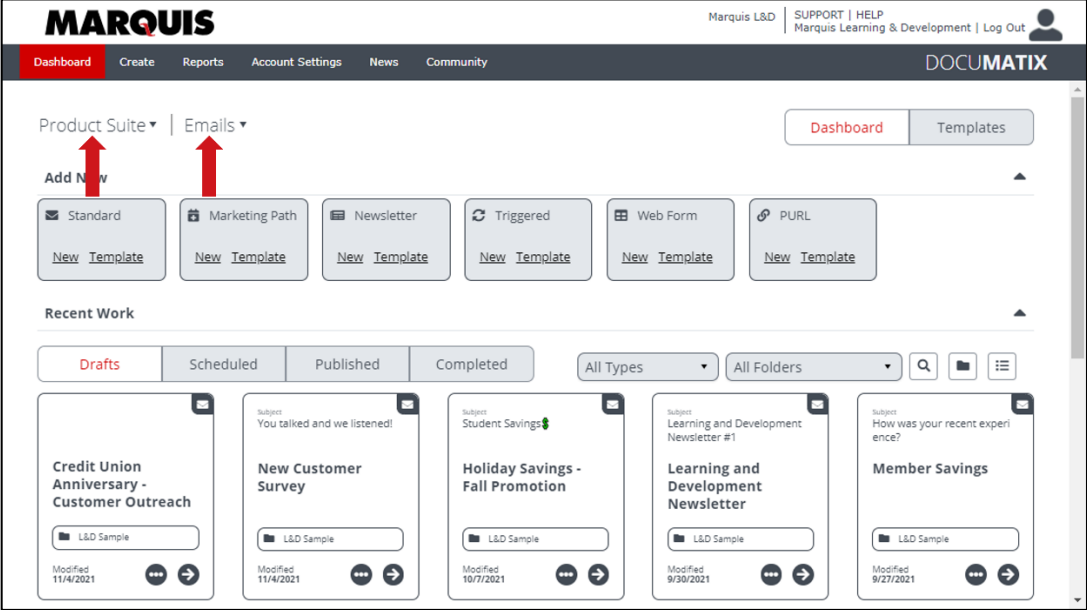
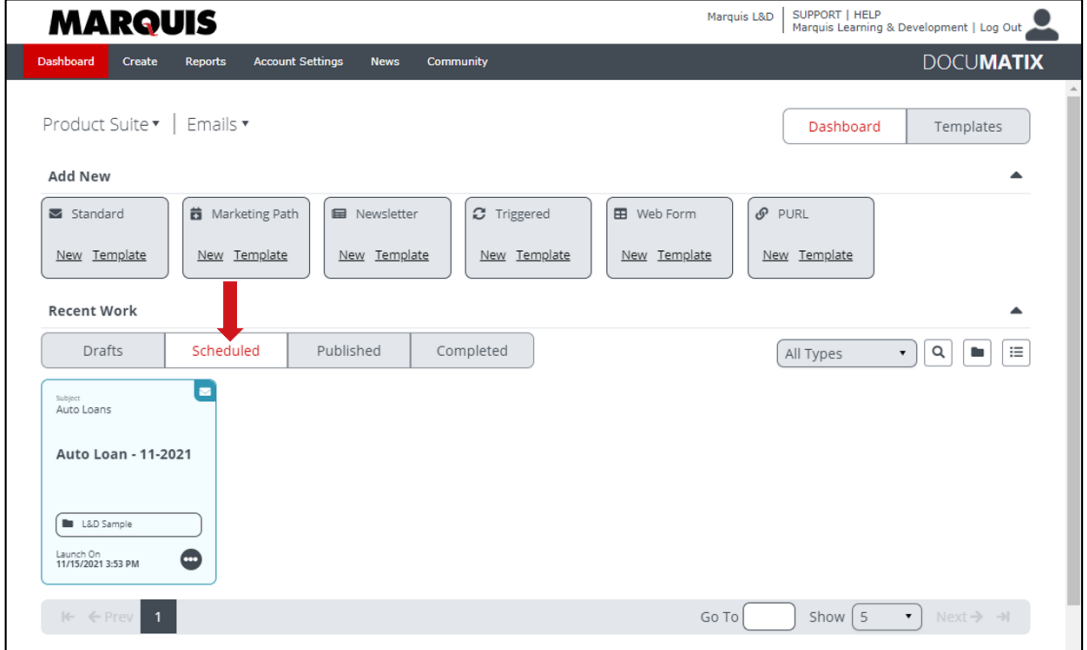
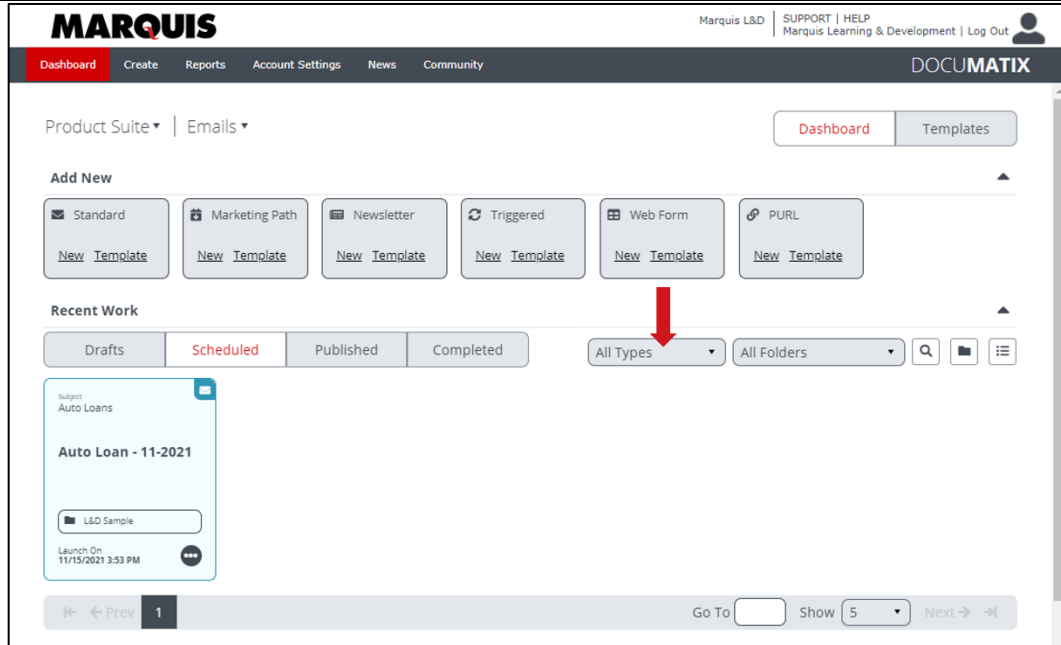


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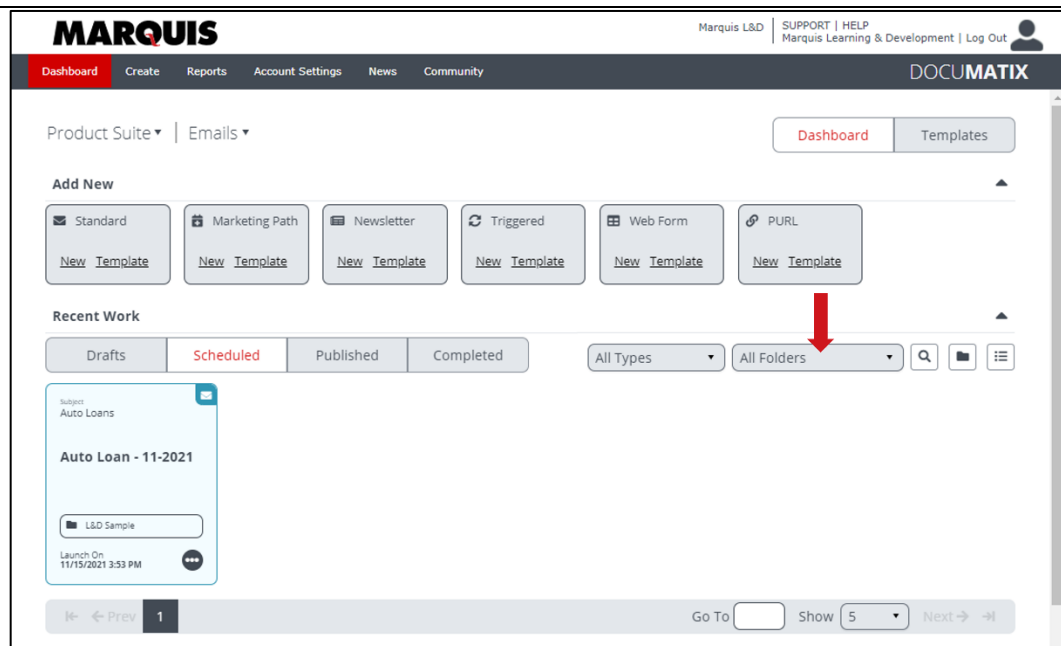
DMX314	Scheduled Actions for Emails
	This step-by-step process provides an overview of all actions available under the Scheduled tab in the Recent Work section of the Dashboard .
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Email module
	 <p>The screenshot shows the Marquis Dashboard with the 'Emails' section active. The 'Product Suite' and 'Emails' dropdown menus are highlighted with red arrows. Below these are buttons for 'Add New' with various email types: Standard, Marketing Path, Newsletter, Triggered, Web Form, and PURL. The 'Recent Work' section shows a list of email drafts, including 'Credit Union Anniversary - Customer Outreach', 'New Customer Survey', 'Holiday Savings - Fall Promotion', 'Learning and Development Newsletter', and 'Member Savings'. The 'Scheduled' tab is not yet selected.</p>
Step 3	Click the Scheduled tab
	 <p>The screenshot shows the same Marquis Dashboard, but the 'Scheduled' tab in the 'Recent Work' section is now selected and highlighted with a red arrow. The 'Auto Loan - 11-2021' email draft is visible in the list. The 'Drafts' tab is no longer selected.</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



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Step 6	Under Scheduled , click the Options icon 
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 tap
	<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"> <ul style="list-style-type: none"> ○ Email Validation
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Preview On Desktop
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Preview On Mobile
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Send Sample
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Spam Content Check
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Email Client Preview
	<ul style="list-style-type: none"> • Data Upload Summary (this option will only display if part of the launch has gone out)
	<ul style="list-style-type: none"> • Demote (this option will only display if part of the launch has gone out)
	<ul style="list-style-type: none"> • Reports – (this option will only display if the highlighted email is staggered or A/B Split enabled where part of the launch has gone out)
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Email Statistics
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ CTR (Click Through Rate) Heat Map
	<ul style="list-style-type: none"> <ul style="list-style-type: none"> ○ Create Scheduled Report
	<ul style="list-style-type: none"> • Launch Details
	<ul style="list-style-type: none"> • Move to Folder – move email to another folder