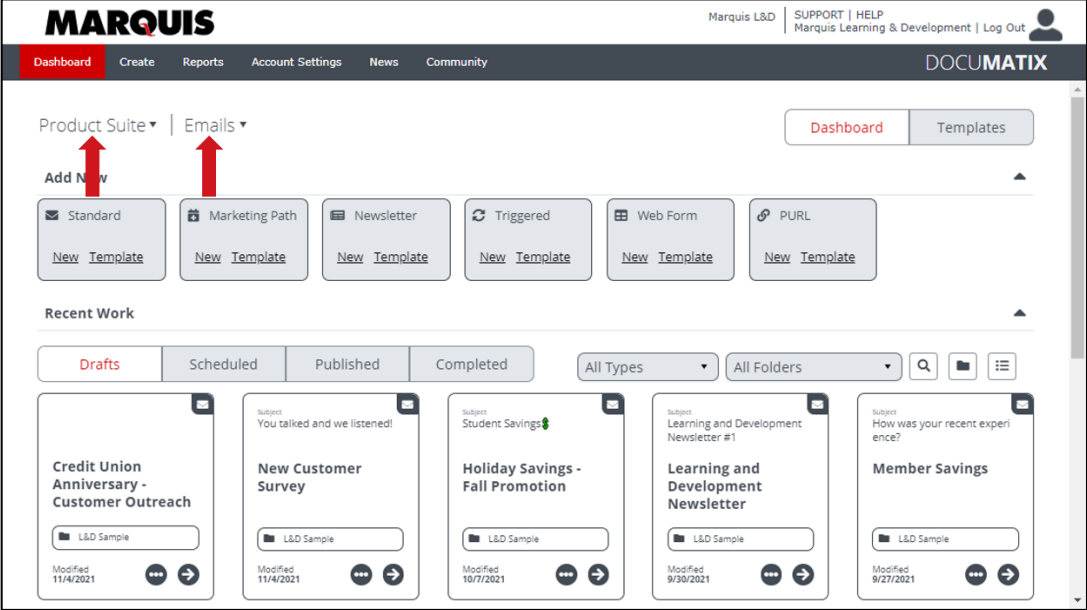
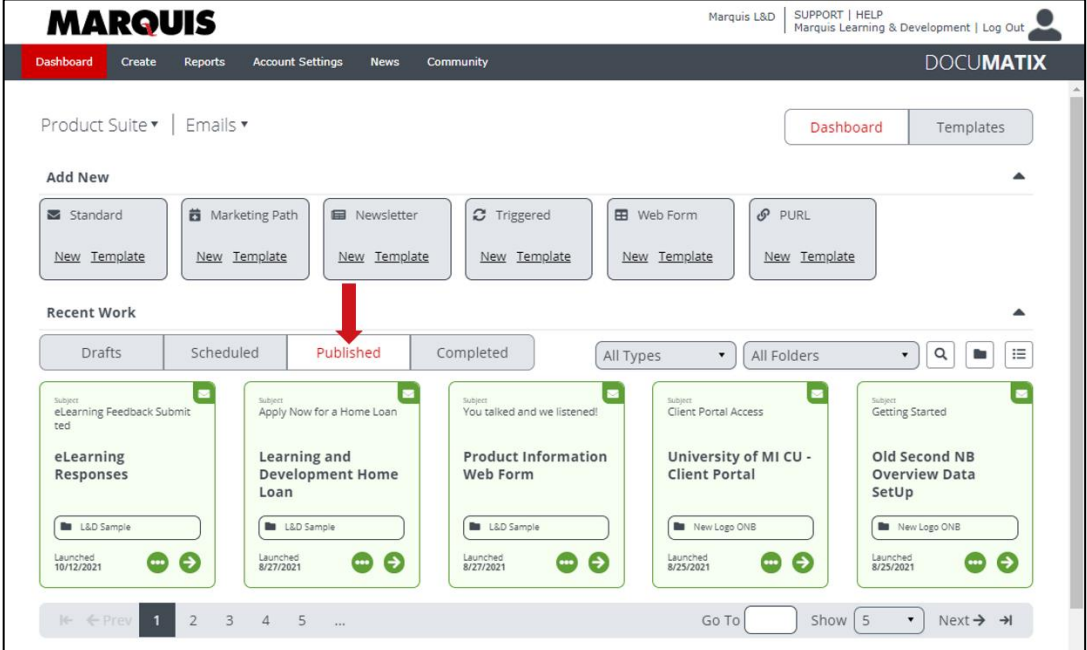


MARQUIS

DMX312	Published Menu Options for Emails
	<p>This step-by-step process provides an overview of all actions available under the Published tab in the Recent Work section of the Dashboard.</p>
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 interface. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The 'Emails' module is selected in the top right. Below this, there's a 'Product Suite' and 'Emails' dropdown menu. A red arrow points to 'Product Suite' and another to 'Emails'. Underneath, there's an 'Add New' section with several buttons for different email types: Standard, Marketing Path, Newsletter, Triggered, Web Form, and PURL. Each button has a 'New Template' link. Below that is the 'Recent Work' section, which has tabs for 'Drafts', 'Scheduled', 'Published', and 'Completed'. The 'Drafts' tab is active, showing a list of email drafts with details like subject, title, and modification date.</p>
Step 3	Click the Published tab
	 <p>This screenshot shows the same Marquis dashboard as the previous one, but with the 'Published' tab selected in the 'Recent Work' section. A red arrow points to the 'Published' tab. The 'Recent Work' section now displays a list of published emails. Each email card shows the subject, title, a 'New Logo ONB' button, and a 'Launched' date. The 'eLearning Responses' email is highlighted with a green border. At the bottom, there's a pagination control showing '1' of 5 items.</p>

MARQUIS

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



The screenshot shows the Marquis DOCUMATIX dashboard. At the top, there is a navigation bar with 'Dashboard' selected, and links for 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The user is logged in as 'Marquis L&D'. Below the navigation bar, there are tabs for 'Dashboard' and 'Templates'. The main content area is titled 'Product Suite | Emails'. Under 'Add New', there are six buttons for different email types: Standard, Marketing Path, Newsletter, Triggered, Web Form, and PURL, each with a 'New Template' link. Below this is the 'Recent Work' section, which has tabs for 'Drafts', 'Scheduled', 'Published', and 'Completed'. A dropdown menu labeled 'All Types' is open, and a red arrow points to it. To the right of the 'All Types' dropdown is another dropdown labeled 'All Folders'. Below these are five email cards, each with a subject line, a title, a 'New Logo ONB' button, and a 'Launched' date. The first card is 'eLearning Responses' (Launched 10/12/2021), the second is 'Learning and Development Home Loan' (Launched 8/27/2021), the third is 'Product Information Web Form' (Launched 8/27/2021), the fourth is 'University of MI CU - Client Portal' (Launched 8/25/2021), and the fifth is 'Old Second NB Overview Data SetUp' (Launched 8/25/2021). At the bottom, there is a pagination bar with 'Go To' and 'Show 5'.

Step 5

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

This screenshot is identical to the one in Step 4, showing the Marquis DOCUMATIX dashboard. The 'All Types' dropdown menu is now closed, and a red arrow points to the 'All Folders' dropdown menu, which is located to the right of the 'All Types' dropdown. The rest of the interface, including the 'Add New' buttons, 'Recent Work' cards, and pagination, remains the same.

MARQUIS

Step 6	Under Published , click the Options icon 
6.1	<p>A Menu box will pop up.</p> <ul style="list-style-type: none"> • Copy - A duplicate of the email can be made and will show up in the Defining tab • Edit Details - Changes can be made to the campaign name and description • Save as Template - Email designs can be saved as Templates • Merge Fields - A list of merged fields within the email • 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 • Reports - specific to the email selected <ul style="list-style-type: none"> ○ Email Statistics ○ CTR (Click Through Rate) Heat Map ○ Create Scheduled Report • Launch Details • Marketing Automations (for Trigger Emails only) - review the Marketing Automations the Trigger email is tied to <ul style="list-style-type: none"> ○ Click on a Marketing Automation listed <ul style="list-style-type: none"> ▪ View - Details or Decision Tree ▪ Edit - Decision Tree ▪ Copy ▪ Demote ▪ Archive ▪ Reports - Decision Tree Statistics • Revision History - A list of revisions will be available <ul style="list-style-type: none"> ○ Click on a Revision in the list <ul style="list-style-type: none"> ▪ Merge Fields ▪ Preview and Test ▪ Reports - Email Statistics and CTR Heat Map • Web Service Data - View the unique identifier for the trigger email campaign • Move to Folder - move email to another folder
6.2	<p>In addition to the Options icon, you can select the View Report icon  which opens the Email Statistics Report</p>