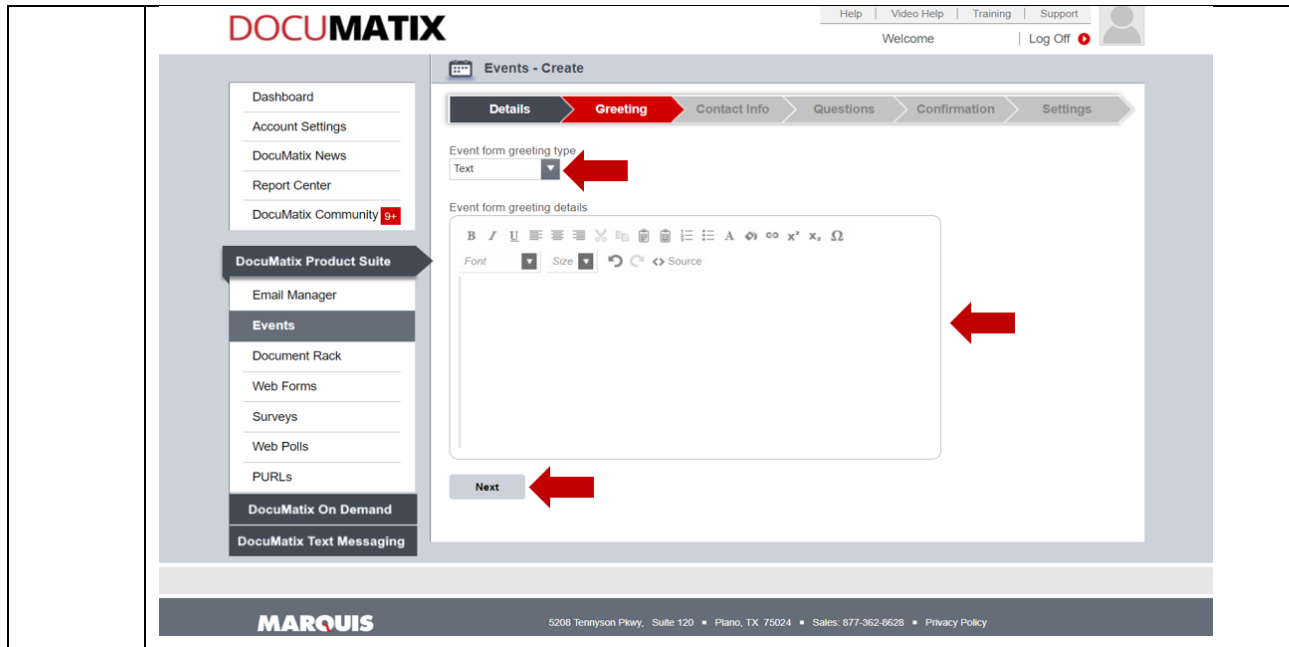


MARQUIS

DMX332	Creating an Event
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Click on "Events" located in the menu on the hand left side of the page
Step 3	Click on the green "Add New" button in the top right of the page
Note: Anything in italics within the design process is an optional field as noted below. Some fields may auto populate from Account Settings.	
Step 4	Complete the "Detail" page
	<ul style="list-style-type: none"> • Event Name • Description (optional) • Require Registration (optional) • Place in Folder • Calendar • No sessions available message (optional) • On-screen confirmation message (optional)
Step 5	Click on "Next"
Step 6	Complete the "Greeting" page
	<ul style="list-style-type: none"> • Event form greeting type • Event form greeting details – This form and selections will change based on the greeting type selected

MARQUIS



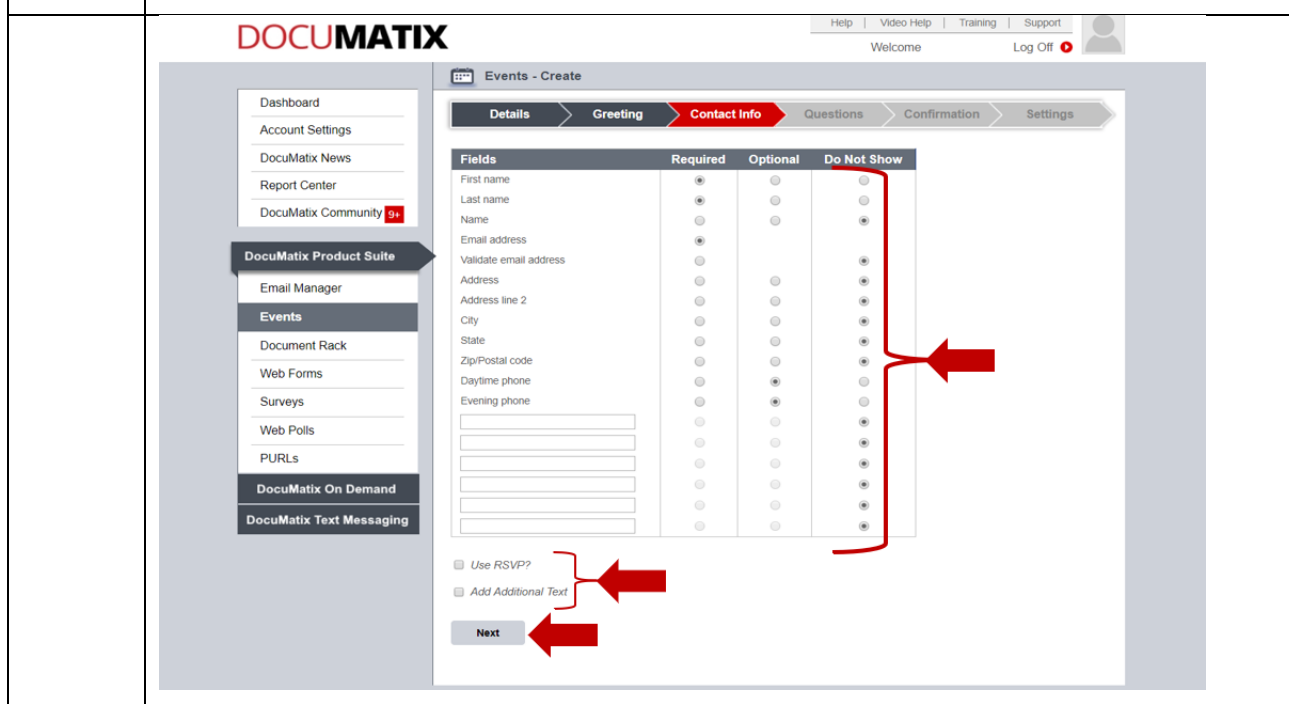
Step 7 Click on "Next"

Step 8 Complete the "Contact Info" page

- Fields – Select if they are Required, Optional, or Do Not Show

Note: The blank field boxes at the bottom of the list are for custom fields. Simply type in the desired field names and select Required, Optional or Do Not Show.

- Use RSVP? (optional)
- Add additional text (optional)



Step 9 Click on "Next"

Step 10 Complete "Questions" page

MARQUIS

	<ul style="list-style-type: none"> Place check marks next to questions to be included
Step 11	Click on “Next”
Step 12	Complete the “Confirmation” page
	<ul style="list-style-type: none"> Subject
	<ul style="list-style-type: none"> Email confirmation from name
	<ul style="list-style-type: none"> Reply email address
	<ul style="list-style-type: none"> HTML body (optional)
	<ul style="list-style-type: none"> Text body (optional)
<p>Note: If there are any merge fields within the HTML Body or Text body that are not desired, please delete them out of the text box.</p>	
	<ul style="list-style-type: none"> Include confirmation link
	<ul style="list-style-type: none"> Include a cancellation link

MARQUIS

Step 13	Click on “Next”
Step 14	Complete the “Settings” page
	<ul style="list-style-type: none"> • Choose Logo
	<ul style="list-style-type: none"> • Show logo
	<ul style="list-style-type: none"> • Logo alignment
	<ul style="list-style-type: none"> • Submit button alignment
	<ul style="list-style-type: none"> • Event form details header (optional)
	<ul style="list-style-type: none"> • Registration information header (optional)
	<ul style="list-style-type: none"> • Sessions to attend header (optional)
	<ul style="list-style-type: none"> • Additional questions header (optional)
	<ul style="list-style-type: none"> • Session name (optional)
	<ul style="list-style-type: none"> • Hide session name
	<ul style="list-style-type: none"> • Hide session numbering
	<ul style="list-style-type: none"> • Save my current settings as default values
	<ul style="list-style-type: none"> • Form width
	<ul style="list-style-type: none"> • Color selections
Step 15	Click “Finish”

MARQUIS

The screenshot shows the DocuMatix interface for editing an event. The top navigation bar includes 'Details', 'Greeting', 'Contact Info', 'Questions', 'Confirmation', and 'Settings'. The left sidebar lists various product suite options, with 'Events' currently selected. The main content area is titled 'Events - Edit - Learning and Development' and contains several settings sections. The 'Event form details header' section includes a 'Show logo' dropdown set to 'No', 'Logo alignment' set to 'Left', and 'Submit button alignment' set to 'Left'. Below this is a rich text editor for the header content. The 'Registration information header' section also includes a rich text editor. Red arrows highlight the 'Use Company Logo' button, the 'Show logo' dropdown, the 'Logo alignment' dropdown, the 'Event form details header' text area, and the 'Registration information header' text area.

Step 16 A message will appear asking for confirmation to create a session for the event. Click **“Yes”** if you wish to schedule the event.

Note: An event cannot be published until a session is added