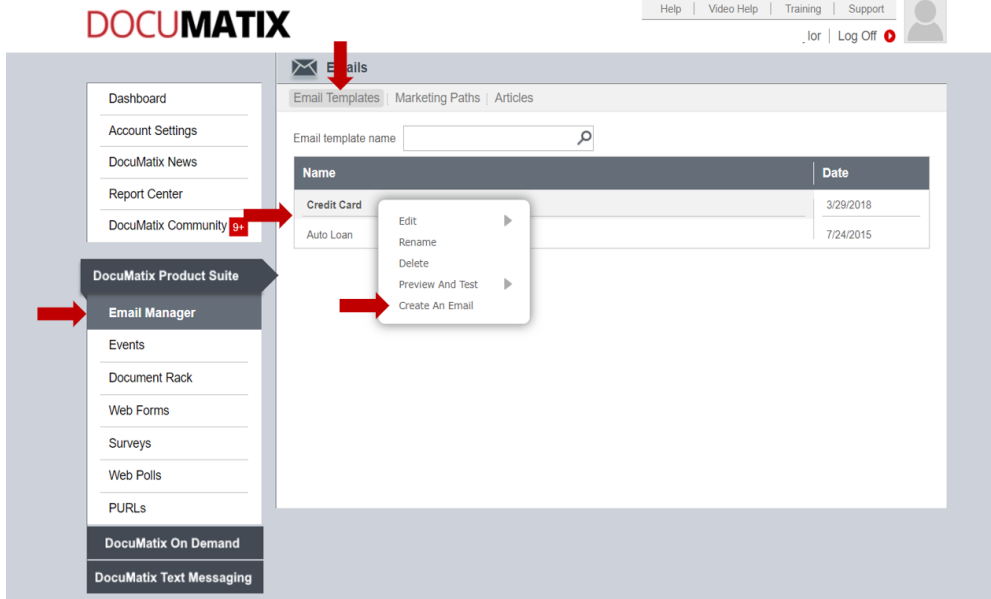
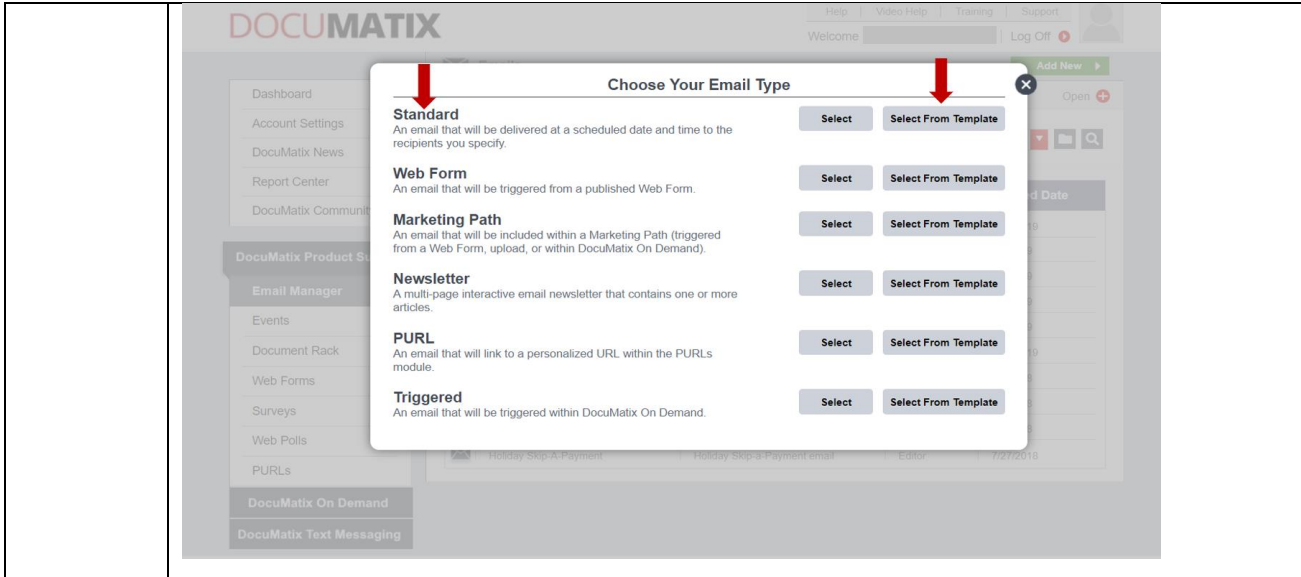


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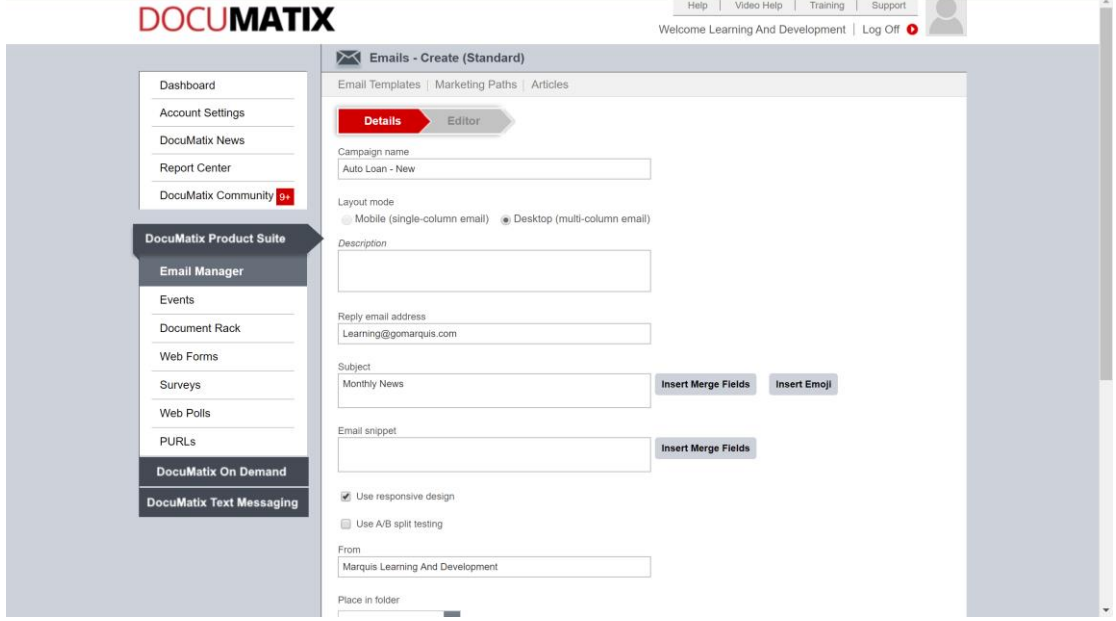















<b>DMX304</b>	<b>Accessing Saved Templates</b>
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>DocuMatix</b>
<b>Step 2</b>	Click on <b>"Email Manager"</b> on left side of the menu
	To access only the <b>Saved Templates</b> created by the users of the institution, move to <b>Step 3</b> . To access all <b>Saved Templates</b> provided by DocuMatix and users of the institution, move to <b>Step 4</b> .
<b>Step 3</b>	Click on the <b>Email Templates</b> option located to the right of the menu ribbon
3.1	Click on a specific <b>Template</b>
	 <p>The screenshot shows the DocuMatix interface. On the left is a navigation menu with 'Email Manager' highlighted. The main content area shows the 'Email Templates' section with a search bar and a table of templates. A context menu is open over the 'Credit Card' template, showing options like 'Edit', 'Rename', 'Delete', 'Preview And Test', and 'Create An Email'. Red arrows indicate the path: from 'Email Manager' in the menu to the 'Email Templates' tab, and then to the 'Create An Email' button in the context menu.</p>
3.2	Click <b>Create Email</b> and continue with <b>Step 8</b>
	To access all available <b>Saved Templates</b> created by DocuMatix or users of the institution, move to <b>Step 4</b>
<b>Step 4</b>	Click on the green <b>"Add New"</b> button in the top right of the page
<b>Step 5</b>	Under Standard click on <b>"Select From Template"</b>

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<b>Step 6</b>	Choose a Template box pops up, click on <b>"Saved Templates"</b>
<b>Step 7</b>	Hover over the desired template and click on <b>"Select"</b> to access
<b>Step 8</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>
8.1	Click on <b>"Next"</b>

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<p><b>Step 9</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>
	<p> Edit</p>
	<p> Settings</p>
	<p> Delete</p>
<p><b>Step 10</b></p>	<p>To make adjustments to the template structure, 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>10.1</p>	<p>Click and adjust email paramiters as needed</p>
	<p> Grid Lines</p>
	<p> Resized</p>
	<p> Settings</p>
<p><b>Step 11</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 12</b></p>	<p>Click on the preferred testing Method</p>

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<b>Step 13</b>	If a misstep was made and the changes need to be reset, click on the <b>History</b> button
<b>Step 14</b>	Click the <b>drop-down arrow</b> for <b>Select a Version</b>
<b>Step 15</b>	Click on a version to verify the settings
<b>Step 16</b>	Once the desired version is found, click <b>Revert To This Version</b>
<b>Step 17</b>	The system autosaves every minute but we recommend clicking on " <b>Save</b> " on the right side of the menu bar
<b>Step 18</b>	Click the green button " <b>Return to Emails</b> " to right corner of the page

