MARQUIS

DOCUMATIX

GETTING STARTED WITH EMAIL EDITOR

Marquis

5208 Tennyson Pkwy, Suite 120

Plano, Texas 75024

Technical Support: Call 877-362-8628 or email dsupport@gomarquis.com

www.gomarquis.com

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USING THIS GUIDE

Welcome to DocuMatix! This guide serves as your end-to-end resource for creating a new email within DocuMatix. Specifically, this guide includes:

- The primary steps needed when creating an email within the new email editor
- How to add cell types and configure cells within your email
- A walk-through of how to finish the email process; including how to set up the inbox appearance, add email recipients, and schedule the launch

Let's get started!

MARQUIS

Walkthrough

Upon logging in to DocuMatix, you'll first arrive on the Dashboard, which displays multiple items, such as recent work or options to build new projects. After your initial log in, DocuMatix will default to the last view.

1. In the upper left-hand corner you can toggle between the available dashboards from the list: Product Suite, On Demand, & Text Messaging.
2. To the right of the dashboard selection are additional modules such as At a Glance, as well as a management section for each type of project that can be created in DocuMatix.

3. Below the Dashboard options is the Add New section, which provides shortcuts to create new projects. Within the Add New section are cards for each type of project that is available within the selected Dashboard. Depending on the type of project, you'll see options for New and/or Template. If the New option is chosen, the project will be created from scratch.
4. The last section is the Recent Work area which displays a list of your most recently modified projects. Recent work is grouped into four categories, depending on the progress:
   - **Drafts**-Displays emails currently in edit mode
   - **Scheduled**-Displays emails with a scheduled launch date in the future
   - **Published**-Displays emails that are currently active and tracking results
   - **Completed**-Displays emails that are currenly not being tracked

Navigate to Email Management

To begin the email creation process, you'll navigate to Email Management, where you'll find the different types of emails available, and tools to create them.

To navigate to the Email Management area of DocuMatix:

1. Ensure that **Product Suite** is selected from the drop-down menu on the far left.

2. Click the arrow to the right of the **At a Glance** menu.

3. From the drop-down menu, select **Email Management**.

To begin the email creation process, click either the **New** (from scratch) or **Template** option from within the card for the desired email type.

Using Templates

When using a template, you'll be able to choose from:

- A previously saved template

- A pre-defined DocuMatix Layout

- A pre-built DocuMatix template

To select your desired template or layout, click the arrow in the bottom right corner of the card, as outlined below.

1. Within the Saved Templates area, click the arrow in the lower right-hand corner of the desired template card to begin the creation process.

2. If you would like to create a DocuMatix Layout or DocuMatix Template, click either tab to open the library of DocuMatix Layouts or Templates.

3. After the desired DocuMatix Layout or DocuMatix template is chosen, the creation process is the same as a saved template.

From this point forward, the email creation process is the same as a new (built from scratch) email.
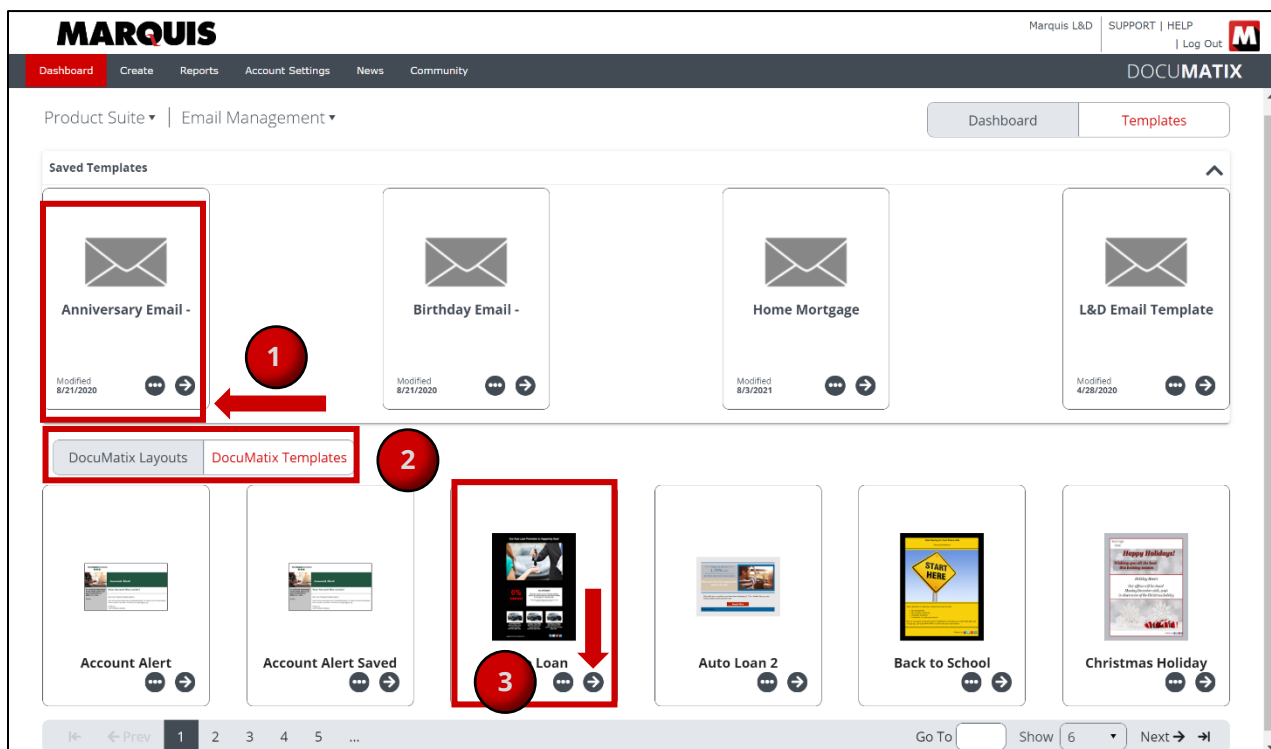
Note: If you're not sure which type of email to choose, select **Create** from the menu at the top of the screen, then select **Email**. Here, a description is listed for each campaign type.

Complete The Basics

Tab 1: The Basics. Within this page, set the stage for your new email and complete **The Basics** page:

1. Type in a **Name** of the email.

2. Optional: Add a **Description** to identify the content of the email.

3. Save the email to a **Folder** to easily locate the email in the future.

4. Click either the tab for **Yes, Use the DocuMatix Editor** or **I have HTML I would like to use**.

5. Select the desired **Layout** mode (Desktop or Mobile) to determine if the email will be single column (mobile) or multi-column (desktop).

6. Click the **Continue** button at the top or bottom of the page to proceed to the next step, Editing your Email.

Note: After clicking Continue, the selections for DocuMatix editor and Layout mode cannot be modified.

Build Your Email

**Tab 2: Editing Your Email**. This is the Email Editor where you will build your email content. Within the Email Editor, we will cover the nine cell types which are available for all email types. All emails are built by combining the desired cell types. All cells are then configured to display the desired content.

First, you'll learn how bring your email to life with three popular cell types: **Image, Text, and Text & Image**.

1. Hover over any cell type until the 4-way directional arrows appear.

2. **Click, then drag and drop** any cell type to place it within the workspace area in the center of the screen.
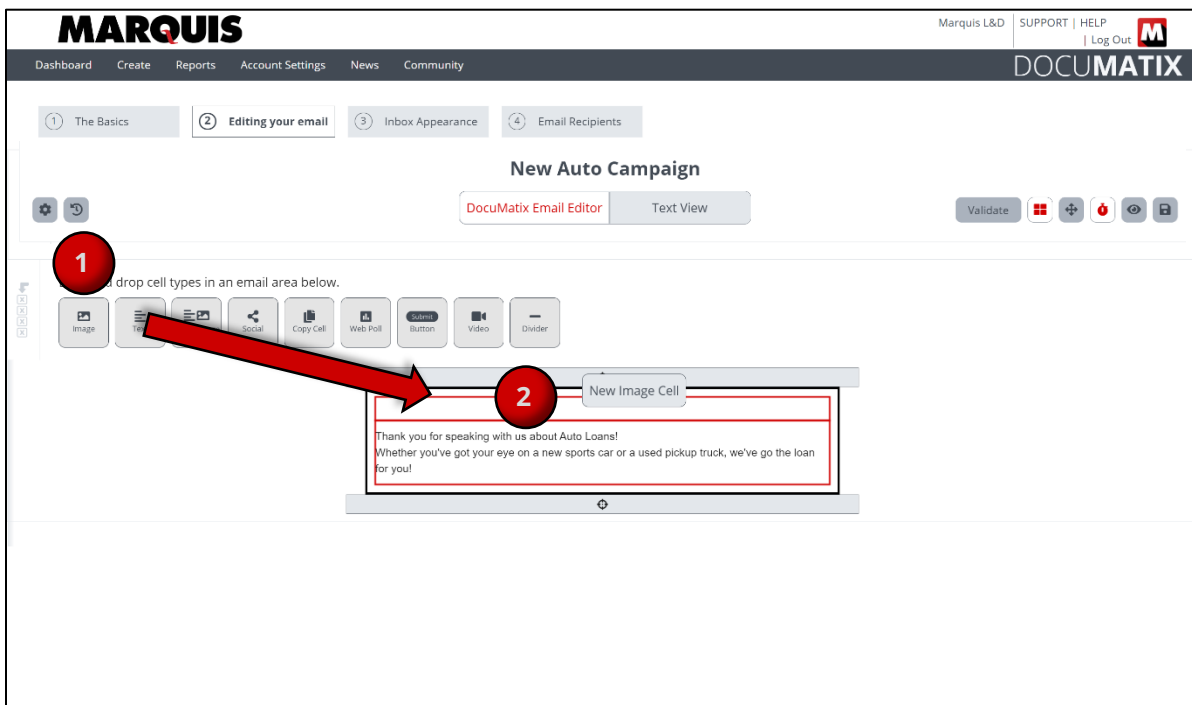
3. To edit the conten
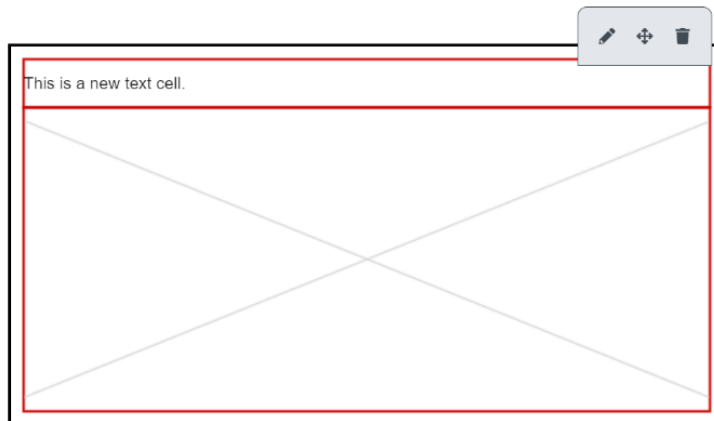
Image Cell

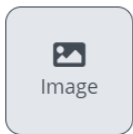Make a statement and grab your readers' attention by adding images to your email.

1. From the top menu in the email editor, click the image cell type button, then drag and drop the cell into the email.

2. Hover over the image cell, then click the pencil icon to edit.

3. Click the **Choose Image** button to add the desired image.

4. Click any of the tabs below to add an image from your local drive, from the library of DocuMatix stock images, from your saved files, or from a website.
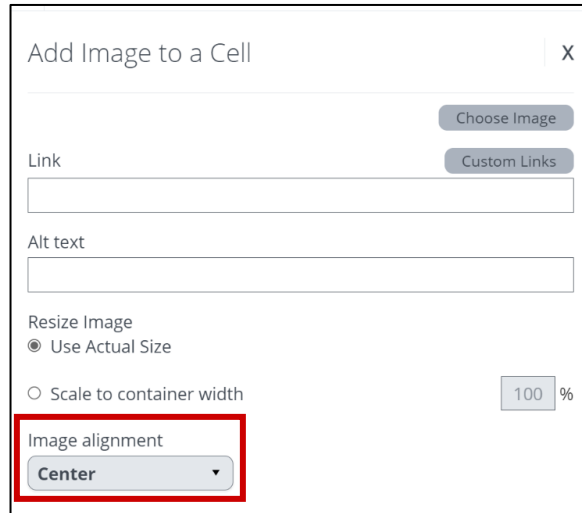

5. Select the desired image from within the selected tab and click Submit.

6. **Type in an Alt text description. This is required** and provides a written description of the images for visitors who are unable to see them.

TIP: If you'd like to direct your readers to an external **URL when clicking the image**, copy/paste or type the URL in the **Link** field.

7. Use the drop-down menu to determine the **image alignment** within the cell.

8. Click the X in the upper right-hand corner to close out of the image cell editor.

9. Save your progress by clicking the [save icon] icon in the upper right-hand corner of the screen.

To add an animated image:

1. Click the Choose Image button within the image cell (shown above).
2. Select the DocuMatix tab.
3. Choose the radio option for Animations.
4. Select the desired animated image from the library of options.
5. Select the corresponding checkbox to loop the animation continuously and/or save to your images.
6. Scroll to the bottom of the window, and click Submit to add the selected image to the cell.
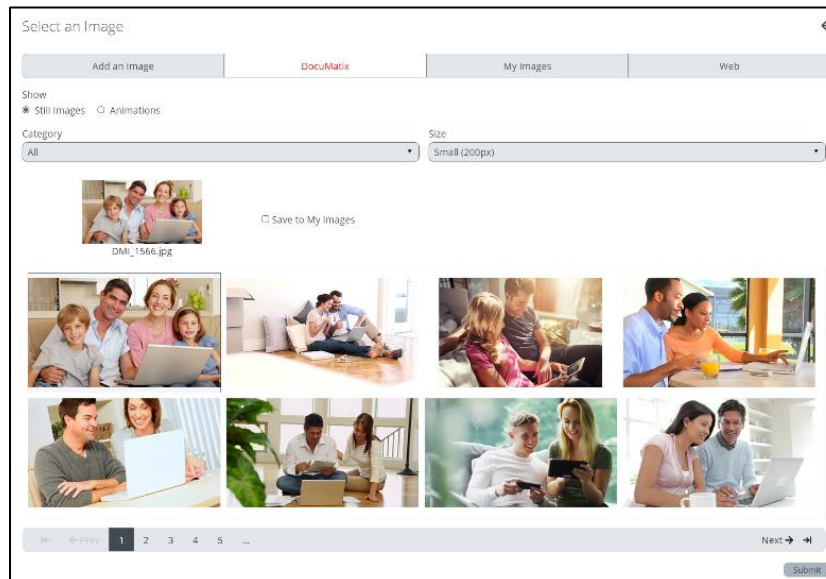
Text Cell

Text cells may be used for titles, short statements, disclaimers, and/or may contain the body of your email communications. The text cell functions as a word processor, where all formatting tools are available.

To add a text cell:

1. Click, then drag, and drop the text cell to place it within the workspace area in the center of the screen.

2. Hover over the cell until and click the Pencil icon to edit.
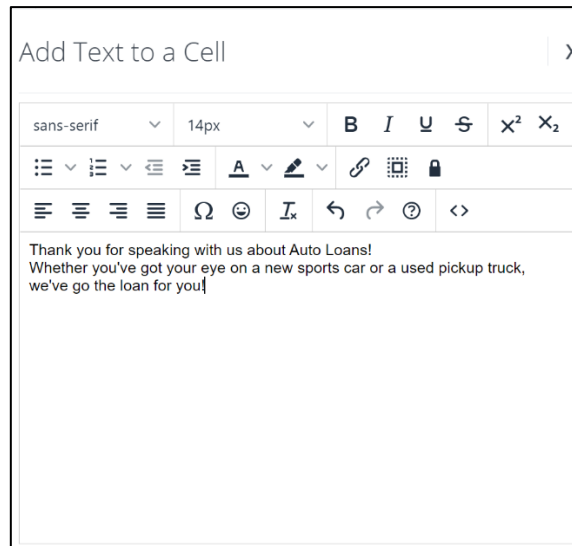
3. Type the desired text into the text cell.

Merge Fields

Merge fields are fields which allow information to flow from the CSV (data) file into the of the email. DocuMatix provides the option to add two types of merge fields:

- **User Defined-**define and select the fields that will be available in the data file.

- **DocuMatix Merge Fields** are common DocuMatix fields that provide key information.

Merge fields may be used to contain important information such as current date or security keys. For example, Merge fields can be used to pull in an individual's name to set the email address as the recipient, or reference important information such as the recipient's birthday.

1. To add merge field(s) to the body of an email: click the Merge Field Icon.
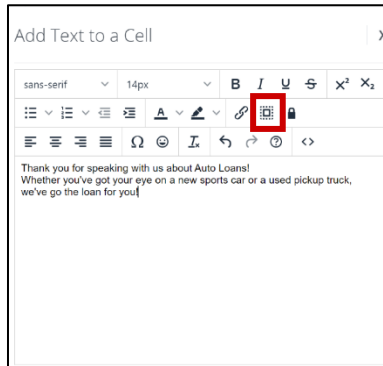
2. This will bring up an Add/Update Merge Field window, where you will click the desired tab for **User Defined** or **DocuMatix**.

3. Click the radio button next to the merge field that will be inserted into the email subject, preview text, or body of the email.

4. For a **User-Defined** merge field, enter the name of the merge field, such as First Name.

   a. For either type of Merge Field, click the **Insert Merge Field into email** button.
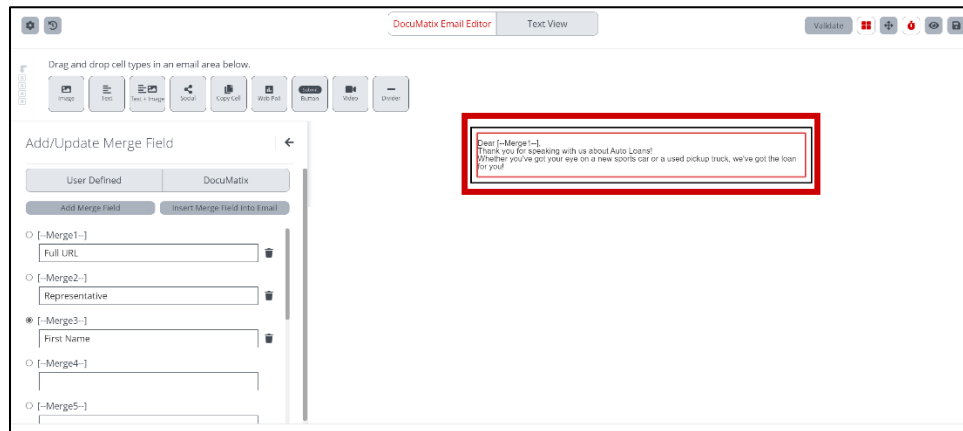
User Defined

DocuMatix

Note: Ten User-Defined merge fields are listed by default. If you want to define more merge fields, click the Add Merge Field button.

Example: User Defined Merge Field Added

Text and Image Cell

A combined text and image cell allows you to include text and images within one cell.

Configure the Image tab:

1. Click, drag, and drop the text cell to place it within the workspace area in the center of the screen.

2. Hover over the cell and click the Pencil icon to edit.

3. Click the **Choose Image** button to enable access to the library of DocuMatix images, stored images, or insert an image from the web.

4. Click any tab to add an image from your local drive, from the library of DocuMatix stock images, from your saved files, or from a website.

5. Select the desired image from within the selected tab and click Submit.

6. **Type in an Alt text description. This is required** and provides a written description of the images for visitors who are unable to see them.

TIP: If you'd like to direct your recipients to an external **URL when clicking the image**, copy/paste or type the URL in the **Link** field.

7. Use the drop-down menus to determine the **Horizontal space**, **Vertical space**, and **Image alignment** within the cell.

Configure the Text tab:

1. Click the Text tab.

2. Type in any text that will be used for used for titles, short statements, disclaimers, and/or may contain the body of your email communications.

3. Add merge fields if desired.

4. Add links if desired.

Cell Properties

All cells have the same options for customization. Within the Cell Properties configuration area, you can:

- **Give your content room to avoid overcrowding**: Adjust the pixel values for the top, bottom, left and right of the cell
- Select the desired **Vertical Alignment**
- **Align your institution's color palette and brand standards** via the drop-down menus for Border Thickness and Background color
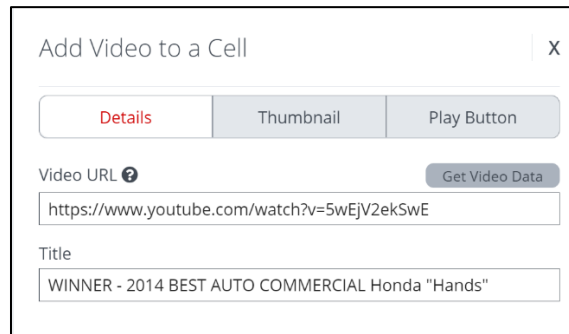
Additional Cell Types & Extras

Now that you have learned how to add our three basic cell types, you'll learn how to add two more cells: a Video Cell and a Divider Cell.

Video Cell

Video cells grab your readers' attention by directing them to a webpage to play the video.

After clicking, dragging and dropping the video cell into your email, you will copy and paste the video URL from YouTube or Vimeo. The title and default thumbnail will populate after clicking the **Get Video Data** button. From here, additional customization for the Video cell is available within the **Thumbnail and Play Button tabs.** If desired, you can select a different image for the video thumbnail and customize how the play button appears.

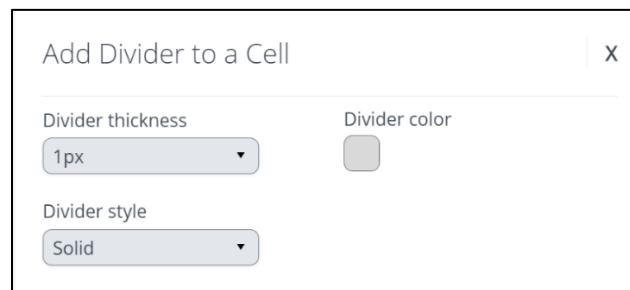**Note:** Some email clients will open a webpage to play the video instead of playing it within the email.

Divider Cell

Divider cells are used break up your content in your email. Remember, all cells are edited by hovering over the cell, and clicking the pencil icon.

The cell may be configured by using any combination of these options:

- Use the drop-down arrows to set the desired **thickness** and **style**

- Use the **Divider color** selector to select the desired divider color to coordinate with your Institution's brand and color scheme

Set up the Email Settings/Header and Footer

In the process of building an email, you may also wish to customize the Email Settings or the appearance of your header/footer.

Within the Email Editor, click the Settings button at the top of the screen.

Clicking the Settings button will display four tabs: Email, Header, Footer, and Mobile. Click any of the four tabs to access various settings which may be customized.

Use the Email tab within settings to configure the look of your email, including background color, link color, and font.
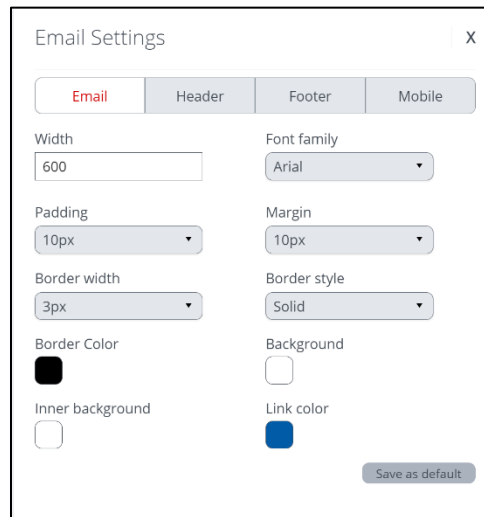
Headers and Footers

The Header controls the placement and look of the Preview Text (also known as Snippet) and View as Web Page links.

By default, your Headers and Footers are already established for your DocuMatix account and your institution's address and logo are added to the email footer.

 Here you'll be able to make changes to your Header/Footer setup, if desired.

Click the Header or Footer tab to customize the font family, size, color and border thickness to align with your institution's color palette and branding.

Add a Call to Action

Next you'll learn how to add Social Media, Web Polls, and Buttons to provide your readers with additional content or request them to take action. Buttons can be added to your email to link the reader to an external URL, Event, Survey, Web Form or Document.
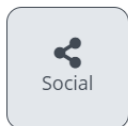
Social Cell

Add a Social cell to connect with your readers via Social media and encourage further interaction.

Within the General Tab:

- Choose **Share** to determine if the recipient will be able to share using the preferred social media

- Choose **Follow** to follow the institution on social media

- Add follow text **follow text** to supply the text that will appear next to the button

Within the Social Media Accounts tab:

- Select the desired checkbox(es) to connect via Facebook and/or Twitter.

- Add the appropriate title/message/description for the type of social that is being added.

Web Poll

Add an interactive element to your emails and encourage your readers to take action through the use of Web Polls.
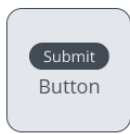
Note: The web poll must first be created and Published within the Web Polls management section, accessible from the Product Suite dashboard. Web polls are added to your email by choosing the desired web poll from the list of available web polls within the folder where the web poll is saved.

Buttons

Use buttons within your email to easily link readers to an external URL, Event/Web Form link, or a document from the Document Rack.

Buttons are configured by entering in the desired text, then formatting the Border and Style as desired.
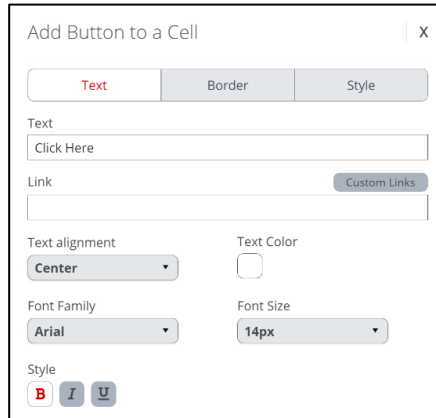
What are Custom Links?

Custom links are links to either an external URL or a link to a resource which has already been created, such as a Survey, Web Form, or Document. Remember that an Event, Survey or Web Form must first be published in order to be linked.

Where can you add Custom Links?

Examples of where you may see Custom Links:
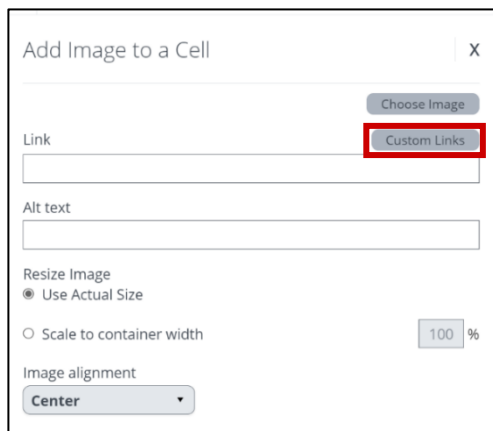
Image cell   **Text Cell**   **Button Cell**

After clicking the Custom Links button from within any of the cells above, you'll see a popup box similar to the images below.

To link to a URL, copy and paste an external URL into the URL field. To link to another resource, click the tab that corresponds to the type of link you'd like to include (such as an Event, Survey, Web Form, or Document).

Add a URL   **Add another Resource**

Use the Resize, Auto Save, Preview, and Save Buttons

Use the buttons at the top of the Editing Your Email screen to perform these functions:
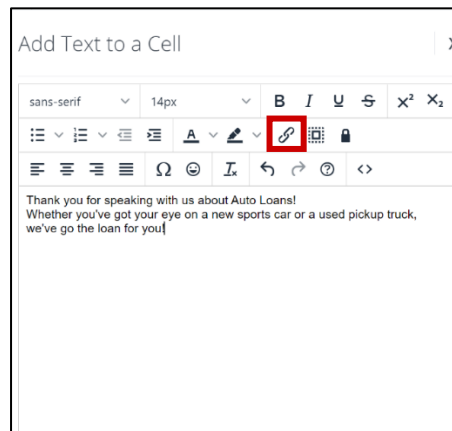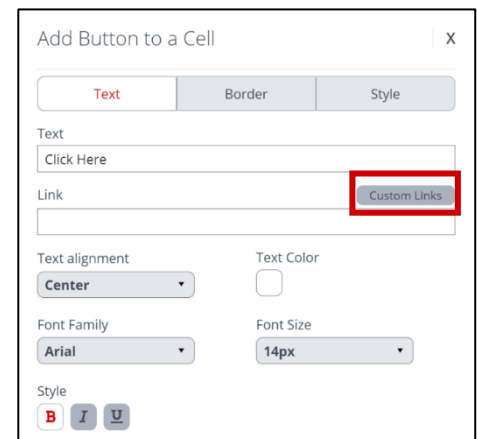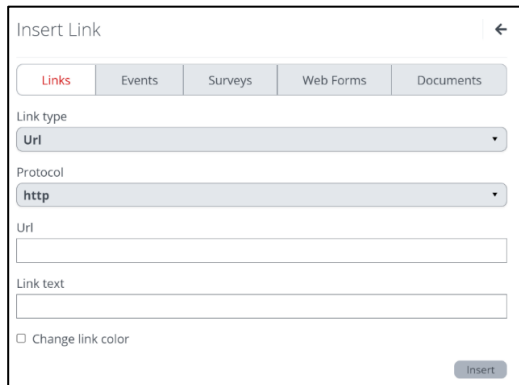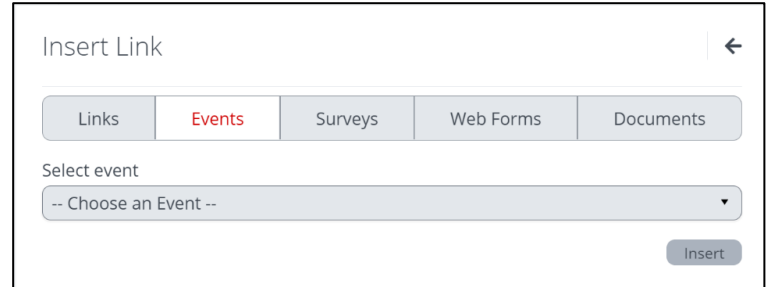
Cell Resize - Click and drag the up/down arrows to adjust the height and width of the desired cell.

Auto Save - Click the button to toggle on or off and save your progress every minute, automatically.

Preview - Several preview options are available to display what the recipients will see, including view on desktop, mobile, send a sample, etc.

Save - Click to retain a history of your changes.
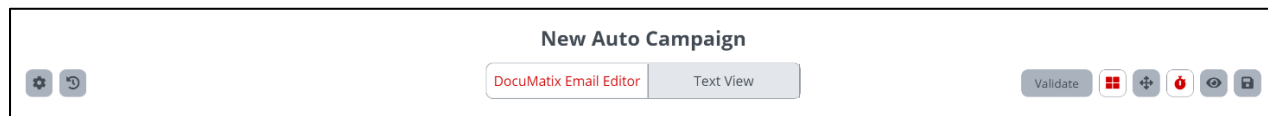
Set up the Inbox Appearance

Tab 3: Inbox Appearance

Once the email build is complete, click the tab at the top of the screen titled Inbox Appearance.

A/B Split Testing is the default Inbox selection. Alternatively, you may click the tab for Single Subject Line.

A/B Split Testing is used to test two different subject lines to see which one performs better. The system then sends out the remainder of your email list using the subject that had the most success.

A/B Split Testing

Single Subject Line

Enter in the following information:

- The Email Subject

- The Preview Text

- The From Email address

- Reply To email address

Note: Merge fields are also available for use here, to allow content to flow from your CSV data file into the Email Subject and/or Preview text.

Add Recipients to the Email

Tab 4: Email Recipients

Note 1: This process explains how to add recipients to a Standard or Newsletter email. Other email types follow different processes to add recipients, depending on the type of email.

Note 2: A data file is needed for DocuMatix to determine the recipients of your email. The data file will need to have already been created and saved to your computer in CSV format, since this step simply allows for the upload, and not the creation, of the data file.

1. To upload the data (csv) file, drag and drop the selected file or click the **Select Files** button.

    1a. By default, DocuMatix removes all duplicate email addresses. To include duplicates, select the check box.
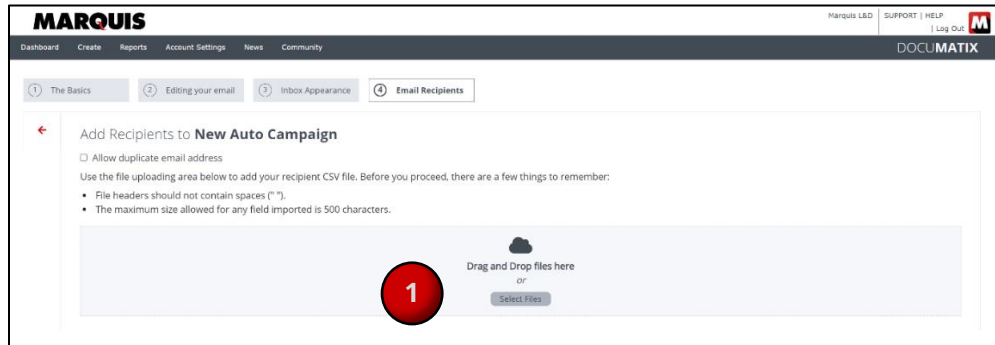
Note: Alternatively, the data file can be uploaded from the Email management page, when the email is in **Defining status**.
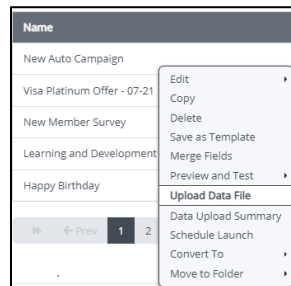
2. Map the fields from the data file to the corresponding merge field(s).

Note: Mapping is the process of aligning the merge fields created within DocuMatix to the header fields contained in the CSV file. For example, the Email Address merge field (a required field) could align with the CSV header called Recipient Email.
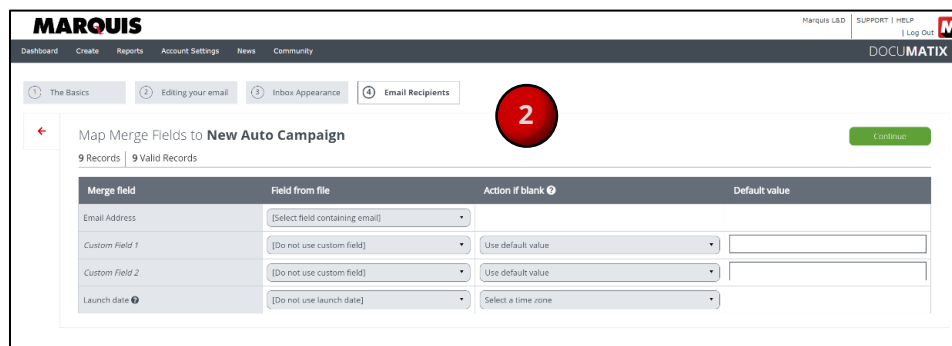
   a. In the **Field From File** column, use the drop-down options to map the fields to use from the data file to their corresponding merge field(s).

b. In the **Action if Blank** column, you will tell DocuMatix what action to take if the selected field from the file is blank. Select the desired Action if the selected field from the file is blank (the CSV file provides no merge field value) from the drop-down menu. DocuMatix will determine which action to take:

- o **Reject record**: the email will not be sent
- o **Remove merge field**: the merge field will be removed from the email
- o **Use default value**: the merge field will be replaced with the Default value text

c. **The Default value column** Corresponds to the Action if Blank column to supply a default value that will be used when that field for a record is blank.

d. Click Continue.

3. Verify the file and number of records is correct.

a. Here you may also add additional files. If you wish to add more files, repeat steps 1 & 2 above.

b. Click Next.

Add Recipients to **New Auto Campaign**   Next

☐ Allow duplicate email address

Use the file uploading area below to add your recipient CSV file. Before you proceed, there are a few things to remember:

- File headers should not contain spaces (" ").
- The maximum size allowed for any field imported is 500 characters.

☁

Drag and Drop files here
or
Select Files

Validating File

We are validating the records in your file. For large files, this may take some time. You will be notified when it is complete and if there are any corrupt records.

Records to be Imported	③	
From CSV Files		9
Total		9

Note: Once the Email Recipients step has been completed, you cannot add more files without removing and adding all files you wish to use.

4. Once the file name populates, click the **Schedule Launch** button.

To modify data you must first remove all previously uploaded records by clicking the Remove Data button. To launch the email campaign, using the currently uploaded data, click the Schedule Launch button.
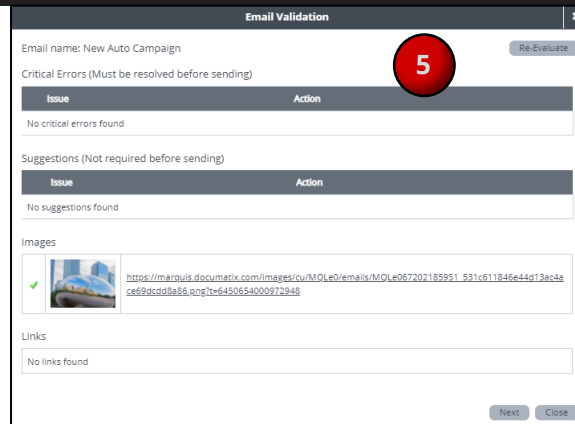
Filename	Number of Records	④
DMX mock source file.csv		1

Remove Data   Preview with Data   Schedule Launch

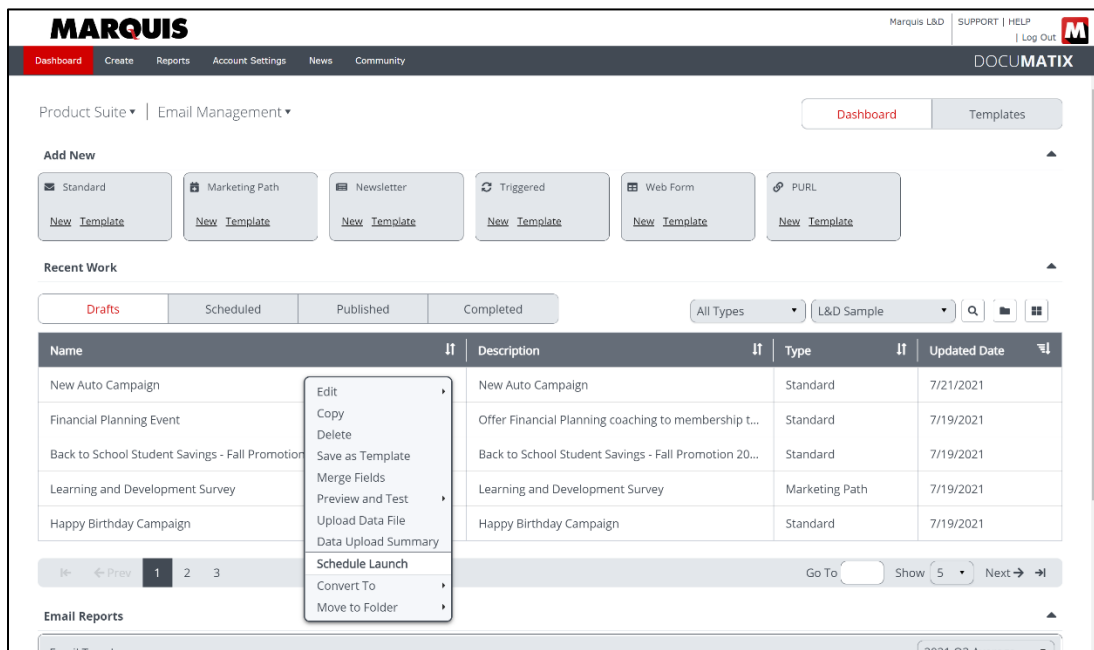5. Validate any critical errors and resolve any issues with the images or links.

a. Click Next.

Schedule the Email Launch

Once the email build is complete and the data file has been added, you will schedule the email launch from the recent work area of the Product Suite Email Management Dashboard.
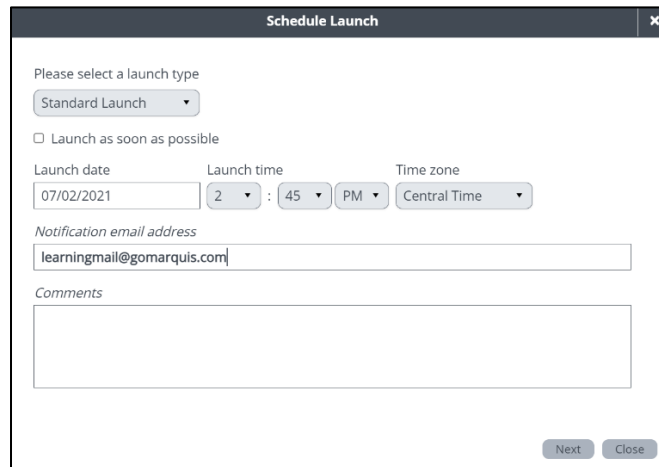

Choose from one of three launch types available:

- **Standard Launch**- The email will be sent one time to each email address that is upload on the data list. Sender chooses one date and time of delivery.
- **Staggered Launch**- The 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.
- **A/B Split Launch**- Allows the sender to test two different subject lines to see which one performs better. Also includes additional options such as how many to include in the test, what metric to use when determining success, how long to wait before sending the later launch.

1. From the Launch Type drop-down menu, select the desired launch type (Standard Launch or Staggered). This example is a standard launch, meaning that the email will be sent one time to each email address that is upload on the data list. The sender chooses the date and time of delivery.

2. Select the checkbox for Launch as Soon as possible if the email does not need to be launched at a specific date or time. Or, use the calendar to select the launch date and time.

3. Enter in the notification email address (this indicates who will receive the notification that the email has been launched).

4. Add additional comments if necessary. Additional comments may be used to include internal comments on emails to keep other members of your marketing team in the know, regarding this email.

5. Click Next to finish scheduling the launch.

After the launch is scheduled, you'll have the option to schedule a report to be delivered to you, as well as Click-Through rates and Click-Through Open rates. Scheduled reports can also be created for the campaign, when accessing the campaign via Recent Work.

Training & Additional Resources

Processes, Procedures, FAQs and Help Videos:

To access help videos, step by step procedures and FAQs click the HELP link in the upper right corner of the DocuMatix platform and navigate to the desired resource.