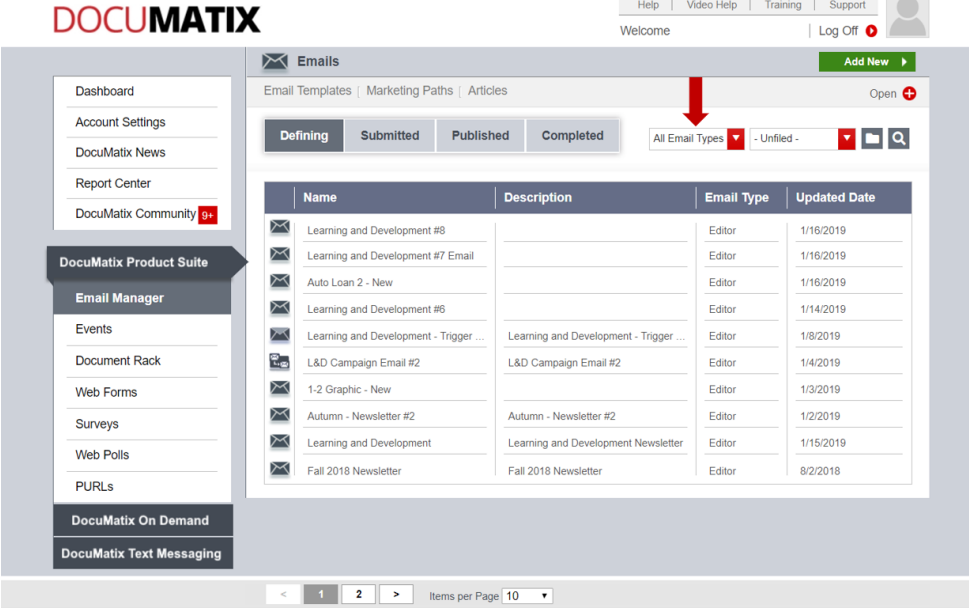
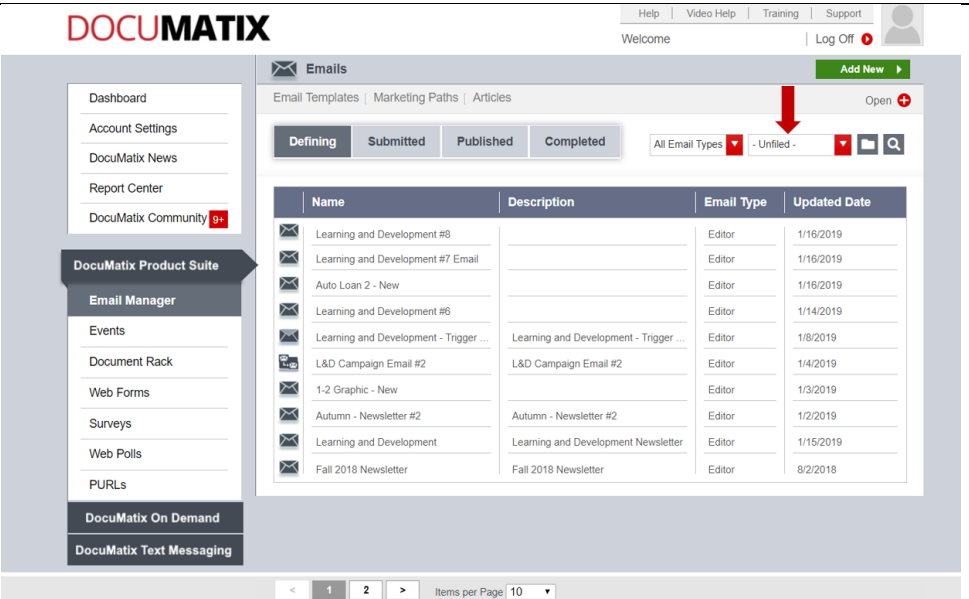


MARQUIS

DMX311	Defining Actions for Emails																																												
Order of Steps	Tasks																																												
Step 1	Log into DocuMatix																																												
Step 2	Click on “Email Manager” on left side of the menu																																												
Step 3	To narrow down by email type, click on the middle drop-down arrow in the box and click on the desired type of email																																												
	 <p>The screenshot shows the DocuMatix interface with the 'Emails' section active. The left sidebar contains navigation options like 'Dashboard', 'Account Settings', and 'Email Manager'. The main content area displays a table of email templates. A red arrow points to the 'All Email Types' dropdown menu, which is currently set to '- Unfiled -'.</p> <table border="1" data-bbox="630 688 1279 995"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Email Type</th> <th>Updated Date</th> </tr> </thead> <tbody> <tr> <td>Learning and Development #8</td> <td></td> <td>Editor</td> <td>1/18/2019</td> </tr> <tr> <td>Learning and Development #7 Email</td> <td></td> <td>Editor</td> <td>1/16/2019</td> </tr> <tr> <td>Auto Loan 2 - New</td> <td></td> <td>Editor</td> <td>1/16/2019</td> </tr> <tr> <td>Learning and Development #6</td> <td></td> <td>Editor</td> <td>1/14/2019</td> </tr> <tr> <td>Learning and Development - Trigger ...</td> <td>Learning and Development - Trigger ...</td> <td>Editor</td> <td>1/8/2019</td> </tr> <tr> <td>L&D Campaign Email #2</td> <td>L&D Campaign Email #2</td> <td>Editor</td> <td>1/4/2019</td> </tr> <tr> <td>1-2 Graphic - New</td> <td></td> <td>Editor</td> <td>1/3/2019</td> </tr> <tr> <td>Autumn - Newsletter #2</td> <td>Autumn - Newsletter #2</td> <td>Editor</td> <td>1/2/2019</td> </tr> <tr> <td>Learning and Development</td> <td>Learning and Development Newsletter</td> <td>Editor</td> <td>1/15/2019</td> </tr> <tr> <td>Fall 2018 Newsletter</td> <td>Fall 2018 Newsletter</td> <td>Editor</td> <td>8/2/2018</td> </tr> </tbody> </table>	Name	Description	Email Type	Updated Date	Learning and Development #8		Editor	1/18/2019	Learning and Development #7 Email		Editor	1/16/2019	Auto Loan 2 - New		Editor	1/16/2019	Learning and Development #6		Editor	1/14/2019	Learning and Development - Trigger ...	Learning and Development - Trigger ...	Editor	1/8/2019	L&D Campaign Email #2	L&D Campaign Email #2	Editor	1/4/2019	1-2 Graphic - New		Editor	1/3/2019	Autumn - Newsletter #2	Autumn - Newsletter #2	Editor	1/2/2019	Learning and Development	Learning and Development Newsletter	Editor	1/15/2019	Fall 2018 Newsletter	Fall 2018 Newsletter	Editor	8/2/2018
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Step 4	To access a specific folder, click on drop-down arrow to the far right and select the desired folder.																																												
	 <p>This screenshot is identical to the previous one, but the red arrow points to the second dropdown arrow in the top right of the email list area, which is used to select a specific folder.</p>																																												
Step 5	Under the “Defining” click on the email name																																												
5.1	A Menu box will pop up																																												

MARQUIS

	<ul style="list-style-type: none"> • Edit
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Details - Changes can be made to the detail page ○ Editor - Email can be re-edited
	<ul style="list-style-type: none"> • Copy - A duplicate of the email can be made and will show up in the Defining tab
	<ul style="list-style-type: none"> • Delete - Emails can be eliminated
	<ul style="list-style-type: none"> • Save as Template - Email designs can be saved as Templates
	<ul style="list-style-type: none"> • Merge Fields - A list of merged fields within the email
	<ul style="list-style-type: none"> • Preview and Test
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Preview On Desktop ○ Preview On Mobile ○ Send Sample ○ Spam Content Check ○ Email Client Preview
	<ul style="list-style-type: none"> • Upload Data File
	<ul style="list-style-type: none"> • Data Upload Summary
	<ul style="list-style-type: none"> • Schedule Launch
	<ul style="list-style-type: none"> • Convert To
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Calculator Results Email ○ Marketing Path Email ○ Web Form Email ○ Triggered Email ○ PURL Email ○ Newsletter Email
	<ul style="list-style-type: none"> • Move to Folder - move email to another folder