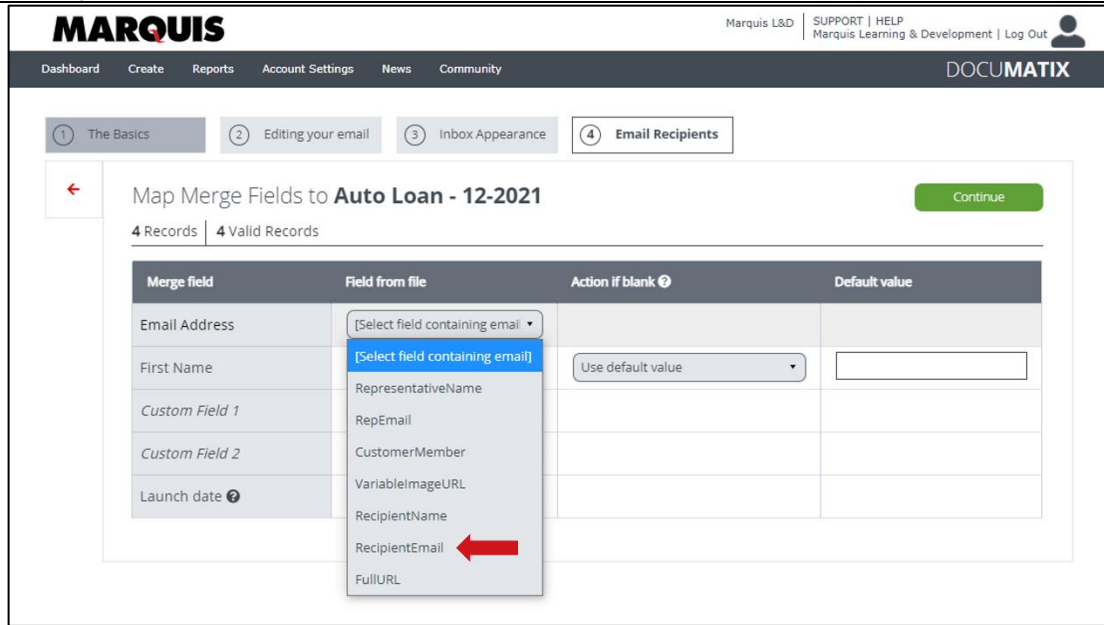
4 Records | 4 Valid Records

Merge field	Field from file	Action if blank	Default value
Email Address	[Select field containing email]		
First Name	[Select field containing data]	Use default value	
Custom Field 1	[Do not use custom field]		
Custom Field 2	[Do not use custom field]		
Launch date	[Do not use launch date]		

Step 21 Complete the **Map Merge Fields** page

Note: Mapping is the process of aligning the merge fields created within DocuMatix to the header fields contained in the CSV file.

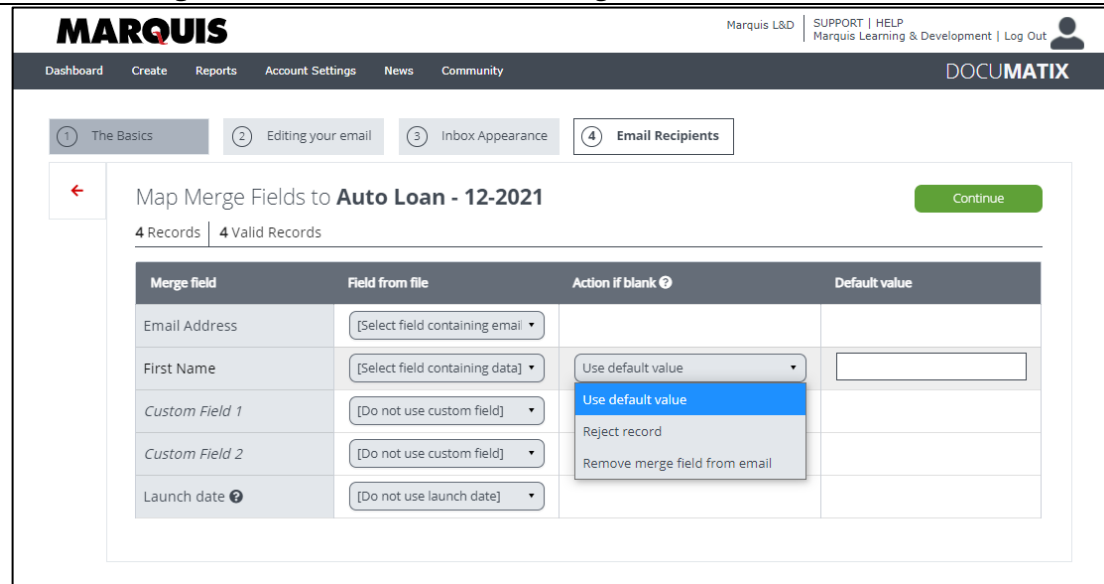
21.1 Using the drop-down arrow, select the **Email Address** from the list



21.2 Use the drop-down arrow to select the appropriate field for each required merge field

21.3 Use the drop-down arrow to select the desired Action if blank:

- **Use default value:** The default value entered will be used in place of a custom value
- **Reject record:** The email will not be sent to that recipient
- **Remove merge field from the email:** The merge field will be removed from the email



21.4 If "Use Default Value" action is selected, enter the desired text into the **Default value** field

21.5 Select the optional fields, if desired

Note: The Merge fields containing "Custom Field" in the name are optional data fields that can be populated for reporting capabilities but will not be placed in the email.

21.6 Select the launch date if one is present in the file

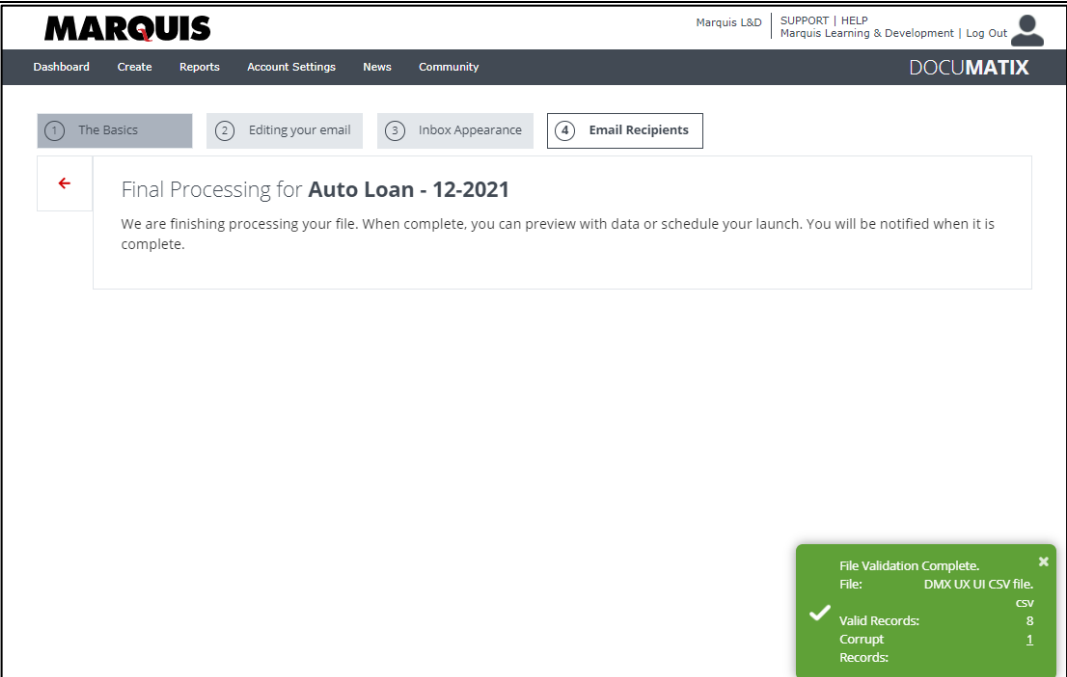
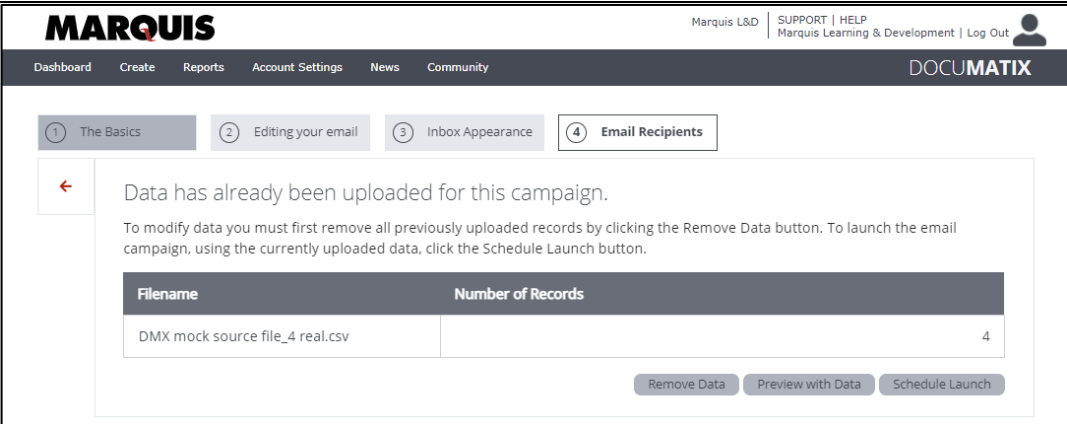
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Note: When selecting a launch date field, if a record contains a blank in the Launch Date field, the email will not be sent out.

21.7 Click **Continue**.

Note: If the data file contains **Invalid** and/or **Corrupt Records**, they will be automatically removed, and the file will be uploaded. Clicking the underlined number to the right of **Corrupt Records** will open an Excel file which provides reasons the records were classified as corrupt. **Invalid Records** indicate there is missing data and **Corrupt Records** indicate that an email address is not in the correct format.

	A	B	C	D	E	F	G	H	I
1	File_Name	Email_Address	[--Merge1--]	[--Merge2--]	[--Merge3--]	AntiPhishing	Reason		
2	DMX mock source file.csv	David Weisz	David Weisz	David Weisz	https://www.chicago.gov/content/dam/c		Invalid email address format		
3	DMX mock source file.csv	Nancy Folsom	Nancy Folsom	Nancy Folsom	Email		Invalid email address format		
4	DMX mock source file.csv	Deidre Collins	Deidre Collins	Deidre Collins	Email		Invalid email address format		
5	DMX mock source file.csv	Jeremiah Jenkins	Jeremiah Jenkins	Jeremiah Jenkins	Email		Invalid email address format		
6	DMX mock source file.csv	Phyllis Smith	Phyllis Smith	Phyllis Smith	Email		Invalid email address format		
7	DMX mock source file.csv	Doug Jones	Doug Jones	Doug Jones	Email		Invalid email address format		
8	DMX mock source file.csv	Brett Kirtman	Brett Kirtman	Brett Kirtman	Email		Invalid email address format		
9	DMX mock source file.csv	Jen Taylor	Jen Taylor	Jen Taylor	Email		Invalid email address format		
10	DMX mock source file.csv	Amanda Douglas	Amanda Douglas	Amanda Douglas	Email		Invalid email address format		

Step 22	<p>To continue, click Next</p>  <p>The screenshot shows the Marquis DMX interface. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The 'Email Recipients' step is highlighted in the breadcrumb trail. The main content area displays 'Final Processing for Auto Loan - 12-2021' with a message: 'We are finishing processing your file. When complete, you can preview with data or schedule your launch. You will be notified when it is complete.' A green notification box in the bottom right corner contains the following information:</p> <ul style="list-style-type: none">File Validation Complete. (Close icon)File: DMX UX UI CSV file. (Close icon)Valid Records: 8Corrupt: 1Records: 1				
Step 23	<p>Click Schedule Launch. For more information, please refer to procedure DMX375 How to Schedule an Email Launch.</p>  <p>The screenshot shows the Marquis DMX interface. The breadcrumb trail is the same as in Step 22. The main content area displays 'Data has already been uploaded for this campaign.' with instructions: 'To modify data you must first remove all previously uploaded records by clicking the Remove Data button. To launch the email campaign, using the currently uploaded data, click the Schedule Launch button.' Below this is a table with the following data:</p> <table border="1"><thead><tr><th>Filename</th><th>Number of Records</th></tr></thead><tbody><tr><td>DMX mock source file_4 real.csv</td><td>4</td></tr></tbody></table> <p>At the bottom of the table, there are three buttons: 'Remove Data', 'Preview with Data', and 'Schedule Launch'.</p>	Filename	Number of Records	DMX mock source file_4 real.csv	4
Filename	Number of Records				
DMX mock source file_4 real.csv	4				