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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
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 ➜

Note: In addition to the **Create** icon, the **Options** icon ⬤⬤⬤ gives you the ability to **Edit**, **Rename**, **Delete**, and **Preview And Test** templates.	
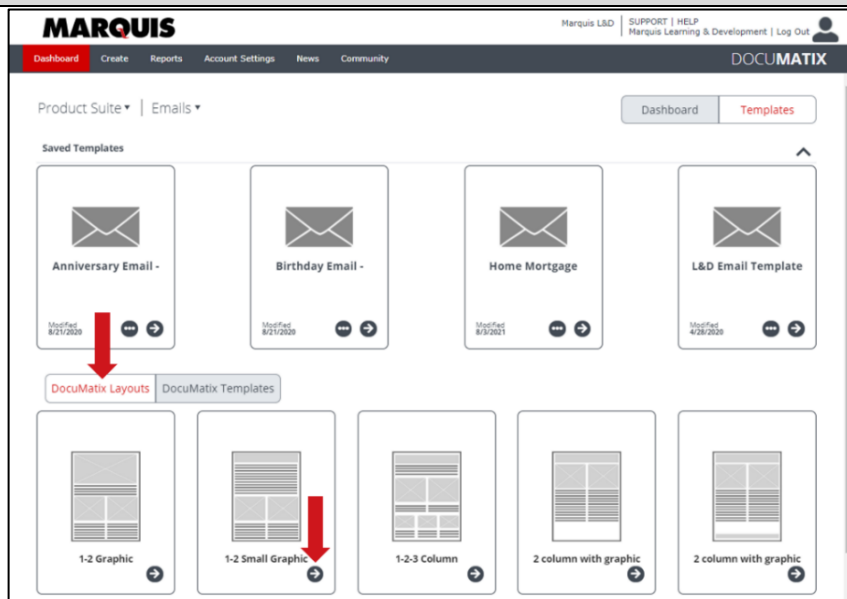
Step 6	Complete or make modifications to **The Basics** page
Note: Anything in italics is an optional field as noted below. Some of the fields will auto populate from Account Settings.	
	• Name
	• Description (optional)
	• Store your email in a folder
Step 7	Click **Continue** to advance to the **Editing 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 Image
	• ☰ Text Text
	• ☰🖼 Text + Image 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 Social
	• ▤ Copy Cell Copy Cell
	• ▥ Web Poll Web Poll
	• Submit Button Submit Button
	• ▣ Video Video

|		
	• ▭ Divider	
Step 10	Click and adjust email parameters as needed	
	• ⤢ Full Screen (It is necessary to disable this function before moving the the next screen.)	
	• ▦ Toggle Gridlines	
	• ✥ Toggle Resize	
	• ⚙ Settings	
Step 11	Hover over each cell to **Edit, Move,** or **Delete**	
	• ✏ Edit	
	• ✥ Move	
	• 🗑 Delete	
Step 12	To Preview, click the **Preview icon** 👁	
Step 13	Select from the following options: • Preview On Desktop • Preview On Mobile • Send Sample • Spam Content Check • Email Client Preview	

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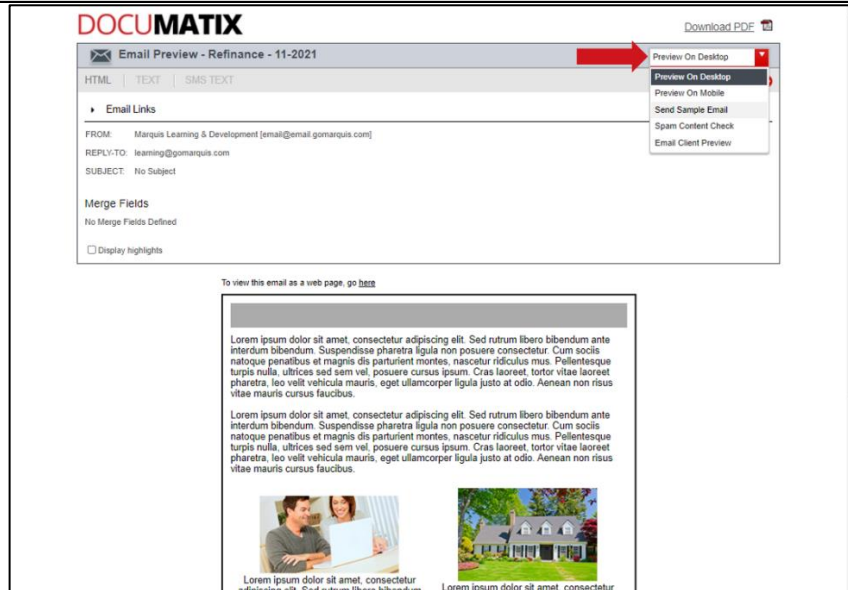
Step 14	If a misstep was made and the changes need to be reset, return to the original browser tab, and click on the **History** button
14.1	Hover over the versions in **Email History**
14.2	Click **View** to preview the version for each email
14.3	Once the desired version is found, click **Revert**
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.	

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

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

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. | |

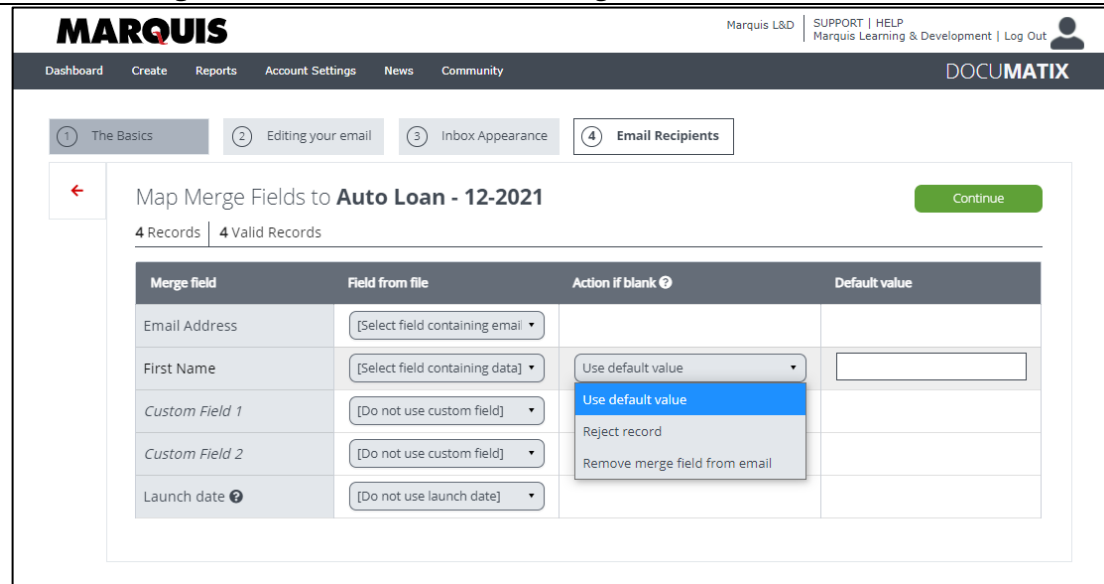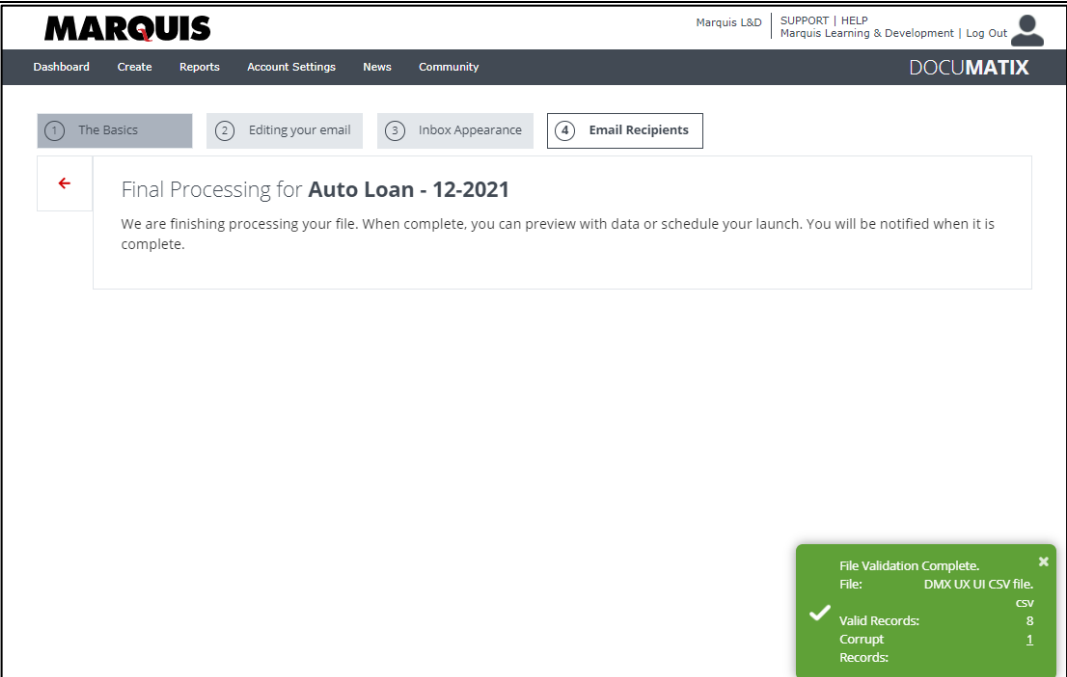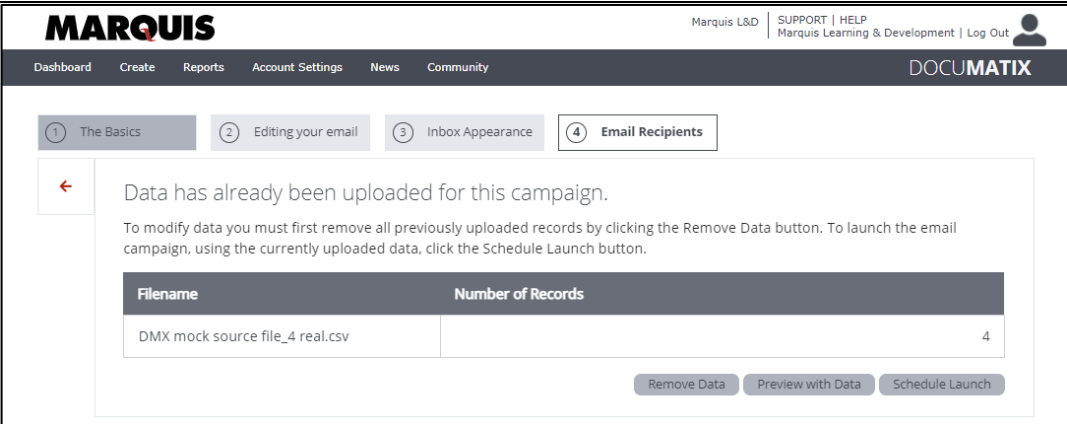| 21.1	Using the drop-down arrow, select the **Email Address** from the list
21.2	Use the drop-down arrow to select the appropriate field for each required merge field
21.3	Use the drop-down arrow to select the desired Action if blank:
	• **Use default value**: The default value entered will be used 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
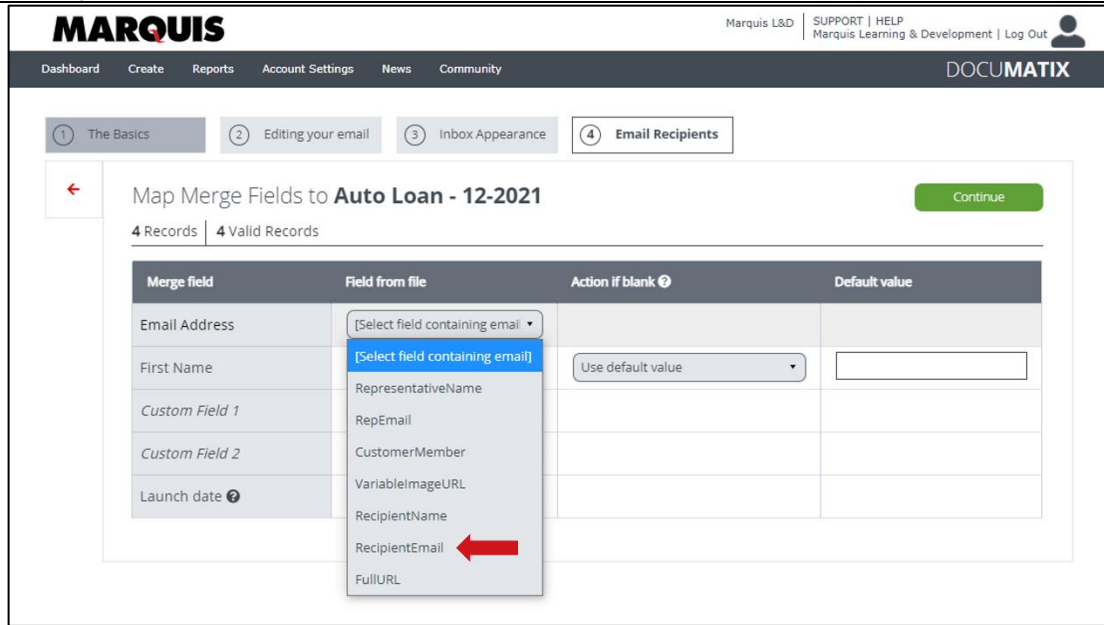
Note: When selecting a launch date field, if a record contains a blank in the Launch Date field, the email will not be sent out.

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.

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Step 22	To continue, click **Next**
Step 23	Click **Schedule Launch**. For more information, please refer to procedure **DMX375 How to Schedule an Email Launch**.