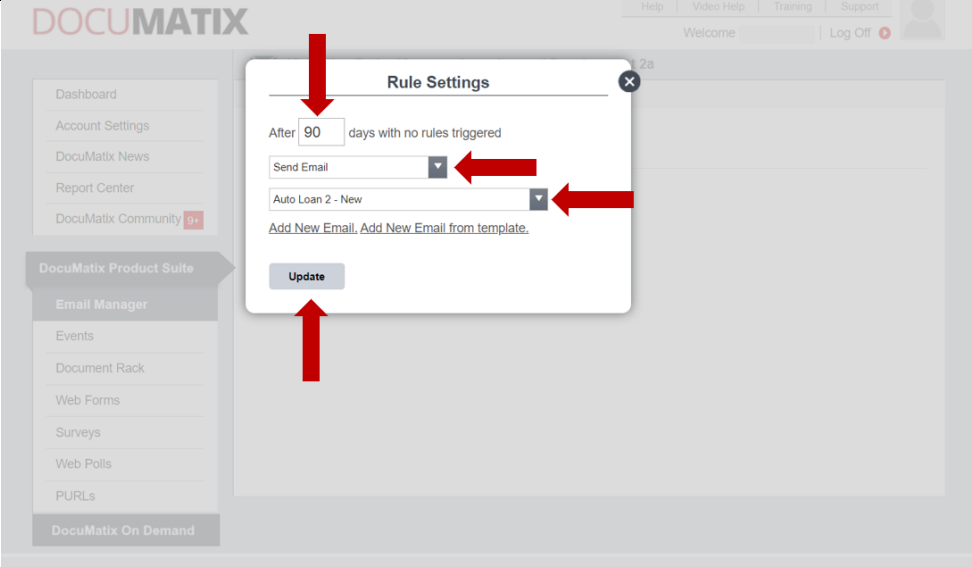


MARQUIS

DMX324	Build a Marketing Paths
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Click on " Email Manager " located in the menu on the hand left side of the page
Step 3	Click " Marketing Paths " located near the top of the screen
Step 4	Click the green " Add New " button
Step 5	Define the following items under " Details " for the specific marketing path
Note: 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"> Marketing Path Name
	<ul style="list-style-type: none"> Description (optional)
	<ul style="list-style-type: none"> Merge Fields – There are 10 available merge fields available to be defined. These will be all merge fields applied to all emails in the path
Step 6	Click " Next " to complete the details section
6.1	If the email for the Marketing Path has been created, move to Step 7 .
6.2	If you have NOT created the email, click on " Email Manager " located in the menu on the left hand side of the page and refer to the Creating an email for Marketing Path document for step by step procedures.
Step 7	Click " Send Email "
Step 8	Click the drop-down arrow to select the Email to be sent
Step 9	Click Update to complete the selection
Step 10	Click " After 90 days " to get to the Rule settings
Step 11	Type in number of days
Step 12	Choose the Action: End Marketing Path, Send Email, Trigger New Marketing Path
12.1	If End Marketing Path is chosen, the path will end after that time frame

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12.2	If Send Email is selected, a drop-down arrow will appear for the selection of another email. Please refer to the Creating an email for Marketing Path procedure document for step by step procedures on setting up an email.
12.3	If another email is not present, click on the Add New Email or Add New Email from Template buttons to create one to apply.
12.4	If Trigger New Marketing Path is selected, another drop-down arrow will appear for the selection of another Marketing Path
Step 13	Click Update once all selections are made
	Repeat steps 7-13 until the path is complete. The last email campaign should have an action of End Marketing Path
	
Step 14	Click “Marketing Paths” to refresh the list so the new path is visible
Step 15	Click it once and select “Publish” from the menu selections
	If any errors are found in the emails, a message will pop up alerting to what needs to be updated or corrected before the Marketing Path can be published. Navigate to Email Manager to edit the email and make the necessary changes. Please refer to the Creating an email for Marketing Path document for step by step procedures.
Step 16	If no errors are found, click Next
Step 17	Type in an email address for notifications to be sent to
Step 18	Click “Publish”
	The Marketing Path will now be visible under “Published”