## MARQUIS

| 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 | Tasks  |  |  |
| Steps    |  |  |  |
| Step 1   | Log into <b>DocuMatix</b>  |  |  |
| Step 2   | Select the <b>Product Suite</b> product and the <b>Email</b> module  |  |  |
|          | MARQUIS Marquis L&D SUPPORT   HELP Marquis Learning & Development   Log Out  |  |  |
|          | Dashboard         Create         Reports         Account Settings         News         Community         DOCUMATIX   |  |  |
|          |  |  |  |
|          | Product Suite  |  |  |
|          | Add Nev  |  |  |
|          | Standard 🛱 Marketing Path 🖬 Newsletter 🖸 Triggered 🖽 Web Form 🔗 PURL   |  |  |
|          | New Template         New Template         New Template         New Template         New Template   |  |  |
|          | Recent Work  |  |  |
|          | Drafts Scheduled Published Completed All Types   |  |  |
|          |  |  |  |
|          | Magent         Magent         Magent         Magent         Magent           You talked and we listened!         Student Savings         Langing and Development         Hadyen avery syour recent experimence   |  |  |
|          | Credit Union         New Customer         Holiday Savings -         Learning and         Member Savings           Anniversary -         Survey         Fall Promotion         Development         Image: Comparison of Co  |  |  |
|          | Customer Outreach Newsletter   |  |  |
|          | L&D Sample         L&D Sample         L&D Sample         L&D Sample           Modified         Modified         Modified         Modified         Modified   |  |  |
|          | Modified<br>11/4/2021         Modified<br>11/4/2021         Modified<br>9/30/2021         Modifie  |  |  |
| Step 3   | Click the <b>Scheduled</b> tab   |  |  |
|          | Marquis L&D SUPPORT   HELP<br>Marquis Learning & Development   Log Out   |  |  |
|          | Dashboard Create Reports Account Settings News Community DOCUMATIX   |  |  |
|          |  |  |  |
|          | Product Suite  |  |  |
|          | Add New  |  |  |
|          | Standard 🛱 Marketing Path 🖬 Newsletter 🖓 Triggered 🖽 Web Form 🔗 PURL   |  |  |
|          | New Template         New Template         New Template         New Template         New Template   |  |  |
|          | Recent Work  |  |  |
|          | Drafts Scheduled Published Completed   |  |  |
|          |  |  |  |
|          | Auto Loans   |  |  |
|          | Auto Loan - 11-2021  |  |  |
|          |  |  |  |
|          | Launch On  |  |  |
|          |  |  |  |
|          | Image: Weight of the second |  |  |
|          |  |  |  |

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| Step 5 To access a specific folder, click the All Folders drop-down arrow to the far right and selection of the famile is an ended in the famile is and the form in the famile is and the form in the famile is and the fa           | Step 4 | To narrow down by email type, click the <b>All Typ</b> | es drop-down arrow in the box and click                                    |
|--|--------|--|--|
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Folders drop down arrow to the far right and select the desired folder         Image: Step 5       To access a specific folder, click the All Fol  |        | on the desired type of email                           | Marquis L&D SUPPORT   HELP<br>Merginic La traction & Development   Log Out |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder  |        |  |  |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Wreak LD       Marketing Reth         Product Suffer       Emails*         Context Formality       Event Tonget         Wreak LD       Event Tonget         Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Product Suffer       Emails*         Event Tonget       Event Tonget         Event Tonget       Even   |        | Product Suite •   Emails •                             | Dashboard Templates  |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Wreak LDD       Wreak LDD         Product Suffer* Emails*       Wreak LDD         Wreak LDD       Wreak LDD <th></th> <th>Add New</th> <th></th>  |        | Add New  |  |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder:         Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder:  |        | Standard 🛱 Marketing Path 📾 Newsletter 🖸 Triggered     | Web Form   |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Margue Lange Control Theorem Control  |        | New Iemplate New Iemplate New Iemplate                 | New Iemplate   |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         MARQUIS       Margue Lamong Downlopment Liop Of Margue Lamong Downlo  |        | Recent Work  | •  |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Product Sulter       Marketing Path         New       Standard         Marketing Path       NewSeletter         New       Standard         New       New         Standard       New         New       Standard         New       Newsietter         New       Newsietter         New       Newsietter         New       Newsietter         New       New Scholest         New       New         New <th></th> <th>Drafts Scheduled Published Completed</th> <th>All Types   All Folders</th>  |        | Drafts Scheduled Published Completed                   | All Types   All Folders  |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Product Sulte*       Marketing Name         Image: Learn & Complete       Marketing Path         Image: Learn & Complete       Were image: Learn & Complete         Image: Learn & Marketing Path       Hevedetter         Image: Learn & Marketing Path       Hevedetter         Image: Learn & Marketing Path       Hevedetter         Image: Learn Base       Herketing Path         Image: Learn Base       Herketing Path <tr< th=""><th></th><th></th><th></th></tr<>  |        |  |  |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Product Suite *       Emails *         Very Emails *       Very Emails *         Very Emails *       Very Emails *         New Emails *  |        | Auto Loan - 11-2021                                    |  |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Marquis LD       Marquis LD       Support   HEP         Product Suite*       Emails*       Doshboard         Product Suite*       Emails*       New Temolate         New Temolate       New Temolate       New Temolate         New Temolate       New Temolate       New Temolate         Image: Loose       New Temolate       New Temolate   |        | The LED Sample   |  |
| Step 5       To access a specific folder, click the All Folders drop-down arrow to the far right and select the desired folder         Marquis LaD       Support   HEP         Product Suite*   Emails*       DOCUMATIX         Product Suite*   Emails*       New Template         Marguis Landard       New Template         New Template  |        | Launch On<br>11/15/2021 3-33 PM                        |  |
| select the desired folder  |        | l← ← Prev 1  | Go To Show 5 ● Next → →  |
| select the desired folder  |        | _  |  |
| Marquis LaD SUPPORT   HLP<br>Marques Learning & Development   Log OL Quit<br>Deakboard Create Reports Account Settings News Community<br>Product Suite V Emails V<br>Add New<br>Standard Marketing Path<br>New Template New Template New Template New Template<br>Recent Work<br>Drafts Scheduled Published Completed All Types All Folders Q I III<br>Market Loan - 11-2021<br>Market In Support   HLP<br>Marquis Lazning & DOCUMATIX<br>DOCUMATIX<br>Documatic<br>Marquis Lazning & Documatic<br>Documatic<br>Documatic<br>Documatic<br>Documatic<br>Deakboard Templates<br>Mew Template New Template<br>New Template All Folders Q III Folders<br>Marquis Lazning & Documatic<br>Marquis Lazning & Documatic<br>Marquis Lazning & Documatic<br>Marquis Lazning & Documatic<br>New Template<br>Mew Template<br>Mew Template<br>Mew Template<br>Mew Template<br>Mew Template<br>Mew Template<br>Mew Template<br>Mew Template  | Step 5 | •  | drop-down arrow to the far right and                                       |
| Create Reports Account Settings News Community   Product Suite • Emails •   Product Suite • Emails •     Add New     Standard   Marketing Path   New Iemplate     New Iemplate </th <th></th> <th></th> <th>Marquis I RD SUPPORT   HELP</th>   |        |  | Marquis I RD SUPPORT   HELP  |
| Product Suite  Emails  Dashboard Templates  Add New  Standard New Template New Temp |        |  | Marquis Learning & Development   Log Out                                   |
| Add New Add New Template Auto Loans Auto Loan - 11-2021  |        |  | A  |
| Standard Marketing Path New Template       New Template     New Template       New Template     New Template       Published     Completed       All Folders     Q       Marketing Path New Template   |        | Product Suite ▼   Emails ▼                             | Dashboard Templates  |
| New Template New Template  |        |  |  |
| Recent Work  |        |  |  |
| Drafts Scheduled   Published Completed   All Types All Folders     Auto Loans     Auto Loan - 11-2021     LLO Sample   |        |  |  |
| Mage:     Image: Auto Loans       Auto Loan - 11-2021       Image: Lab Sample  |        | Recent WOIK  |  |
| Auto Loan - 11-2021  |        | Drafts Scheduled Published Completed                   | All Types   All Folders  Q  III  III  III                                  |
| LLO Semple   |        | Subject  | All Types   All Folders  Q  III  III                                       |
|  |        | Suspect<br>Auto Loans                                  | All Types   All Folders   Q  III  III                                      |
|  |        | Suspect<br>Auto Loans                                  | All Types   All Folders  |
| K+ ← Prev 1 Go To Show 5 • Next → →  |        | Auto Loan - 11-2021                                    | All Types  All Folders Q   |

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| Step 6 | Under <b>Scheduled</b> , click the <b>Options</b> icon   |
|--------|--|
| 6.1    | A Menu box will pop up.  |
|        | • <b>Copy</b> – A duplicate of the email can be made and will show up in the Defining tap      |
|        | Save as Template – Email designs can be saved as Templates                                     |
|        | Merge Fields – A list of merged fields within the email  |
|        | Preview and Test   |
|        | o Email Validation   |
|        | <ul> <li>Preview On Desktop</li> </ul>   |
|        | <ul> <li>Preview On Mobile</li> </ul>  |
|        | <ul> <li>Send Sample</li> </ul>  |
|        | <ul> <li>Spam Content Check</li> </ul>   |
|        | <ul> <li>Email Client Preview</li> </ul>   |
|        | • Data Upload Summary (this option will only display if part of the launch has                 |
|        | gone out)  |
|        | • <b>Demote</b> (this option will only display if part of the launch has gone out)             |
|        | • <b>Reports</b> – (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> <li>Email Statistics</li> </ul>   |
|        | <ul> <li>CTR (Click Through Rate) Heat Map</li> </ul>  |
|        | <ul> <li>Create Scheduled Report</li> </ul>  |
|        | Launch Details   |
|        | Move to Folder – move email to another folder  |