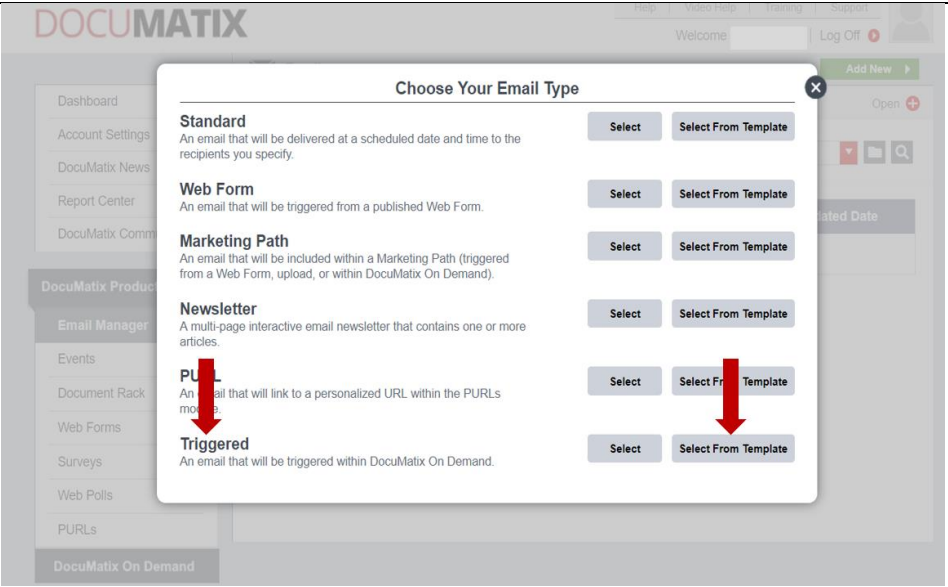
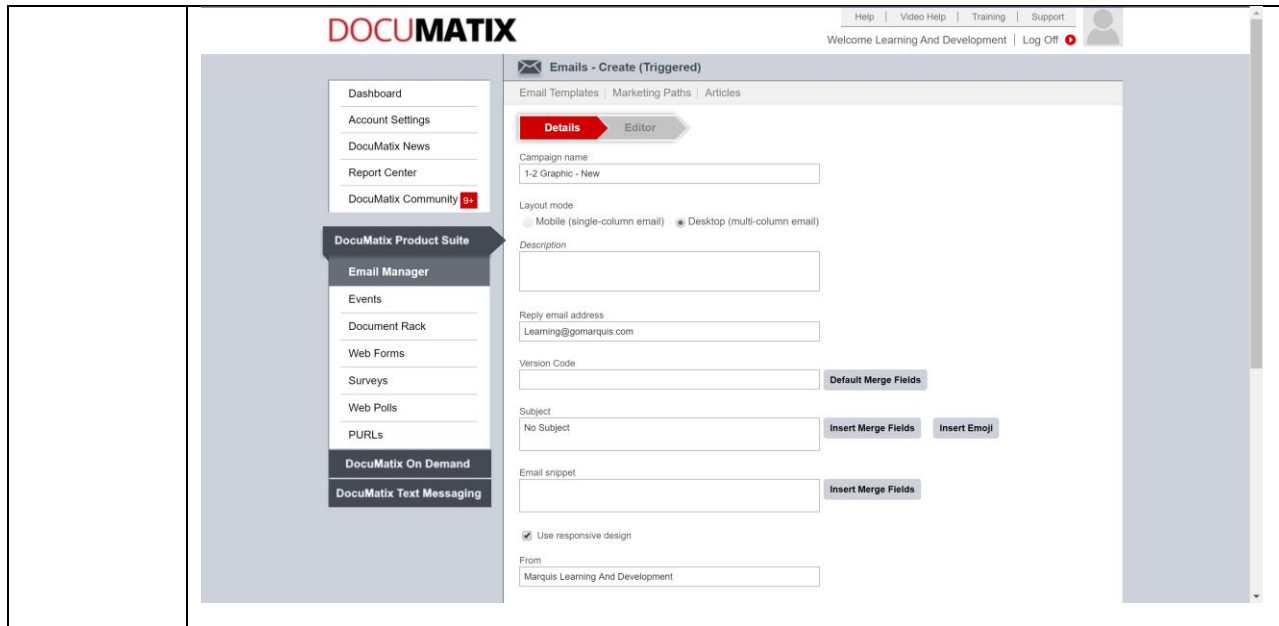


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DMX329	Creating a Triggered Email Using a Layout
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Click on “Email Manager” on left side of the menu
Step 3	Click on the green “Add New” button in the top right of the page
Step 4	Under Triggered click on “Select From Template”
	
Step 5	Choose a Template box pops up, click on “DocuMatix Layouts”
Step 6	Choose a Layout, by hovering over the selection and clicking on “Select”
Step 7	Complete or make modifications to the “Detail” page
Note: Anything in italics is an optional field as noted below. Some of the fields will auto populate from Account Settings.	
	<ul style="list-style-type: none"> • Campaign name • Layout Mode
Note: Mobile Layout Mode is for a single column email making it easier to view on a mobile device and Desktop Layout Mode allows for multi-column emails for viewing on a computer.	
	<ul style="list-style-type: none"> • Description (optional) • Reply email address • Version Code, if needed “Default Merge Fields” • Subject, if needed “Insert Merge Fields” and “Insert Emoji” • Email snippet (optional), if desired “Insert Merge Fields” • Use responsive design • From • Place in folder
7.1	Click on “Next”

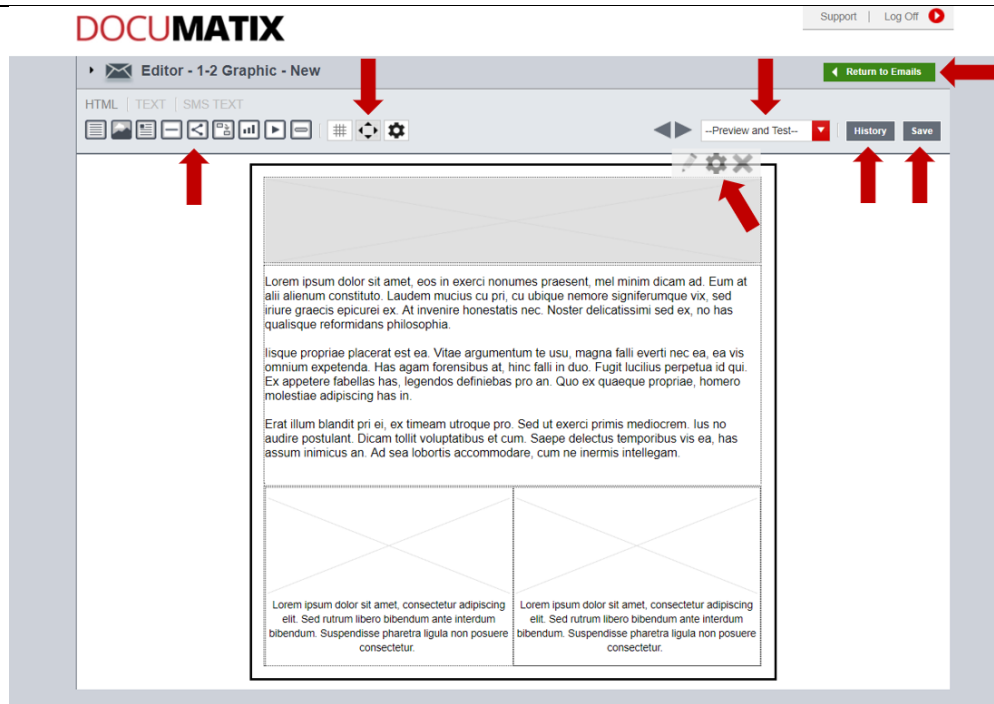
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Step 8	To add, remove or edit content to the layout, hover over each cell to Edit , change Settings , and Delete
	Edit – This will allow the ability to add text to a text cell and add an image to an image cell.
	Settings
	Delete
Step 9	To make adjustments or add additional cells to the template structure just select an icon that corresponds to the function desired by “Click, Drag, and Drop” the icon into or to move around the body of the email being created
	<ul style="list-style-type: none"> Text
	<ul style="list-style-type: none"> Image
	<ul style="list-style-type: none"> Text and Image
Note: When utilizing an IMAGE within the email, the Alt Text will need to contain text that describes what the image represents as it is used when emails are viewed through a viewing impaired app.	
	<ul style="list-style-type: none"> Divider
	<ul style="list-style-type: none"> Social
	<ul style="list-style-type: none"> Copy Cell From Other Email
	<ul style="list-style-type: none"> Web Polling
	<ul style="list-style-type: none"> Video
	<ul style="list-style-type: none"> Button
9.1	Click and adjust email parameters as needed
	<ul style="list-style-type: none"> Grid Lines
	<ul style="list-style-type: none"> Resized
	<ul style="list-style-type: none"> Settings
Step 10	To select the preferred Preview and Test method, click the drop-down arrow for Preview and Test

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Step 11	Click on the preferred testing Method
Step 12	If a misstep was made and the changes need to be reset, click on the History button
Step 13	Click the drop-down arrow for Select a Version
Step 14	Click on a version to verify the settings
Step 15	Once the desired version is found, click Revert To This Version
Step 16	The system autosaves every minute but we recommend clicking on “Save” on the right side of the menu bar
Step 17	Click the green button “Return to Emails” to right corner of the page



Step 18	Within Email Manager , click on the specific Triggered Email
A Validate Email box will pop up. If any critical errors are found, they must be corrected before you can proceed. The critical errors will be flagged in red with directions on where to update or verify the settings.	
Step 19	If no critical errors are found, click Next
Step 20	Type in a Contact email address
Step 21	Click Submit
Step 22	Click Yes to the confirmation message