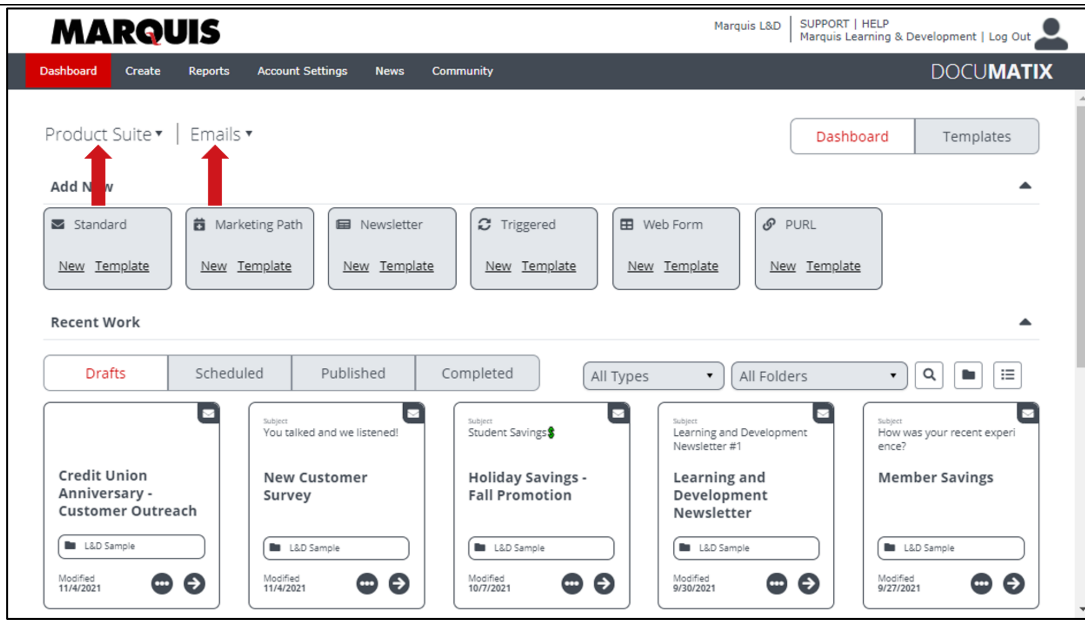
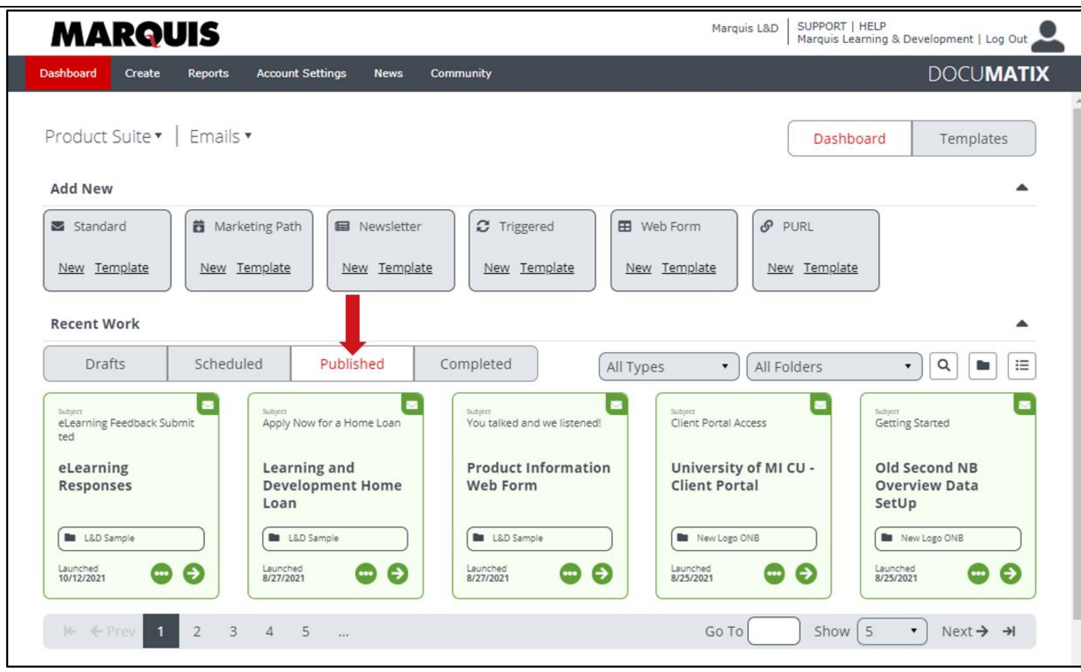
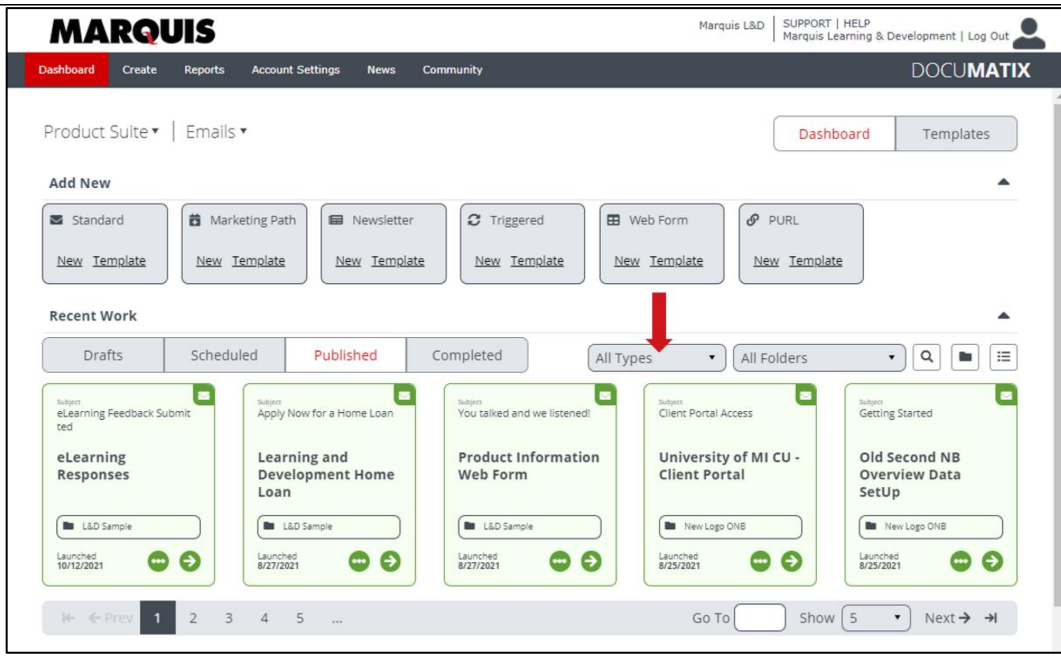
| DMX312 | Published Menu Options for Emails |
|---|---|
| | This step-by-step process provides an overview of all actions available under the **Published** tab in the **Recent Work** section of the **Dashboard**. |
| **Order of Steps** | **Tasks** |
| **Step 1** | Log into **DocuMatix** |
| **Step 2** | Select the **Product Suite** product and the **Emails** module |

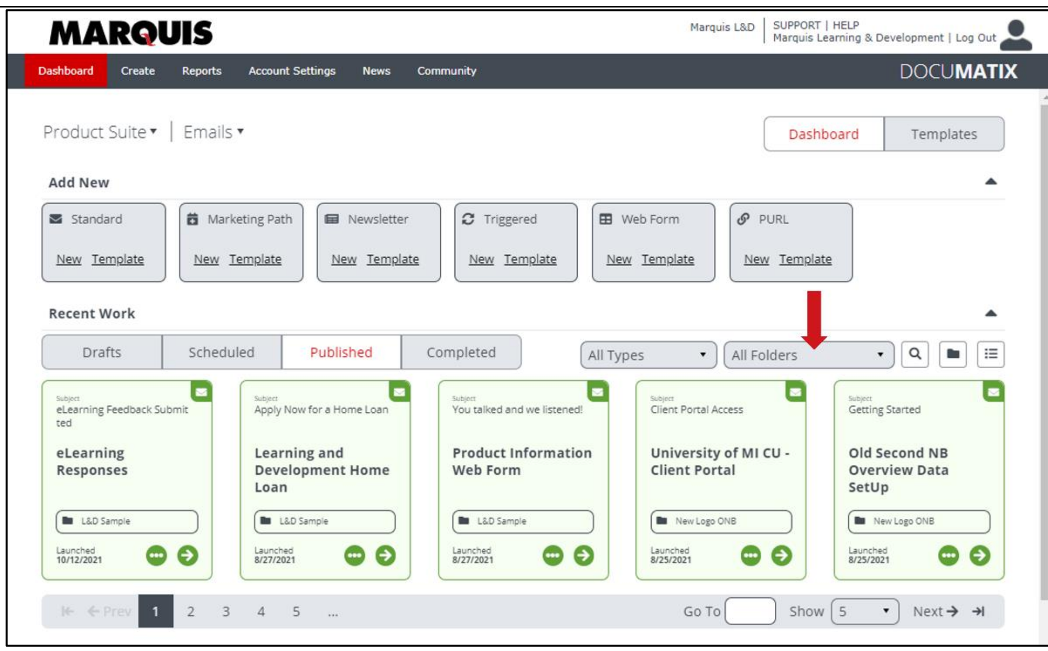



| | |
|---|---|
| **Step 3** | Click the **Published** tab |



MARQUIS

<table>
<tr><td>Step 4</td><td>To narrow down by email type, click the All Types drop-down arrow in the box and click on the desired type of email</td></tr>
<tr><td></td><td>


</td></tr>
<tr><td>Step 5</td><td>To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder</td></tr>
<tr><td></td><td>


</td></tr>
</table>

MARQUIS

| Step 6 | Under **Published**, click the **Options** icon |
|---|---|
| 6.1 | A Menu box will pop up. |
| | • **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** |
| | ○ Email Validation |
| | ○ Preview On Desktop |
| | ○ Preview On Mobile |
| | ○ Send Sample |
| | ○ Spam Content Check |
| | ○ Email Client Preview |
| | • **Reports** – specific to the email selected |
| | ○ 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 |
| | ○ Click on a Marketing Automation listed |
| | ▪ View – Details or Decision Tree |
| | ▪ Edit – Decision Tree |
| | ▪ Copy |
| | ▪ Demote |
| | ▪ Archive |
| | ▪ Reports – Decision Tree Statistics |
| | • **Revision History** – A list of revisions will be available |
| | ○ Click on a Revision in the list |
| | ▪ 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 | In addition to the Options icon, you can select the **View Report** icon which opens the Email Statistics Report |