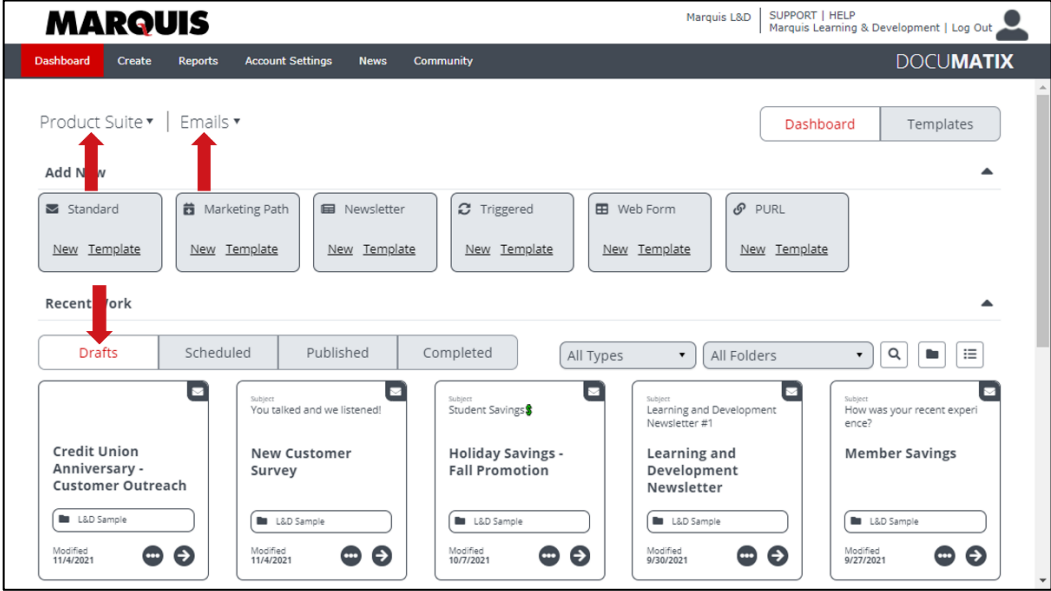
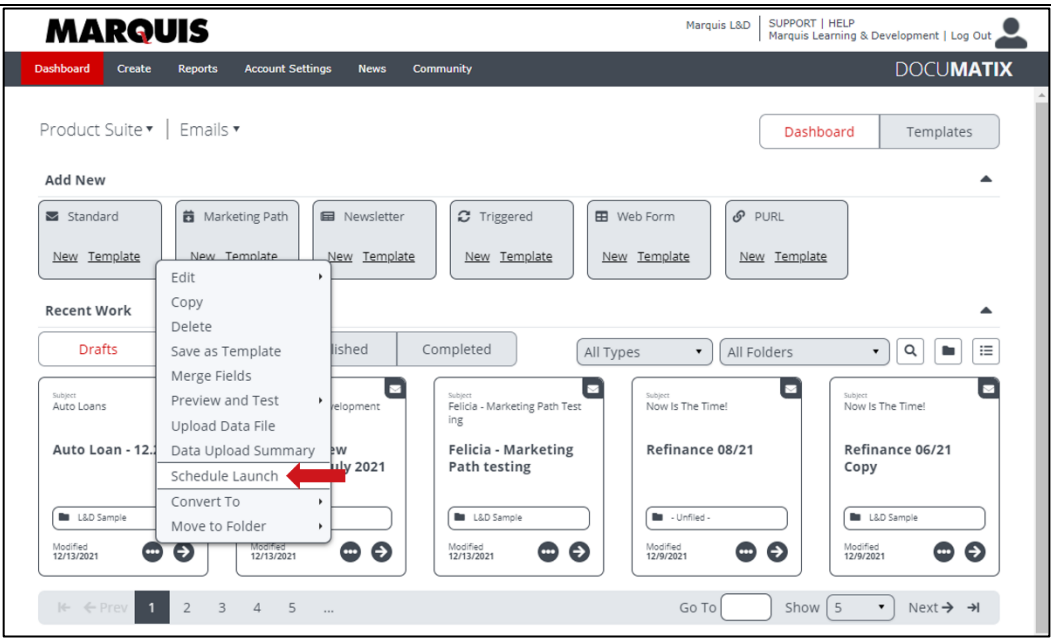


MARQUIS

DMX375	How to Schedule an Email Launch
	Use this document to schedule an email launch, after the email has been built and the CSV file has been added.
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Emails module
Step 3	Locate the desired email within the Drafts tab
	 <p>The screenshot shows the Marquis DocuMatix interface. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. Below that, 'Product Suite' and 'Emails' are selected. The 'Add New' section contains several email templates like 'Standard', 'Marketing Path', 'Newsletter', etc. The 'Recent Work' section has tabs for 'Drafts', 'Scheduled', 'Published', and 'Completed'. The 'Drafts' tab is active, showing a list of email cards. Red arrows in the original image point to 'Product Suite', 'Emails', and the 'Drafts' tab.</p>
Step 4	Click the Options icon (⋮) on the email card
Step 5	Click Schedule Launch
	 <p>This screenshot shows the same interface as the previous one, but with the 'Options' menu open for the first email card in the 'Drafts' list. The menu includes options like 'Edit', 'Copy', 'Delete', 'Save as Template', 'Merge Fields', 'Preview and Test', 'Upload Data File', 'Data Upload Summary', 'Schedule Launch', 'Convert To', and 'Move to Folder'. A red arrow points to the 'Schedule Launch' option.</p>

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Note: Validate the email content, including any critical errors, suggestions, images, and links. If errors are found, click **Close**, click the email on the **Drafts** tab, hover over **Edit**, and click **Editor**. From here locate the error(s) and correct them. Repeat **Step 5**.

MARQUIS Marquis L&D SUPPORT | HELP MARQUIS LEARNING & DEVELOPMENT | Log Out

Dashboard Create **Email Validation** X DOCUMATIX

Product Suite

Add New

- Standard
- New Template

Recent Work

Drafts

Name

New Auto Ca

0-30 Email-3

Refinance 06

Financial Plan

Back to Scho

← Pr

Close Next →

All critical errors must be resolved before launching this email.

Email name: Refinance 06-21 Re-Evaluate



Critical Errors (Must be resolved before sending)

Issue	Action
Alt text missing from 1 images	Please confirm that all images have alt text. This helps the email be ADA compliant. See images section below for specific images.


Suggestions (Not required before sending)

Issue	Action
No suggestions found	

Images

  https://marquist.documatix.com/images/cu/MOLe0/emails/MOLe0623202171022_0f9f7cd7856e45e6bdddcb8ae073f7cce.jpg?
Missing image alt text

Links

 <http://gomarquis.com/about-us/>

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Dashboard Create Reports Account Settings News Community **DOCUMATIX**

Product Suite | Emails Dashboard Templates

Add New

- Standard New Template
- Marketing Path New Template
- Newsletter New Template
- Triggered New Template
- Web Form New Template
- PURL New Template

Recent Work

Drafts

Visa Platinum 2021 Modified 11/16/2021

New Customer Survey Modified 11/4/2021

Holiday Savings - Fall Promotion Modified 10/7/2021

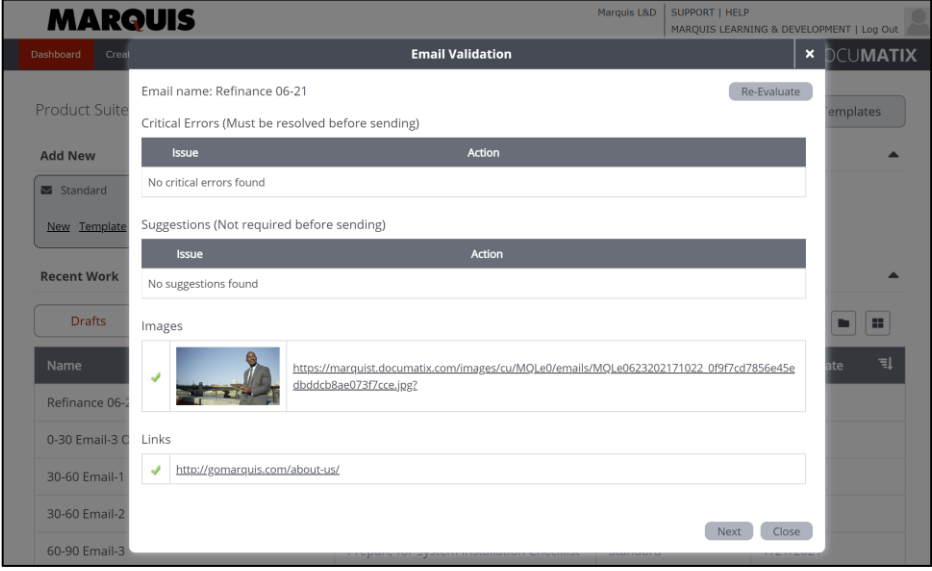
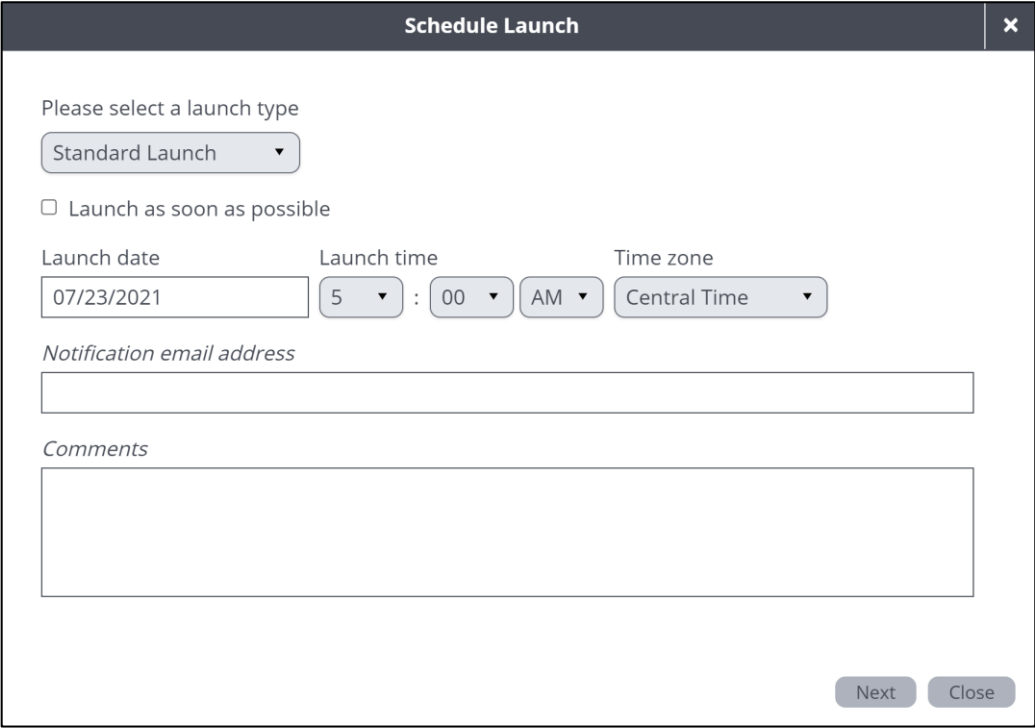
Learning and Development Newsletter #1 Modified 9/30/2021

Go To Show 5 Next

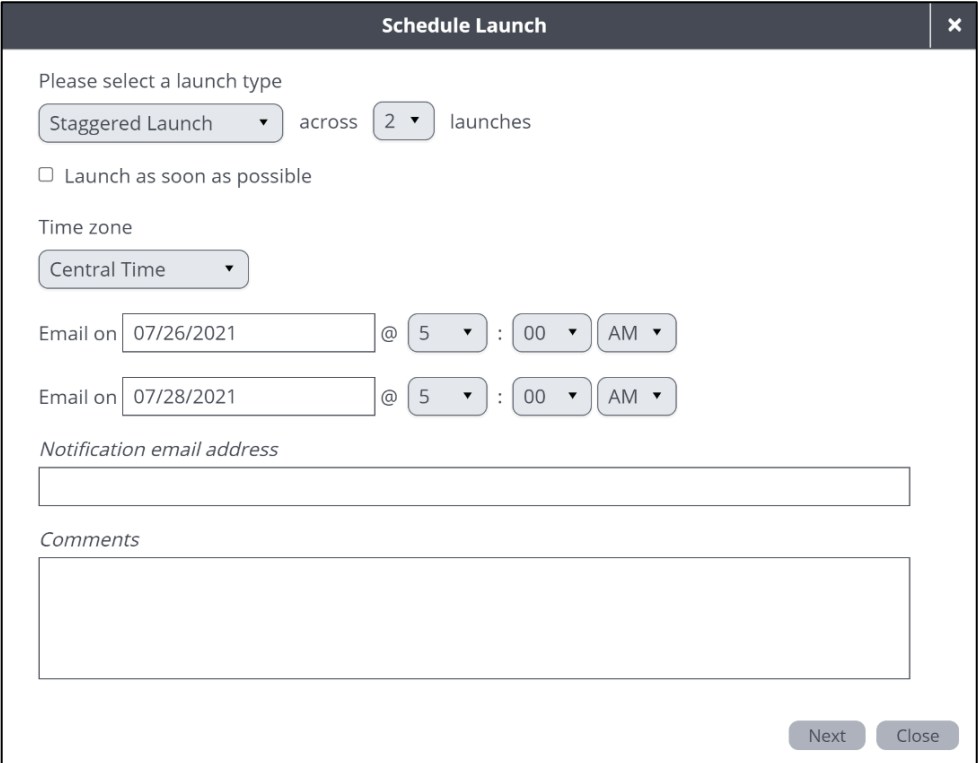
1 2 3 4 5 ...

Editor

MARQUIS

Step 6	When no errors are found, click Next
	
Step 7	Select the desired launch type:
7.1	Standard Launch: Email will be sent one time to each email address that is upload on the data list. Choose the date and time of delivery.
	

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7.2	Staggered Launch: Email will be sent one time to each email address that is uploaded on the data list. The delivery of the emails can be separated across 2 - 5 different launches, with the ability to select different launch days and times for each launch.
	 <p>The screenshot shows a 'Schedule Launch' dialog box with the following elements:</p> <ul style="list-style-type: none">Title bar: Schedule Launch (with a close button 'x')Text: Please select a launch typeLaunch type: Staggered Launch (dropdown)Text: across 2 (dropdown) launchesCheckbox: <input type="checkbox"/> Launch as soon as possibleText: Time zoneTime zone: Central Time (dropdown)Text: Email on 07/26/2021 @ 5 (dropdown) : 00 (dropdown) AM (dropdown)Text: Email on 07/28/2021 @ 5 (dropdown) : 00 (dropdown) AM (dropdown)Text: Notification email addressText input field for notification email addressText: CommentsText area for commentsButtons: Next, Close
7.3	A/B Split: Used to test two different subject lines to see which performs better. This option is only available if the upload list contains 1,000+ email addresses. Parameters are set as highest open rate or highest click-through rate .
Note: The A/B Split option must be selected during the launch of the email. The ability to provide the two subject lines is provided within the Inbox Appearance page or during the launch of the email.	

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Schedule Launch ✕

Please select a launch type

A/B Split ?

Launch as soon as possible

Launch date: 07/26/2021 Launch time: 5 : 00 Time zone: AM Central Time

Group A subject
Now Is The Time!

Group B subject
Record Low Interest Rates!

Final group subject chosen by: Test group with the highest open rate Launch final group: 2 hours after A/B test groups

Percent of email list to test
10% (5% to group A; 5% to group B)

Launch Group	Number of Emails
Group A	56
Group B	56
Final Group	998
Total	1,110

Notification email address

Comments

Next Close

Schedule Launch

Please select a launch type

A/B Split ?

Launch as soon as possible

Launch date: 07/26/2021 Launch time: 5 : 00 Time zone: AM Central Time

Group A subject
Now Is The Time!

Group B subject
Record Low Interest Rates!

Final group subject chosen by: Test group with the highest open rate Launch final group: 2 hours after A/B test groups

Test group with the highest open rate ←

Test group with the highest click-through rate ←

7.4 First, designate the subjects for Group A & Group B.

7.5 Use the drop down menus to determine how the subject will be chosen for the final group, when the final group will be launched, and the desired percent of email list to test.

Note: The final delivery with the winning subject line will automatically be completed by DocuMatix.

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7.6	Use the calendar tool to select the Launch Date , and select the Launch Time
7.7	Add a Notification Email Address and Comments , if desired

Schedule Launch [X]

Please select a launch type
A/B Split [?]

Launch as soon as possible

Launch date: 07/26/2021 Launch time: 5 : 00 AM Time zone: Central Time

Group A subject: Now Is The Time!

Group B subject: Record Low Interest Rates!

Final group subject chosen by: Test group with the highest open rate Launch final group: 2 hours after A/B test groups

Percent of email list to test: 10% (5% to group A; 5% to group B)

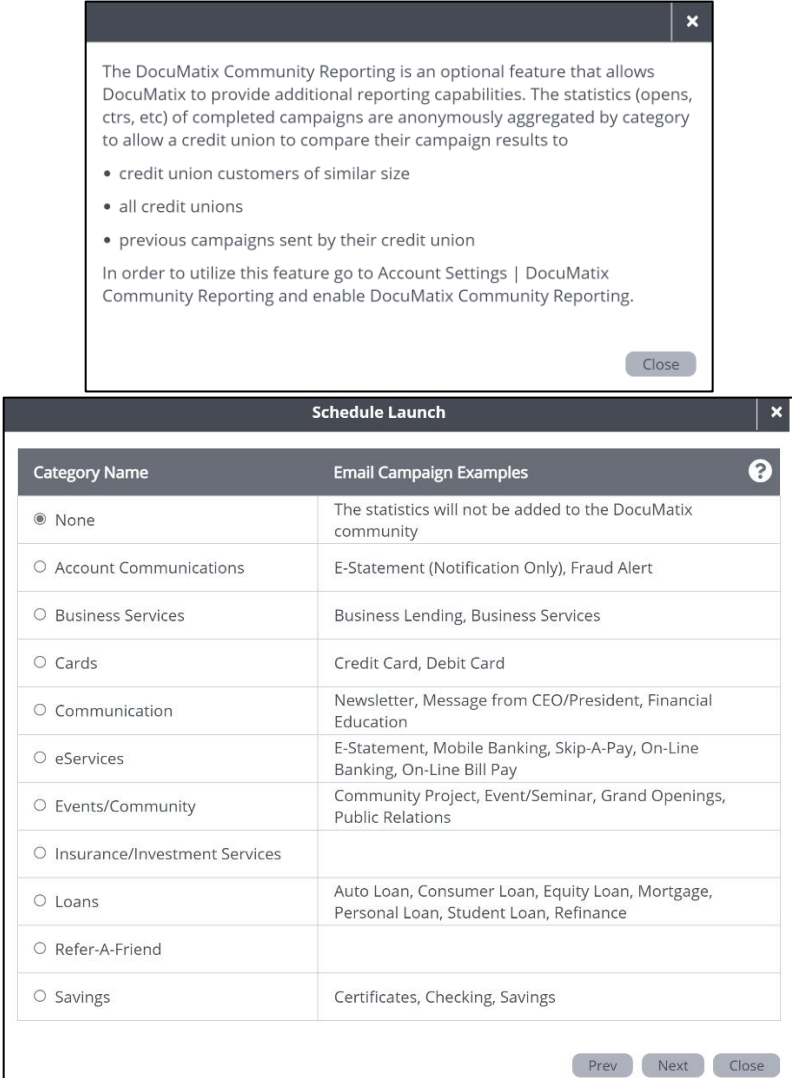
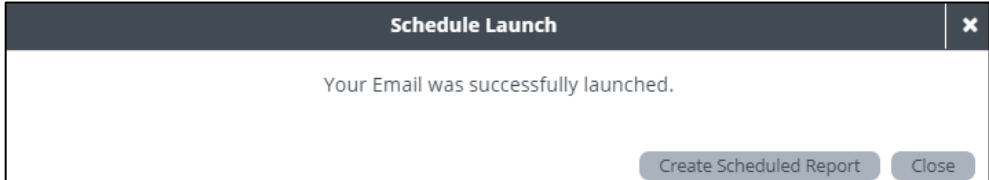
Launch Group	Number of Emails
Group A	56
Group B	56
Final Group	998
Total	1,110

Notification email address: []

Comments: []

Next Close

MARQUIS

Step 8	Click the desired category to provide a comparison against available peers																								
	<ul style="list-style-type: none"> Financial institution customers of a similar size 																								
	<ul style="list-style-type: none"> All financial institutions 																								
	<ul style="list-style-type: none"> Previous campaigns sent by your financial institution 																								
	 <p>The DocuMatix Community Reporting is an optional feature that allows DocuMatix to provide additional reporting capabilities. The statistics (opens, ctrs, etc) of completed campaigns are anonymously aggregated by category to allow a credit union to compare their campaign results to</p> <ul style="list-style-type: none"> credit union customers of similar size all credit unions previous campaigns sent by their credit union <p>In order to utilize this feature go to Account Settings DocuMatix Community Reporting and enable DocuMatix Community Reporting.</p> <p>Schedule Launch</p> <table border="1"> <thead> <tr> <th>Category Name</th> <th>Email Campaign Examples</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="radio"/> None</td> <td>The statistics will not be added to the DocuMatix community</td> </tr> <tr> <td><input type="radio"/> Account Communications</td> <td>E-Statement (Notification Only), Fraud Alert</td> </tr> <tr> <td><input type="radio"/> Business Services</td> <td>Business Lending, Business Services</td> </tr> <tr> <td><input type="radio"/> Cards</td> <td>Credit Card, Debit Card</td> </tr> <tr> <td><input type="radio"/> Communication</td> <td>Newsletter, Message from CEO/President, Financial Education</td> </tr> <tr> <td><input type="radio"/> eServices</td> <td>E-Statement, Mobile Banking, Skip-A-Pay, On-Line Banking, On-Line Bill Pay</td> </tr> <tr> <td><input type="radio"/> Events/Community</td> <td>Community Project, Event/Seminar, Grand Openings, Public Relations</td> </tr> <tr> <td><input type="radio"/> Insurance/Investment Services</td> <td></td> </tr> <tr> <td><input type="radio"/> Loans</td> <td>Auto Loan, Consumer Loan, Equity Loan, Mortgage, Personal Loan, Student Loan, Refinance</td> </tr> <tr> <td><input type="radio"/> Refer-A-Friend</td> <td></td> </tr> <tr> <td><input type="radio"/> Savings</td> <td>Certificates, Checking, Savings</td> </tr> </tbody> </table>	Category Name	Email Campaign Examples	<input checked="" type="radio"/> None	The statistics will not be added to the DocuMatix community	<input type="radio"/> Account Communications	E-Statement (Notification Only), Fraud Alert	<input type="radio"/> Business Services	Business Lending, Business Services	<input type="radio"/> Cards	Credit Card, Debit Card	<input type="radio"/> Communication	Newsletter, Message from CEO/President, Financial Education	<input type="radio"/> eServices	E-Statement, Mobile Banking, Skip-A-Pay, On-Line Banking, On-Line Bill Pay	<input type="radio"/> Events/Community	Community Project, Event/Seminar, Grand Openings, Public Relations	<input type="radio"/> Insurance/Investment Services		<input type="radio"/> Loans	Auto Loan, Consumer Loan, Equity Loan, Mortgage, Personal Loan, Student Loan, Refinance	<input type="radio"/> Refer-A-Friend		<input type="radio"/> Savings	Certificates, Checking, Savings
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Step 9	A popup will appear, confirming that the launch has been scheduled. The email is automatically moved from the Drafts tab to the Scheduled tab.																								
9.1	Click Create Scheduled Report if desired.																								
	 <p>Schedule Launch</p> <p>Your Email was successfully launched.</p> <p>Create Scheduled Report Close</p>																								