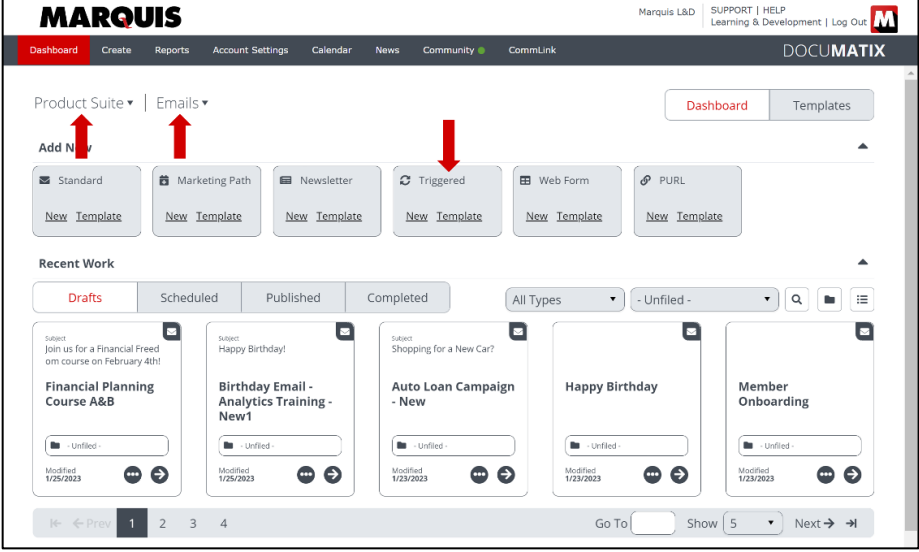

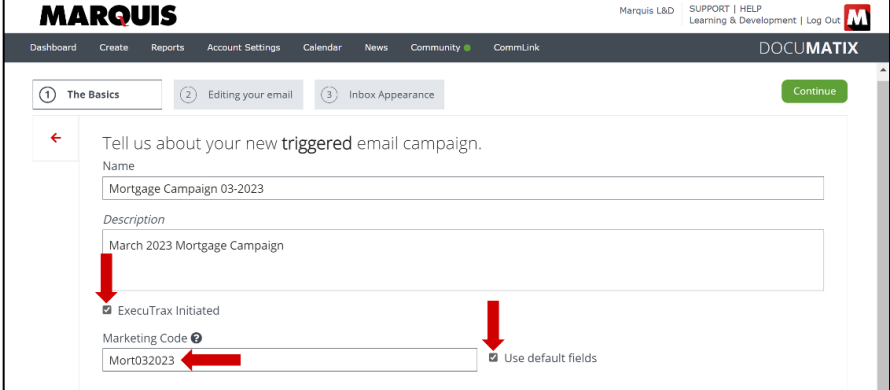


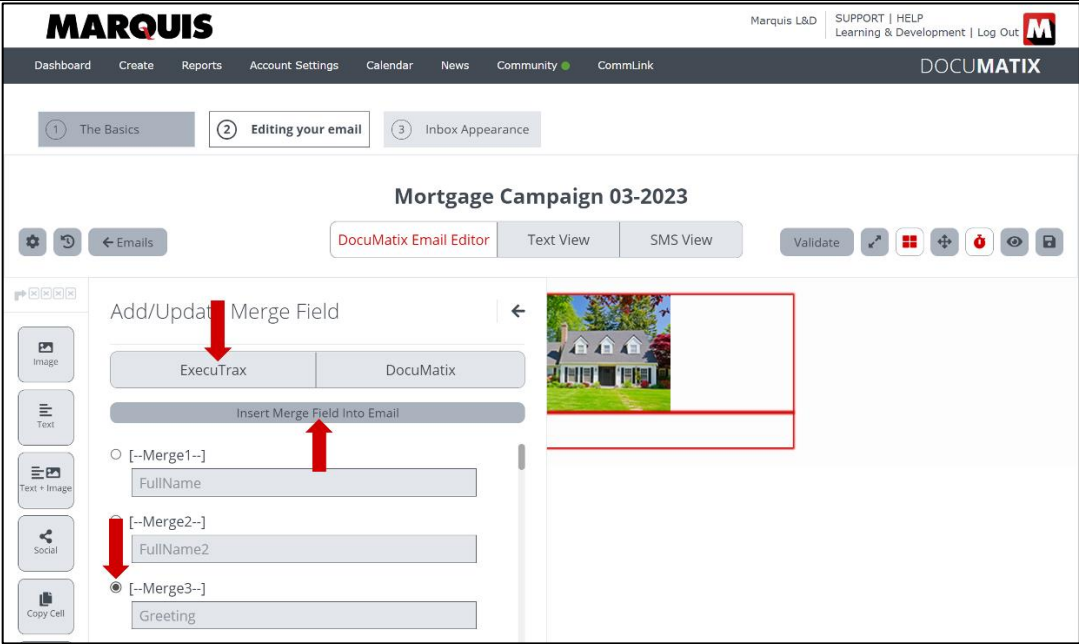


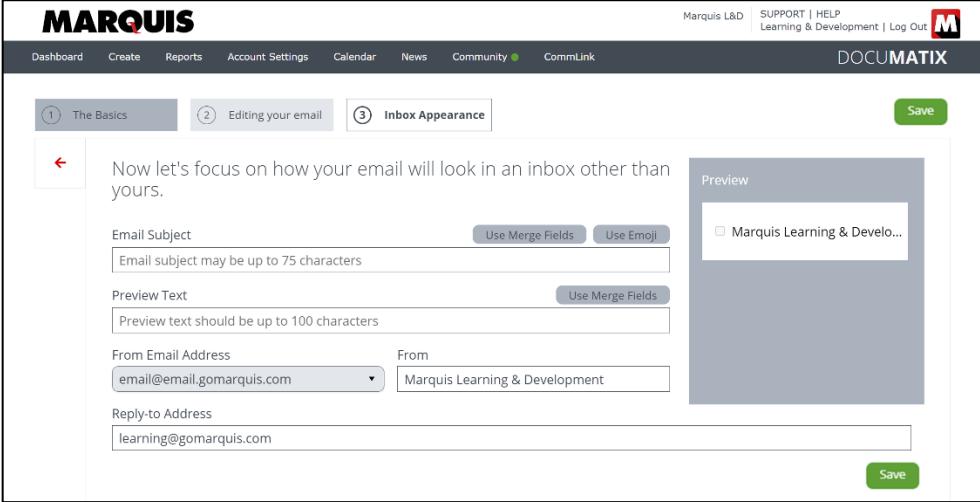

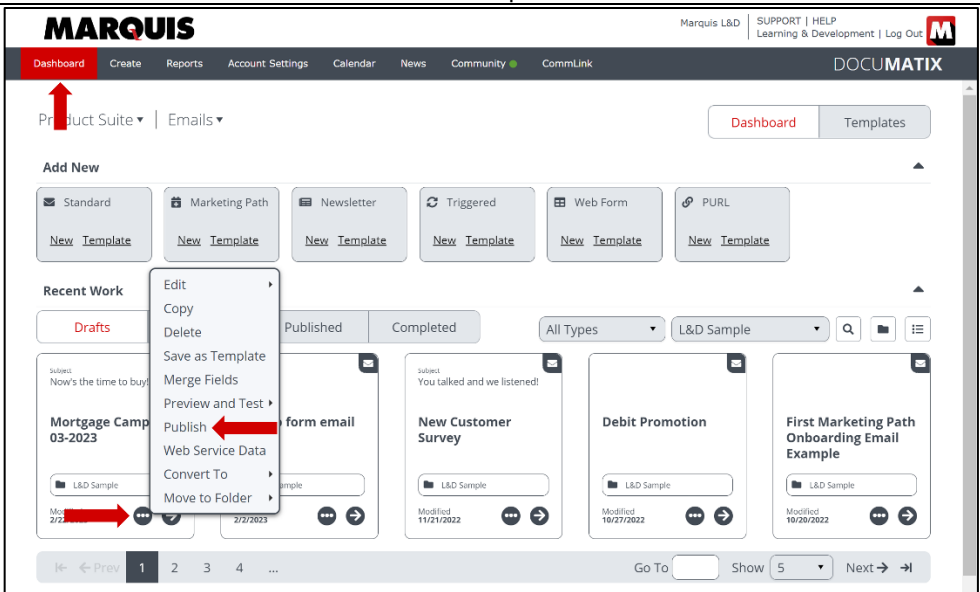
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DMX332	Building Triggered Emails With ExecuTrax Integration
	Use this step-by-step process to build triggered emails with ExecuTrax integration. For this integration to work, ExecuTrax must be on version 11.12 and Marquis must configure the system settings in advance. Contact your Relationship Manager for more information.
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Emails module
Step 3	Under the Add New section, create a new Triggered email. Click New to create the email from scratch, or click Template to use one of the pre-designed templates
	 <p>The screenshot shows the Marquis DocuMatix interface. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'Calendar', 'News', 'Community', and 'CommLink'. Below that, there's a 'Product Suite' dropdown menu with 'Emails' selected. Under 'Emails', there's an 'Add New' button and a grid of email types: Standard, Marketing Path, Newsletter, Triggered, Web Form, and PURL. Each type has a 'New' button and a 'Template' button. A red arrow points to the 'Add New' button, another red arrow points to the 'Emails' dropdown, and a third red arrow points to the 'Triggered' email type. Below the grid, there's a 'Recent Work' section with tabs for 'Drafts', 'Scheduled', 'Published', and 'Completed'. It shows several email cards with subjects like 'Financial Planning Course A&B', 'Birthday Email - Analytics Training - New1', 'Auto Loan Campaign - New', 'Happy Birthday', and 'Member Onboarding'. At the bottom, there's a pagination bar with 'Go To', 'Show 5', and 'Next'.</p>
<p>Note: In order to launch ExecuTrax Campaigns directly in DocuMatix, the email in DocuMatix must be a Triggered email. If you have already built an email for this ExecuTrax Campaign that is not a Triggered email, click the ellipsis icon , hover over Convert To, and click Triggered Email.</p>	
Step 4	Complete the The Basics page.
4.1	Give the email a unique Name
4.2	Optionally, provide a Description
4.3	Select the ExecuTrax Initiated checkbox
4.4	Provide a unique Marketing Code which will also be used in ExecuTrax to link this email
4.5	If inserting merge fields from ExecuTrax, select the Use default fields checkbox
	 <p>The screenshot shows the 'The Basics' form in the Marquis DocuMatix interface. It has three steps: 'The Basics', 'Editing your email', and 'Inbox Appearance'. The 'The Basics' step is active. The form asks for 'Name' (Mortgage Campaign 03-2023) and 'Description' (March 2023 Mortgage Campaign). There's a checkbox for 'ExecuTrax Initiated' which is checked. Below that is a 'Marketing Code' field with the value 'Mort032023'. At the bottom, there's a checkbox for 'Use default fields' which is also checked. Red arrows point to the 'ExecuTrax Initiated' checkbox, the 'Marketing Code' field, and the 'Use default fields' checkbox.</p>

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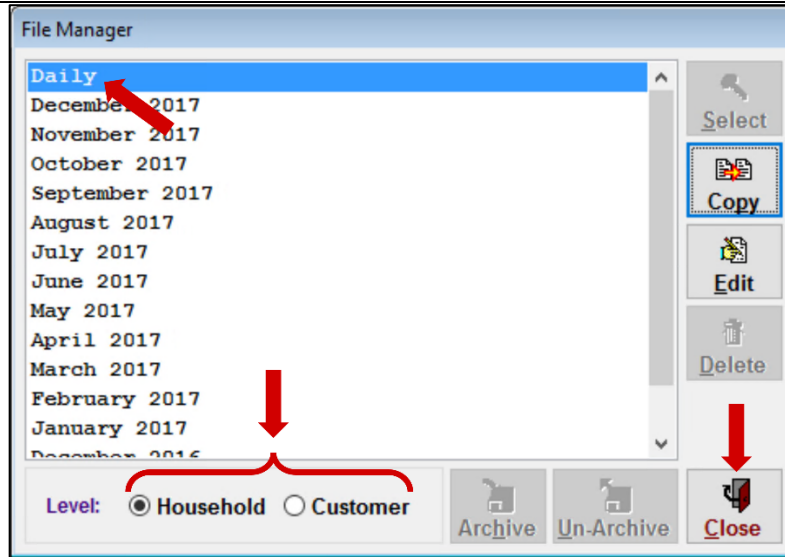
4.6	Optionally, Store your email in a folder to make it easier to locate later
4.7	Select whether you will use DocuMatix Editor or existing HTML to build the email
4.8	Select Layout mode: Mobile (single-column email) or Desktop (multi-column email)
4.9	Click Continue to advance to the Editing your email page
Step 5	Select the desired email element, and “Click, Drag, and Drop” the corresponding icon into the body of the email being created
Note: To get a detailed look at the process of building your email, please review the Building and Launching Emails eLearning module, or review the Getting Started Guide . Both of these resources are available within the Help Resources.	
Step 6	If merge fields from ExecuTrax are to be used, hover over the desired text cells and click the edit button 
6.1	Click Insert Merge Field button 
6.2	Under the ExecuTrax tab, click the radio dial of the desired merge field
Note: If the ExecuTrax tab is not visible, return to The Basics and select the Use default fields checkbox.	
6.3	Click Insert Merge Field Into Email
	
Note: To address the recipient by first name, select [-Merge3-] Greeting . This populates the first name from the Name1 field in ExecuTrax.	
Step 7	Continue building the email by repeating steps 5 and 6 until it is complete
Step 8	Click the Inbox Appearance in the top center of the page

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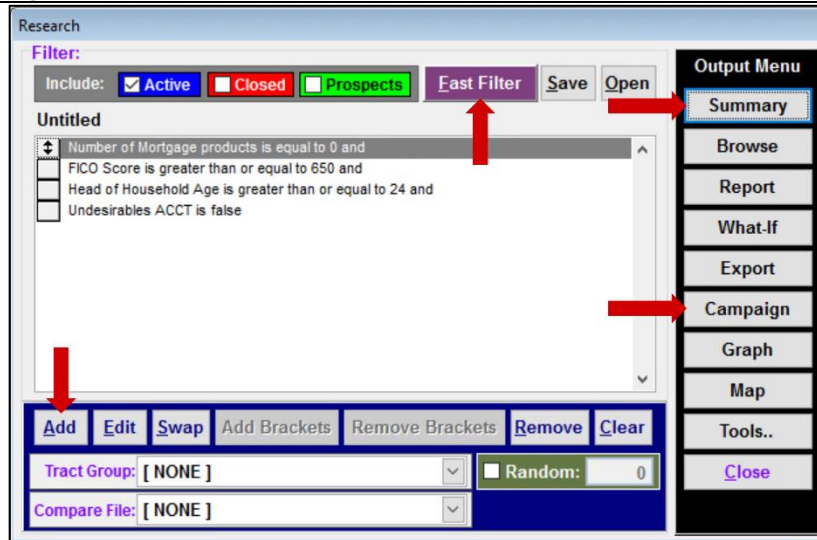
Step 9	Complete the Inbox Appearance page
	<ul style="list-style-type: none"> Email Subject, if needed Use Merge Fields and Use Emoji
	<ul style="list-style-type: none"> Preview Text, if needed Use Merge Fields
	<ul style="list-style-type: none"> From
	<ul style="list-style-type: none"> Reply-to Address
Step 10	Click Save or Update (the button says Update if editing an email that was previously created)
	
Step 11	Click the Dashboard tab in the top left
Step 12	Find the email in the Drafts folder, click the ellipsis icon  , and click Publish
	
12.1	Complete the Email Validation process. If any critical errors appear, return to the email editor, and correct them
12.2	Click Next
12.3	Enter Notification email address . This email will receive notifications when the email is published
12.4	Click Publish

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12.5	Click Yes for the confirmation message
Step 13	Log into ExecuTrax
Step 14	Click the File menu and select Manager
14.1	Select the Daily file set
14.2	Select whether you want to be on the Household or Customer/Member level
14.3	Click Close



Step 15	Click the Discovery menu and select Research
Step 16	Identify the desired marketing group by building a filter. Add as many filter conditions as needed
16.1	Click Add to create a filter condition using the 4-Step Filter Designer
16.2	Click Fast Filter to create a filter condition including the most commonly used fields
16.3	Select a Connector for filter conditions: And, Or, Join
Step 17	When your filter is built, click Summary to ensure it captures the desired marketing group
Step 18	Click Campaign

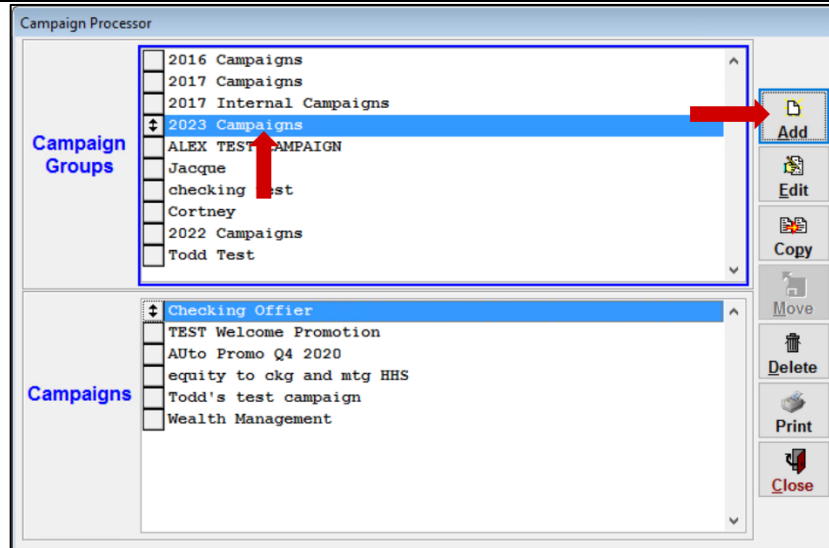


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Note: To get a detailed look at the process of building filters in ExecuTrax, please review the **Filtering** video which can be found on the **ExecuTrax Help Videos** tab of the Client Portal.

Step 19 Click the campaign group where the new campaign will be added. If a new campaign group is desired, click any of the campaign groups at random

Step 20 Click **Add**

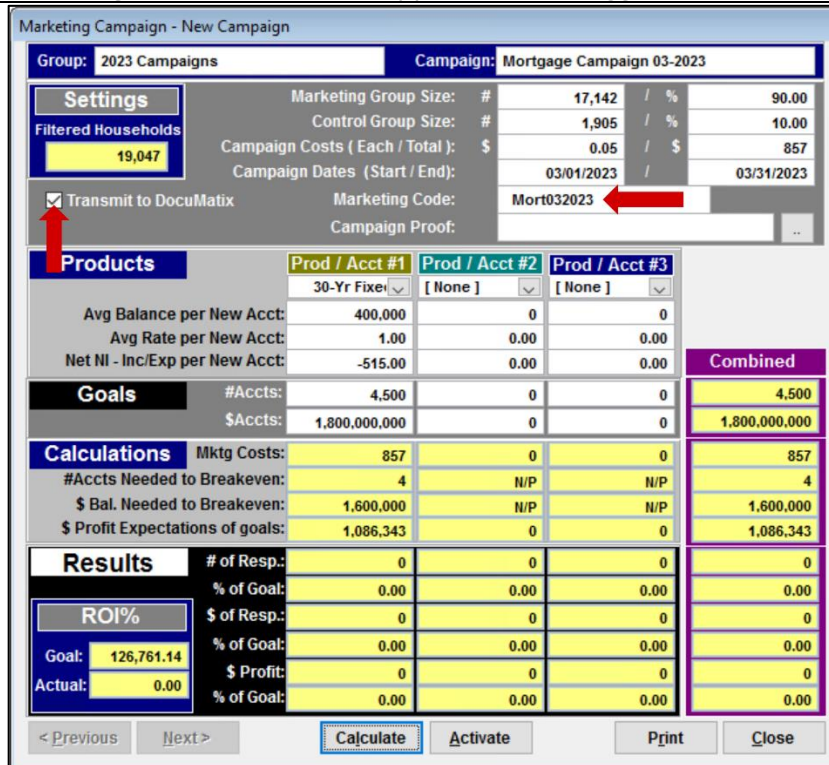


Step 21 Build the campaign like normal


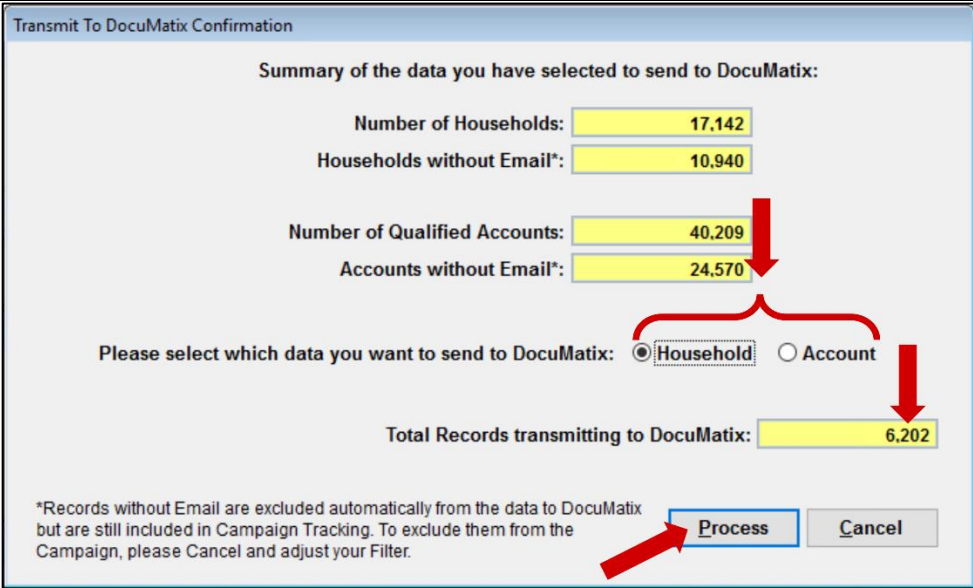
Note: To get a detailed look at the process of building campaigns in ExecuTrax, please review the **Campaigns** video which can be found on the **ExecuTrax Help Videos** tab of the Client Portal.

Step 22 Select the **Transmit to DocuMatrix** checkbox

Step 23 Enter the **Marketing Code** verbatim as it appears on the triggered email in DocuMatrix



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Note: To find the Marketing Code in DocuMatix, go to the Product Suite product and Emails module. In the Published folder, click the ellipsis icon  of the email, and select Edit Details . From here, you can copy the Marketing Code .	
Step 24	Optional: once all the campaign costs, estimates, and goals have been entered, click Calculate to see profit and ROI estimates
Step 25	Click Activate
Step 26	The system will identify the number of households or customers/members, and qualified accounts, and also those which are lacking an email. Select which data to send to DocuMatix: Household or Account . The system will identify the number of records it will transmit to DocuMatix (those which have emails)
Step 27	Click Process
	
Note: When clicking Process , the triggered email will be sent to all the selected records which contain emails in real time . Do not click Process until the desired time to send the email.	
If the Marketing Code does not match in ExecuTrax and DocuMatix, the message below will appear. If this occurs, edit the Marketing Code in ExecuTrax and/or DocuMatix, and ensure it matches in both places.	
	