

MARQUIS

DMX312	Published Menu Options 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	Select the “Published” tab, top bar
Step 4	To narrow down by email type, click on the middle drop-down arrow in the box and click on the desired type of email

The screenshot shows the DocuMatix interface. On the left is a navigation menu with 'Email Manager' selected. The main content area shows the 'Emails' section with tabs for 'Defining', 'Submitted', 'Published', and 'Completed'. The 'Published' tab is active. Below the tabs is a search bar with 'All Email Types' and '- Unfiled -' dropdown menus. A red arrow points to the middle dropdown arrow. Below the search bar is a table of email entries:

Name	Description	Email Type	Launched Date
Welcome!	New member welcome email	Editor	8/1/2018
Student Savings Account	Student Savings Account email	Editor	8/3/2018

Step 5	To access a specific folder, click on drop-down arrow to the far right and select the desired folder
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This screenshot is identical to the previous one, but the red arrow points to the rightmost dropdown arrow in the search bar, indicating the next step in the process.

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Step 6	Under the “ Published ” click on the email name
6.1	A Menu box will pop up
	<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"> • Edit Details - Changes can be made to the campaign name and description
	<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"> ○ Preview On Desktop ○ Preview On Mobile ○ Send Sample ○ Spam Content Check ○ Email Client Preview
	<ul style="list-style-type: none"> • Data Upload Summary
	<ul style="list-style-type: none"> • Reports - specific to the email selected <ul style="list-style-type: none"> ○ Email Statistics ○ CTR (Click Through Rate) Heat Map ○ Create Push Report
	<ul style="list-style-type: none"> • Launch Details
	<ul style="list-style-type: none"> • Move to Folder - move email to another folder