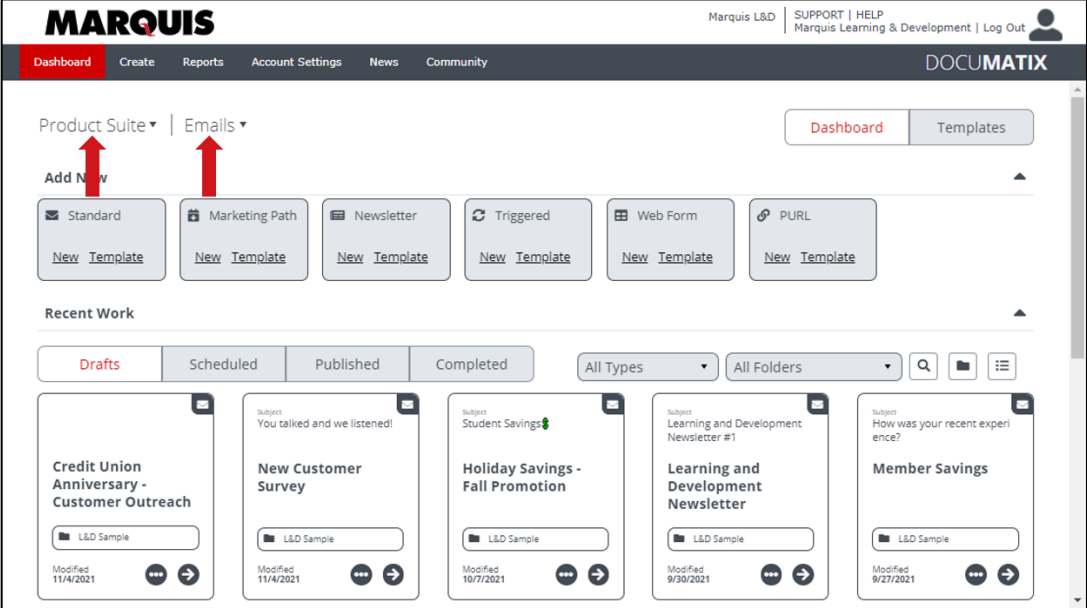
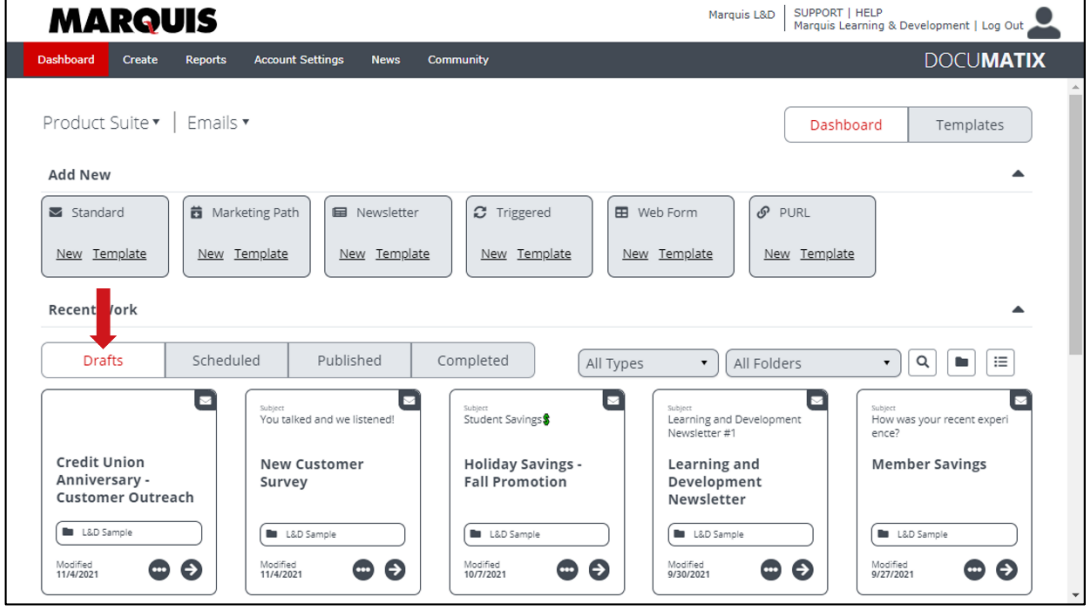
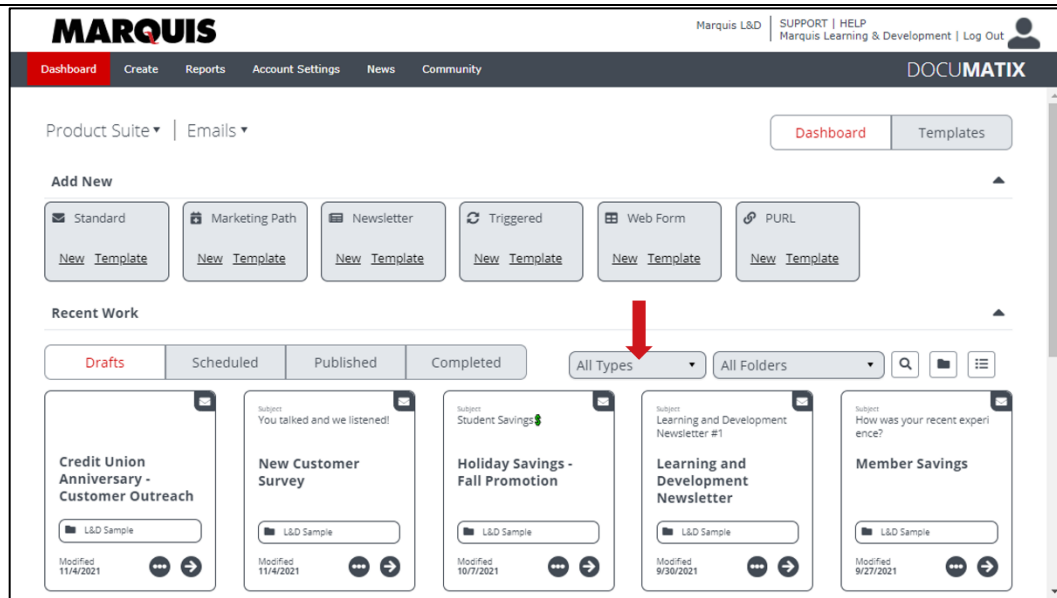


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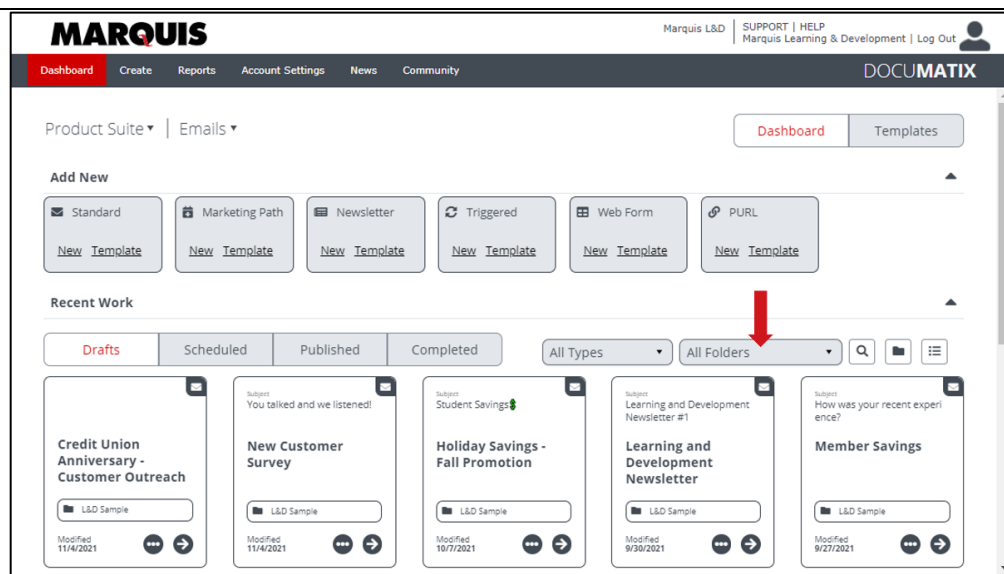
DMX311	Drafts Actions for Emails
	This step-by-step process provides an overview of all actions available under the Drafts tab in the Recent Work section of the Dashboard .
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Emails module
	 <p>The screenshot shows the Marquis dashboard with the 'Emails' module selected. The 'Product Suite' and 'Emails' dropdown menus are highlighted with red arrows. The dashboard includes a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. Below the navigation bar, there are tabs for 'Dashboard' and 'Templates'. The main content area shows a grid of email templates under the 'Add New' section, including 'Standard', 'Marketing Path', 'Newsletter', 'Triggered', 'Web Form', and 'PURL'. Below this is the 'Recent Work' section, which is currently set to 'Drafts' and displays five email cards: 'Credit Union Anniversary - Customer Outreach', 'New Customer Survey', 'Holiday Savings - Fall Promotion', 'Learning and Development Newsletter', and 'Member Savings'. Each card includes a subject line, a preview, an 'L&D Sample' button, and a 'Modified' date.</p>
Step 3	Click the Drafts tab
	 <p>The screenshot shows the Marquis dashboard with the 'Drafts' tab selected in the 'Recent Work' section. A red arrow points to the 'Drafts' tab. The dashboard layout is identical to the previous screenshot, but the 'Drafts' tab is highlighted in red, and the 'Recent Work' section displays the same five email cards as before.</p>

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Step 4 To narrow down by email type, click the **All Types** drop-down arrow in the box and click on the desired type of email




Step 5 To access a specific folder, click the **All Folders** drop-down arrow to the far right and select the desired folder



Step 6 Under **Drafts**, click the **Options** icon

- 6.1 A Menu box will pop up
- **Edit**
 - Basics – Changes can be made to the Name, Description, Location of the email
 - Editor – Email can be edited
 - Inbox Appearance – Changes can be made to the Email Subject, Preview Text, From Email Address, Sender Name, and Reply-to Address

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	<ul style="list-style-type: none"> • Copy – A duplicate of the email can be made and will show up in the Drafts tab
	<ul style="list-style-type: none"> • Delete – Emails can be removed
	<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"> ○ Email Validation ○ 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"> ○ 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
6.2	<p>In addition to the Options icon, you can select the Edit icon  which opens The Basics page</p>