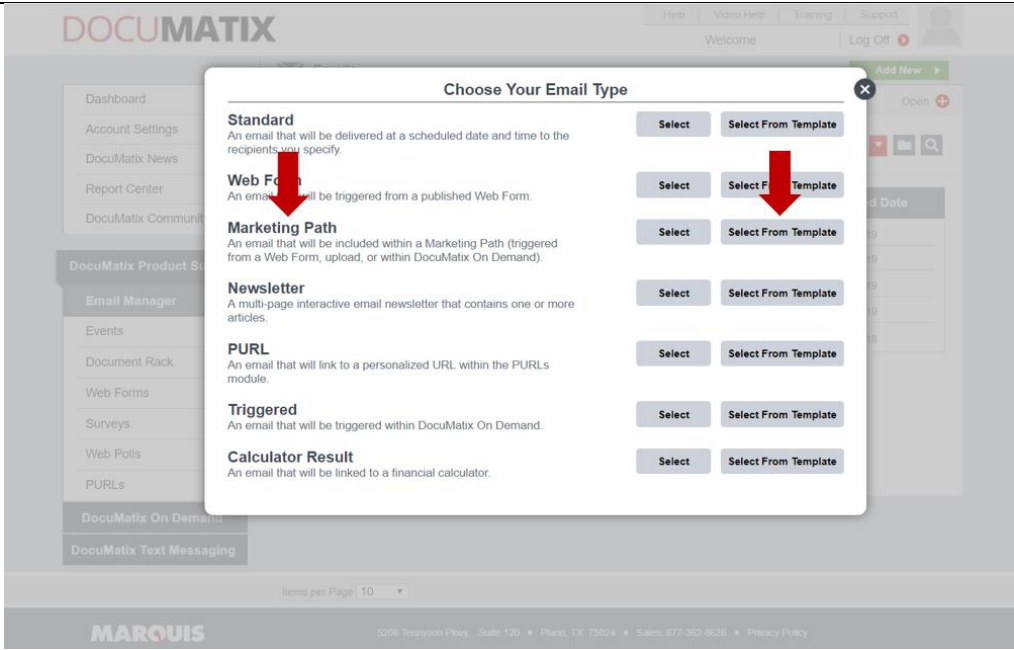
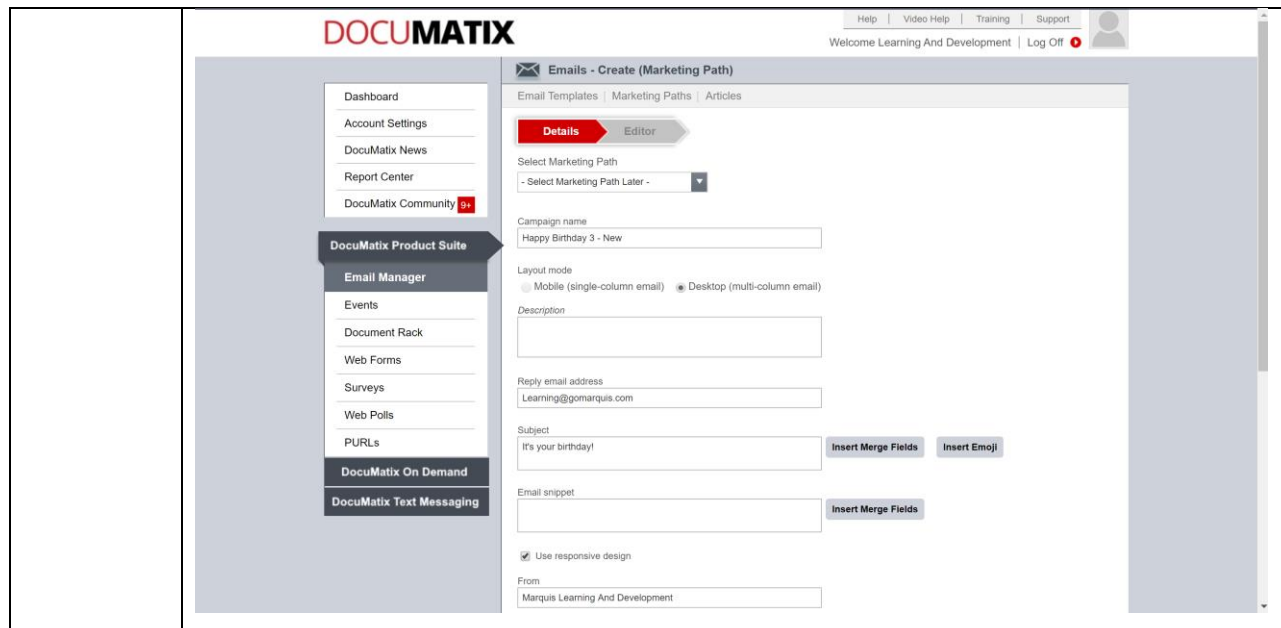

















MARQUIS


DMX323	Creating an Email for Marketing Paths from a Template
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 on the green "Add New" button in the top right of the page
Step 4	Under Marketing Path click on "Select From Template"
	
Step 5	Choose a Template box will pop up, click on "DocuMatix Templates"
Step 6	Choose a template, by hovering over the selection and clicking on "Select"
Step 7	Complete or make modifications to the "Detail" page
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"> Select Marketing Path
	<ul style="list-style-type: none"> Campaign name
	<ul style="list-style-type: none"> Layout Mode
Note: Mobile Layout Mode is for a single column email making it easier to view on a mobile device and Desktop Layout Mode allows for multi-column emails for viewing on a computer.	
	<ul style="list-style-type: none"> Description (optional)
	<ul style="list-style-type: none"> Reply email address
	<ul style="list-style-type: none"> Subject, if needed "Insert Merge Fields" and "Insert Emoji"
	<ul style="list-style-type: none"> Email snippet (optional), if desired "Insert Merge Fields"
	<ul style="list-style-type: none"> Use responsive design
	<ul style="list-style-type: none"> From
	<ul style="list-style-type: none"> Place in folder
Step 8	Click on "Next"

MARQUIS



Step 9	Make any changes to the existing items in the template.
Step 10	Select an icon that corresponds to the function desired by “Click, Drag, and Drop” the icon into the body of the email being created. Existing cells can be rearranged using the “Click, Drag, and Drop” method.
	<ul style="list-style-type: none"> •  Text
	<ul style="list-style-type: none"> •  Image
	<ul style="list-style-type: none"> •  Text and Image
Note: When utilizing an IMAGE within the email, the Alt Text will need to contain text that describes what the image represents as it is used when emails are viewed through a viewing impaired app.	
	<ul style="list-style-type: none"> •  Divider
	<ul style="list-style-type: none"> •  Social
	<ul style="list-style-type: none"> •  Copy Cell From Other Email
	<ul style="list-style-type: none"> •  Web Polling
	<ul style="list-style-type: none"> •  Video
	<ul style="list-style-type: none"> •  Button
Step 11	Click and adjust email parameters as needed
	<ul style="list-style-type: none"> •  Grid Lines
	<ul style="list-style-type: none"> •  Resized
	<ul style="list-style-type: none"> •  Settings
Step 12	Hover over each cell to Edit , change Settings , and Delete
	<ul style="list-style-type: none"> •  Edit
	<ul style="list-style-type: none"> •  Settings
	<ul style="list-style-type: none"> •  Delete
Step 13	To select the preferred Preview and Test method, click the drop-down arrow for Preview and Test
Step 14	Click on the preferred testing Method

MARQUIS

Step 15	If a misstep was made and the changes need to be reset, click on the History button
Step 16	Click the drop-down arrow for Select a Version
Step 17	Click on a version to verify the settings
Step 18	Once the desired version is found, click Revert To This Version
Step 19	The system autosaves every minute but we recommend clicking on “Save” on the right side of the menu bar
	 A screenshot of the Documatix web editor interface. The browser title bar shows 'Editor - Happy Birthday 3 - Learning'. The interface includes a top navigation bar with 'Support' and 'Log Off' links. Below this is a toolbar with various editing icons. On the right side of the toolbar, there are buttons for 'History', 'Validate', and 'Save', along with a dropdown menu labeled '--Preview and Test--'. A green button labeled 'Return to Emails' is located in the top right corner of the editor area. The main content area displays a birthday card template with the text 'HAPPY BIRTHDAY' and a background of red and white striped flags. Red arrows point to the 'Return to Emails' button, the 'History' button, the 'Validate' button, the 'Save' button, and the 'Preview and Test' dropdown menu.
Step 20	Click the green button “Return to Emails” to right corner of the page
	Repeat steps 4-19 for as many emails as necessary.