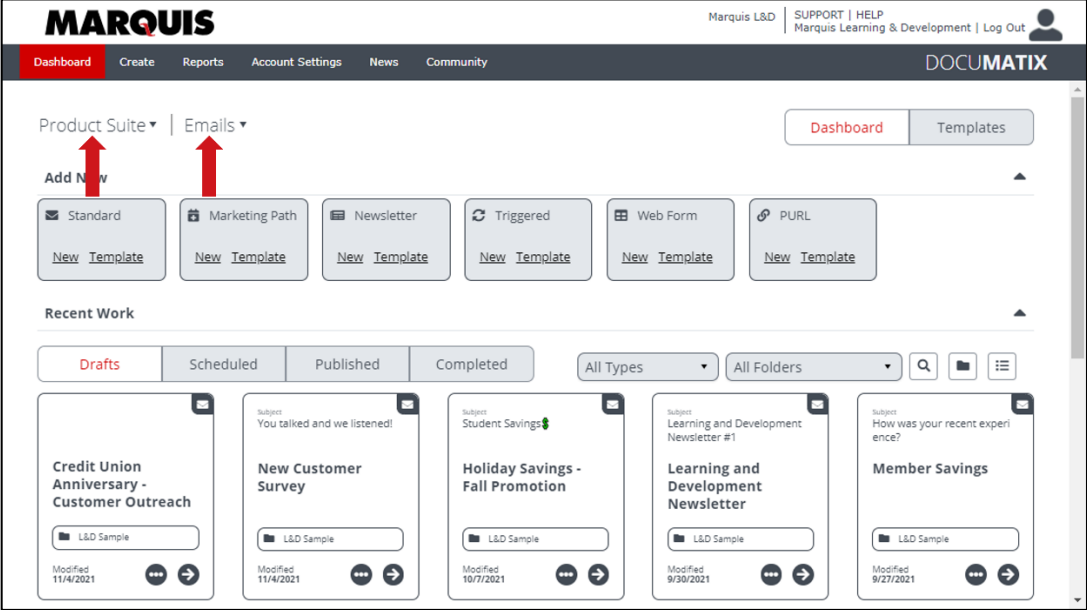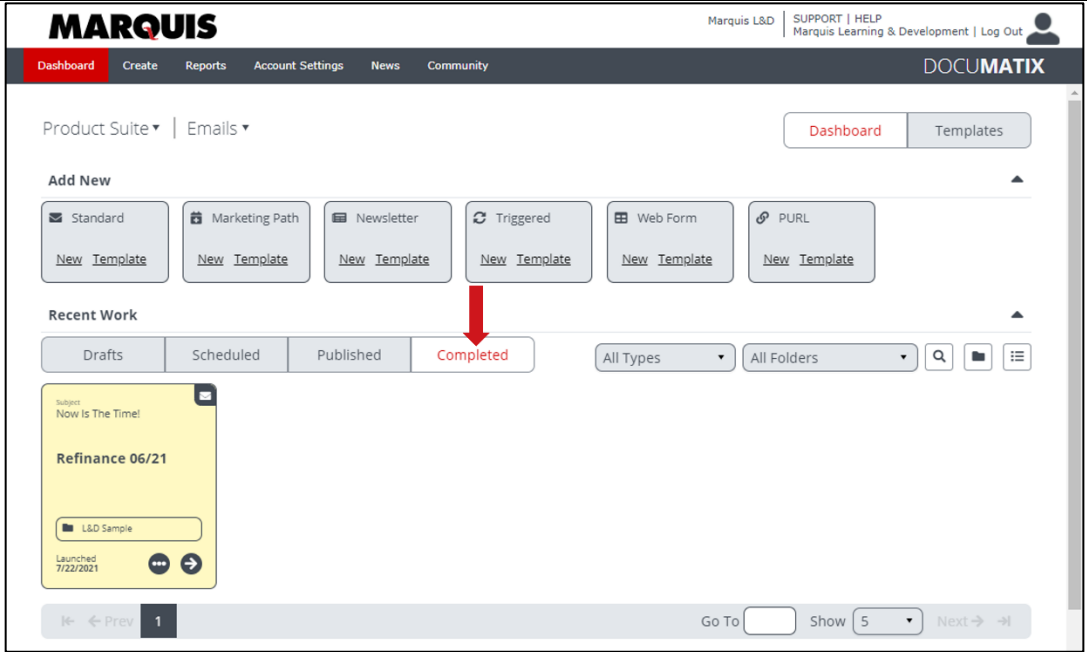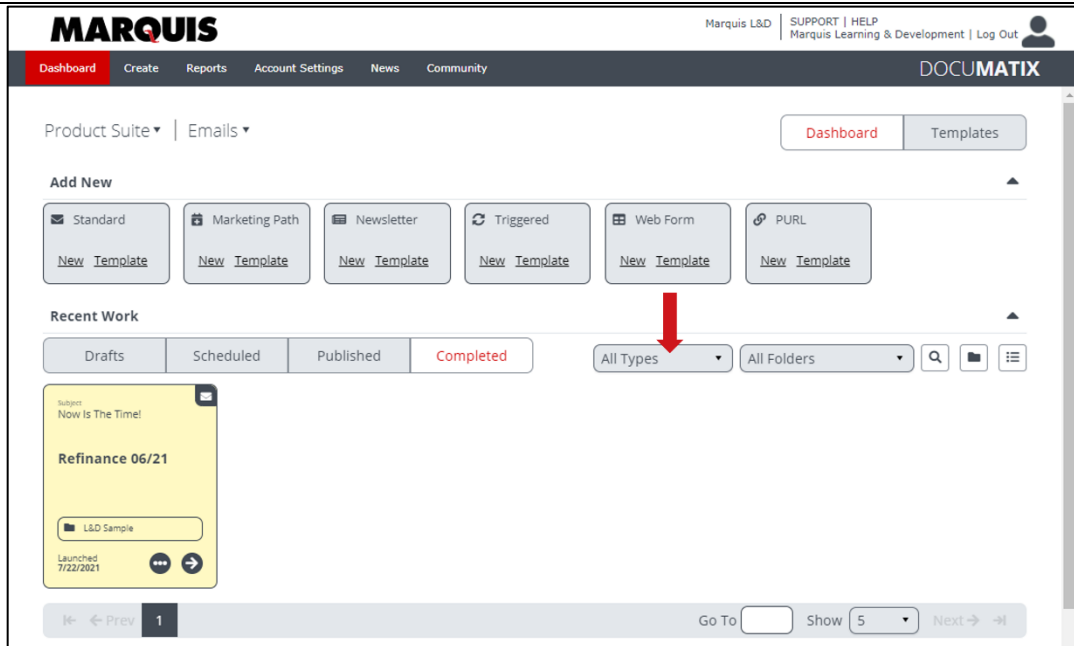# MARQUIS

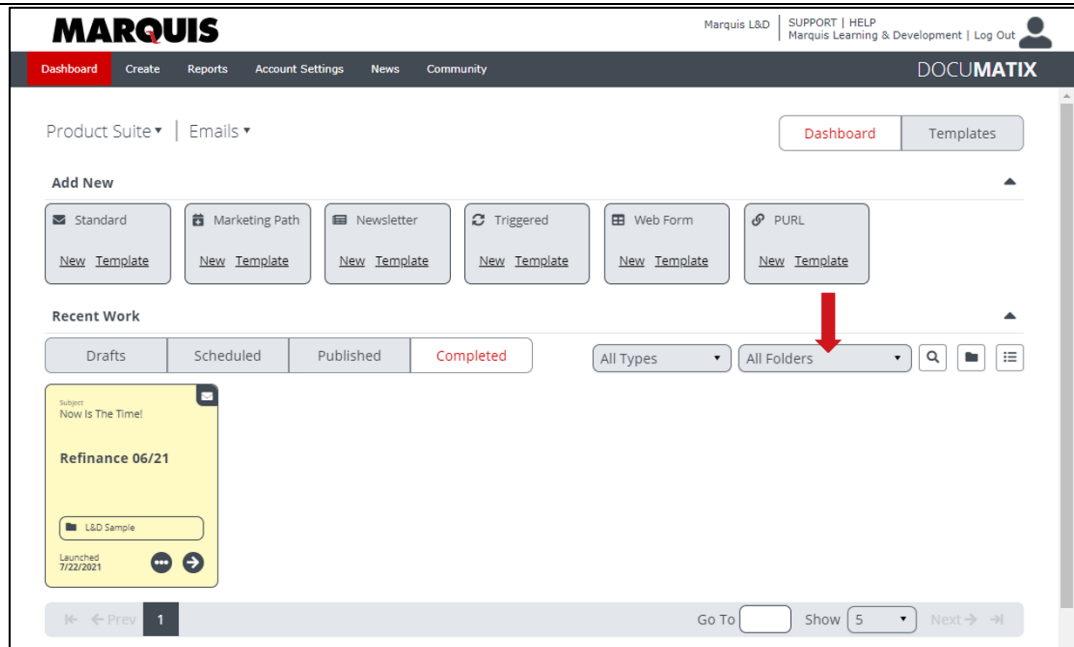| DMX313	Completed Actions for Emails
	This step-by-step process provides an overview of all actions available under the **Completed** tab in the **Recent Work** section of the **Dashboard**.
Order of Steps	**Tasks**
Step 1	Log into **DocuMatix**
Step 2	Select the **Product Suite** product and the **Emails** module
Step 3	Click the **Completed** tab

MARQUIS

Note: The system defaults to not archive emails so they'll remain in Published. If archiving is desired, the selection will need to be defined within Account Settings – Email Settings. All emails in the completed section will no longer be tracked for reporting within 45 days.	
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

MARQUIS

Step 6	Under **Completed**, 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 tap
	• **Edit Details** - Changes can be made to the detail page
	• **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
	• **Data Upload Summary**
	• **Reports** – specific to the email selected
	○ Email Statistics
	○ CTR (Click Through Rate) Heat Map
	○ Create Scheduled Report
	• **Launch Details**
	• **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