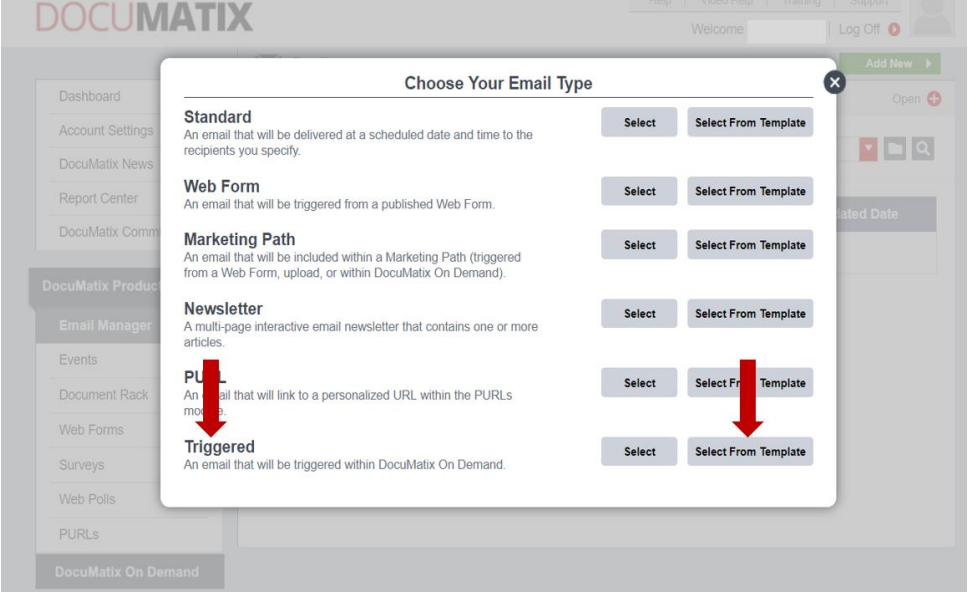
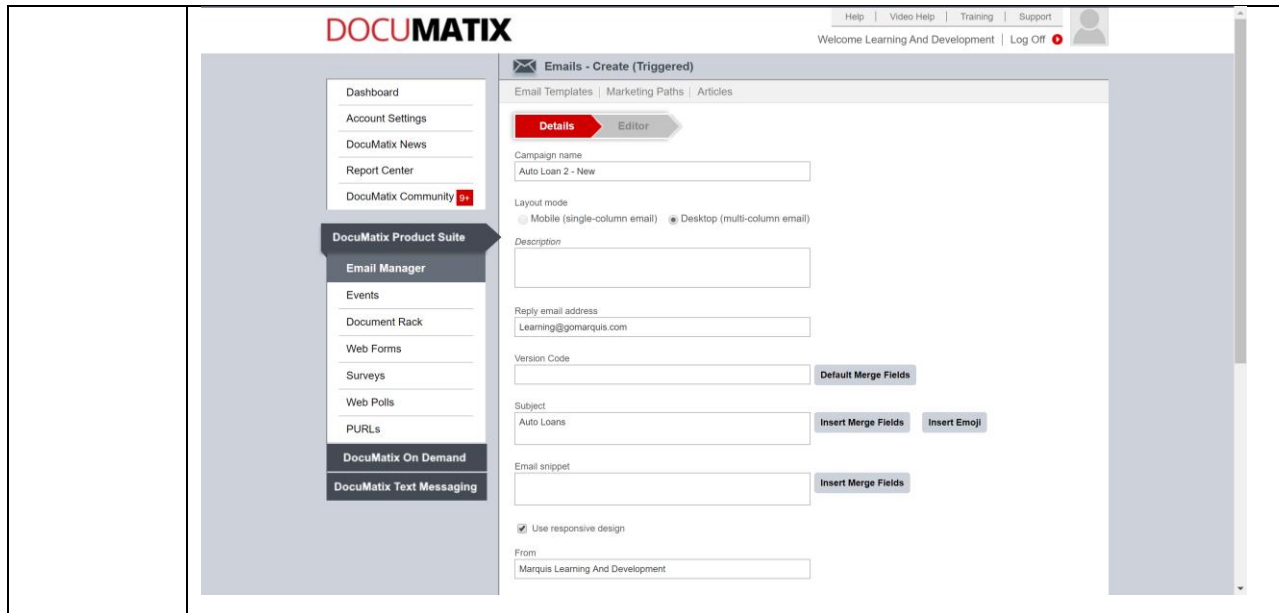














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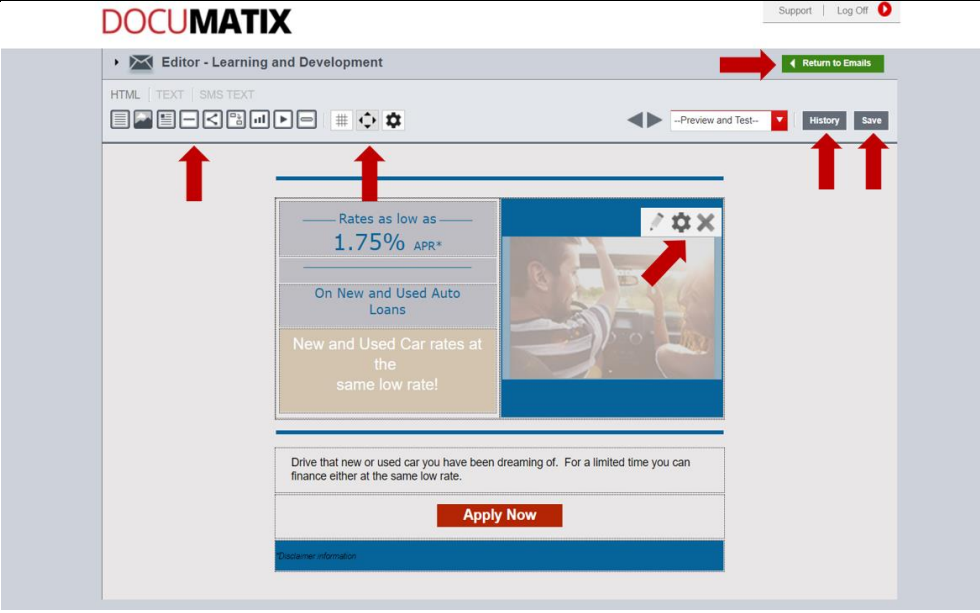
DMX330	Creating a Triggered Email Using a Template
Order of Steps	Tasks
Step 1	Log into <b>DocuMatix</b>
Step 2	Click on <b>“Email Manager”</b> on left side of the menu
Step 3	Click on the green <b>“Add New”</b> button in the top right of the page
Step 4	Under Triggered click on <b>“Select From Template”</b>
	
Step 5	Choose a Template box pops up, click on <b>“DocuMatix Templates”</b>
Step 6	Choose a template, by hovering over the selection and clicking on <b>“Select”</b>
Step 7	Complete or make modifications to the <b>“Detail”</b> page
<b>Note:</b> 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"> <li>• Campaign name</li> </ul>
	<ul style="list-style-type: none"> <li>• Layout Mode</li> </ul>
<b>Note:</b> 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"> <li>• Description (optional)</li> </ul>
	<ul style="list-style-type: none"> <li>• Reply email address</li> </ul>
	<ul style="list-style-type: none"> <li>• Version Code, if needed <b>“Default Merge Fields”</b></li> </ul>
	<ul style="list-style-type: none"> <li>• Subject, if needed <b>“Insert Merge Fields”</b> and <b>“Insert Emoji”</b></li> </ul>
	<ul style="list-style-type: none"> <li>• Email snippet (optional), if desired <b>“Insert Merge Fields”</b></li> </ul>
	<ul style="list-style-type: none"> <li>• Use responsive design</li> </ul>
	<ul style="list-style-type: none"> <li>• From</li> </ul>
	<ul style="list-style-type: none"> <li>• Place in folder</li> </ul>
7.1	Click on <b>“Next”</b>

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<b>Step 8</b>	To add, remove or edit the content in the template, hover over each cell to <b>Edit</b> , change <b>Settings</b> , and <b>Delete</b>
	✎ Edit – This will allow the ability to add text to a text cell and add/edit an image in an image cell.
	⚙ Settings
	✕ Delete
<b>Step 9</b>	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
	•  Text
	•  Image
	•  Text and Image
<b>Note:</b> When utilizing an IMAGE within the email, the <b>Alt Text</b> will need to contain text that describes what the image represents as it is used when emails are viewed through a viewing impaired app.	
	•  Divider
	•  Social
	•  Copy Cell From Other Email
	•  Web Polling
	•  Video
	•  Button
9.1	Click and adjust email paramiters as needed
	•  Grid Lines
	•  Resized
	•  Settings
<b>Step 10</b>	To select the preferred Preview and Test method, click the <b>drop-down arrow</b> for <b>Preview and Test</b>
<b>Step 11</b>	Click on the preferred testing Method

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<b>Step 12</b>	If a misstep was made and the changes need to be reset, click on the <b>History</b> button
<b>Step 13</b>	Click the <b>drop-down arrow</b> for <b>Select a Version</b>
<b>Step 14</b>	Click on a version to verify the settings
<b>Step 15</b>	Once the desired version is found, click <b>Revert To This Version</b>
<b>Step 16</b>	The system autosaves every minute but we recommend clicking on <b>“Save”</b> on the right side of the menu bar
<b>Step 17</b>	Click the green button <b>“Return to Emails”</b> to right corner of the page
	 <p>The screenshot shows the Documatix editor interface. At the top right, there is a 'Return to Emails' button. Below it, the editor toolbar includes 'History' and 'Save' buttons. The main content area displays a car loan advertisement with a settings icon in the top right corner. Red arrows indicate the locations of these key elements.</p>
<b>Step 18</b>	Within <b>Email Manager</b> , click on the specific Trigger Email
A <b>Validate Email</b> 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.	
<b>Step 19</b>	If no critical errors are found, click <b>Next</b>
<b>Step 20</b>	Type in a <b>Contact email address</b>
<b>Step 21</b>	Click <b>Submit</b>
<b>Step 22</b>	Click <b>Yes</b> to the confirmation message