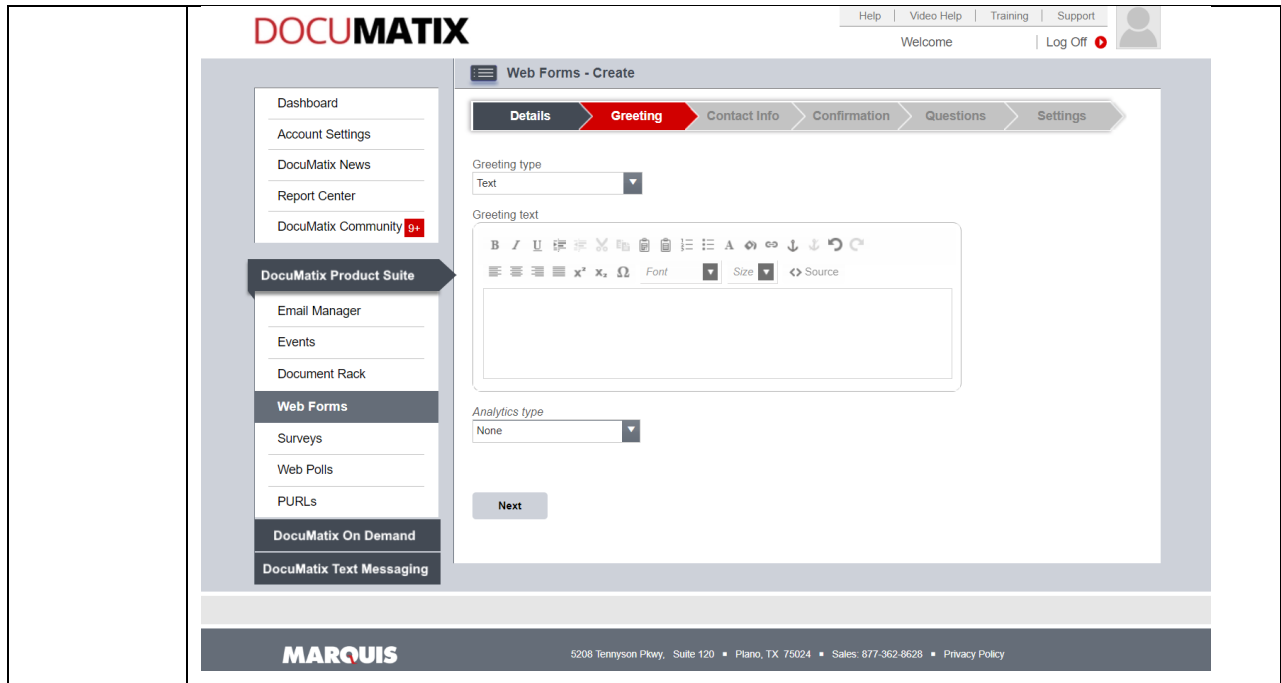


MARQUIS

DMX336	Add a Web Form
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Click on " Web Forms " located in the menu on the hand left side of the page
Step 3	Click the green " Add New " button
Step 4	Complete the " Details " 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"> • Web Form name
	<ul style="list-style-type: none"> • Description (optional)
	<ul style="list-style-type: none"> • Response notification email address (optional)
	<ul style="list-style-type: none"> • Folder
	<ul style="list-style-type: none"> • Link web form to a Marketing Path OR Link web form to an email campaign
Note: To setup an email, refer to the "Creating an Email from a Template" procedural document	
	<ul style="list-style-type: none"> • Never expire web form
4.1	If the " Never expire survey " option is not enabled, the following options will display:
	<ul style="list-style-type: none"> • Expire notification email address
	<ul style="list-style-type: none"> • Expire on date
	<ul style="list-style-type: none"> • Expire by response
	<ul style="list-style-type: none"> • Expire type <ul style="list-style-type: none"> ○ Expire message ○ Expire redirected URL
	<ul style="list-style-type: none"> • Expire message

Step 5	Click "Next"
Step 6	Complete the "Greeting" page
	<ul style="list-style-type: none"> • Greeting Type <ul style="list-style-type: none"> ○ None ○ Text ○ Graphic ○ Combination (text/graphic) ○ Combination (graphic/text) • Greeting Text • Analytics type (optional) <ul style="list-style-type: none"> ○ None ○ Google Analytics ○ Custom Java script ○ Custom HTML

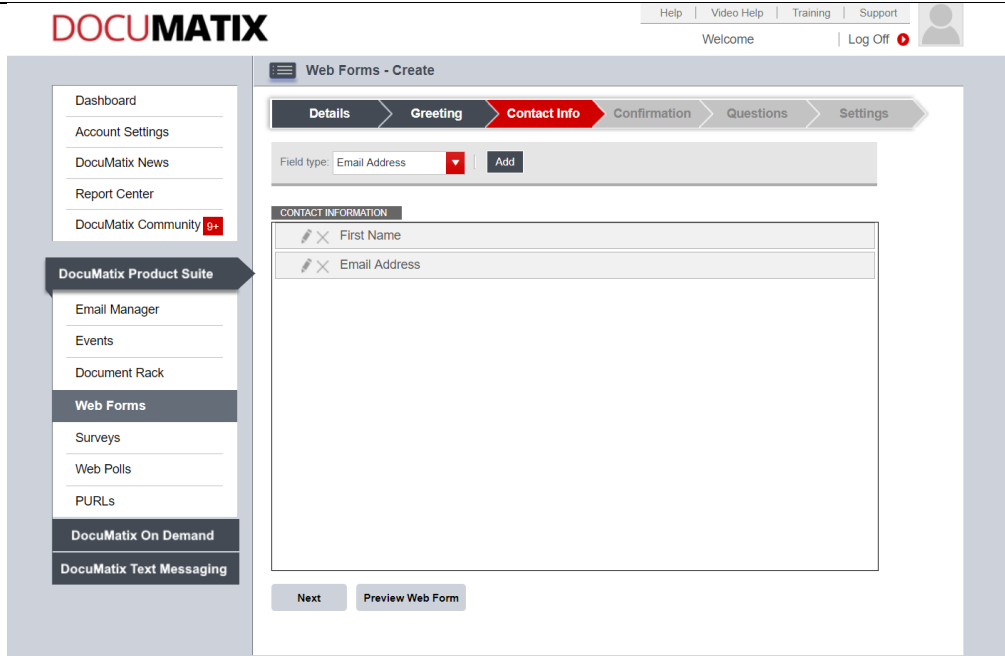
MARQUIS



Step 7	Click "Next"
Step 8	Complete the "Contact Info" page
Step 9	Click the drop-down arrow and click on a field.
Step 10	Click "Add" to select the field
Step 11	Click the pencil icon next to each added field to edit to make desired changes
	<ul style="list-style-type: none"> • Field name • Additional text • Additional text location <ul style="list-style-type: none"> ○ Below Answer ○ Right of field name ○ Below field name • Default • Require – Yes or No • Hidden – Yes or No • Read only – Yes or No • Validation – Yes or No
11.1	If Validation is set to Yes, the following settings will be enabled for updating:
	<ul style="list-style-type: none"> • Allow <ul style="list-style-type: none"> ○ Any character ○ Alpha/numeric ○ Alpha only ○ Numeric only ○ Exact value • Character limit • Exact Value
11.2	Click Update

MARQUIS

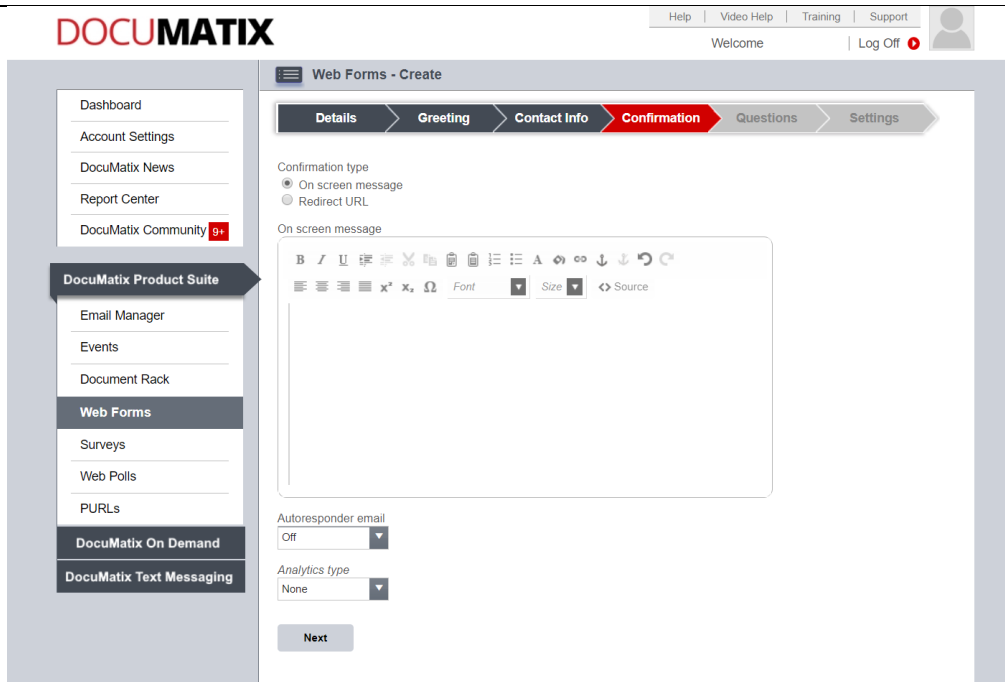
11.3 If a field was added in error, simply click the **X** next to it in the **Contact Information** box. Click **Yes** to the confirmation message.












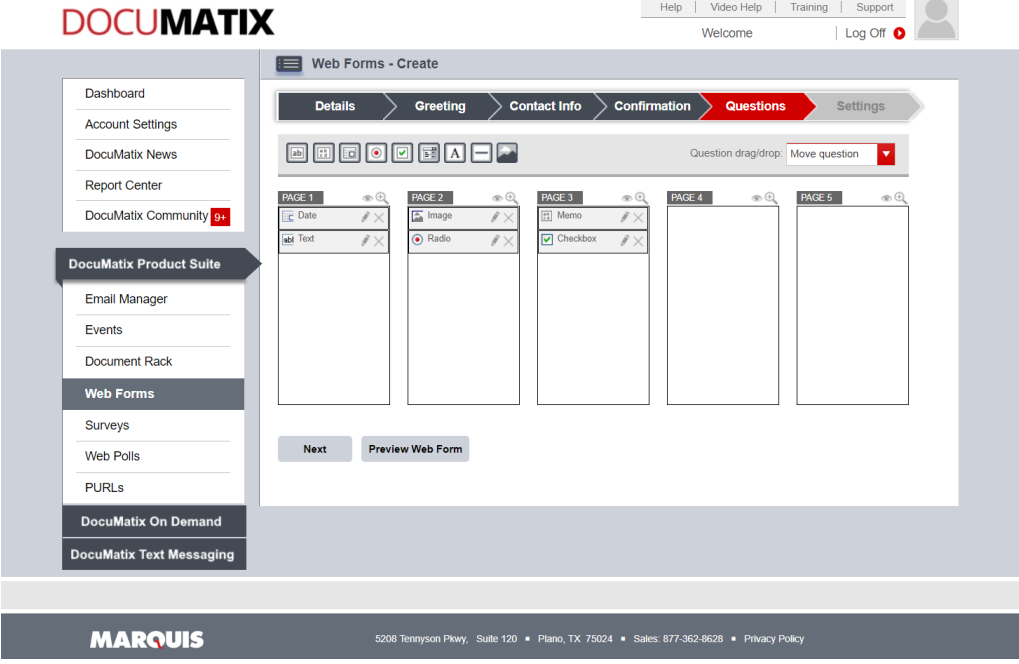
Step 12 Click “**Next**” once all necessary fields are selected and their settings have been made

Step 13 Complete the “**Confirmation**” page

- Confirmation type
 - On screen message
 - Redirect URL
- Autoresponder email
- Analytics type (optional)



MARQUIS

Step 14	Click "Next"
Step 15	Complete the "Questions" page
Step 16	Select an icon that corresponds to the function desired by "Click, Drag, and Drop" the icon into the desired page of the web form being created
	<ul style="list-style-type: none"> •  Text
	<ul style="list-style-type: none"> •  Memo
	<ul style="list-style-type: none"> •  Date
	<ul style="list-style-type: none"> •  Radio
	<ul style="list-style-type: none"> •  Checkbox
	<ul style="list-style-type: none"> •  Drop down
	<ul style="list-style-type: none"> •  Custom Text
	<ul style="list-style-type: none"> •  Line
	<ul style="list-style-type: none"> •  Image
	
Step 17	Click "Next"
Step 18	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"> • Web Form width
	<ul style="list-style-type: none"> • Next button text
	<ul style="list-style-type: none"> • Previous page button text
	<ul style="list-style-type: none"> • Last page button text
	<ul style="list-style-type: none"> • Color selections
	<ul style="list-style-type: none"> • Footer (optional)

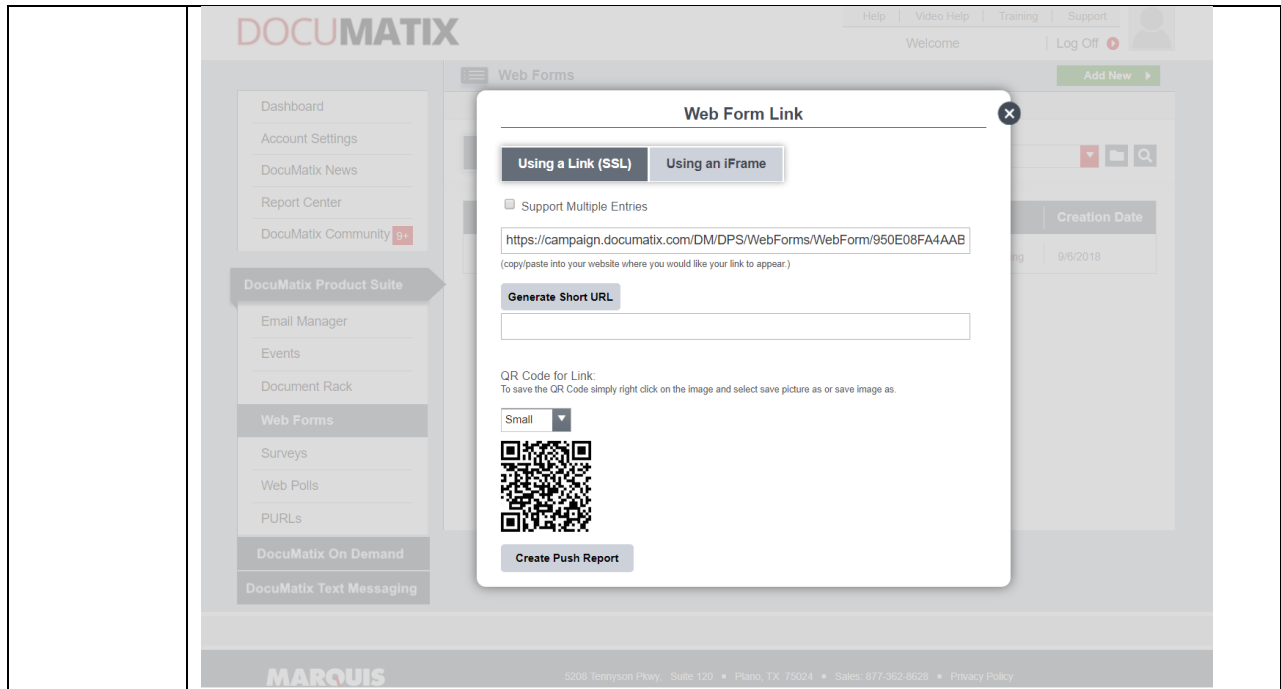
MARQUIS

- Show page progress on web form
- Show page 1 questions with contact information
- Save my current settings as default values

The screenshot displays the DocuMatix 'Web Forms - Create' interface. At the top, there are navigation links for Help, Video Help, Training, and Support, along with a 'Welcome' message and a 'Log Off' button. The main content area is titled 'Web Forms - Create' and features a progress bar with steps: Details, Greeting, Contact Info, Confirmation, Questions, and Settings (the current step). Below the progress bar, there are several settings sections: 'Choose Logo' with a 'Use Company Logo' button; 'Show logo' set to 'No'; 'Logo alignment' set to 'Left'; 'Submit button alignment' set to 'Left'; 'Web Form width' set to '700 px'; 'Next button text' set to 'Next'; 'Previous page button text' set to 'Back'; and 'Last page button text' set to 'Submit'. At the bottom, there is a color palette for various UI elements like body background, content background, button background, and text colors. A footer with a rich text editor toolbar is also visible.

Step 19	Click “Finish”
Step 20	Click on the Web Form and click “Publish”
Step 21	Click “Yes”
Step 22	A Survey Link page will appear with all of the link information regarding the web form.

MARQUIS



	If desired, there is an option to create a Push Report for the survey. Move to the next step if that is something you would like to setup.
Step 23	Click “Create Push Report”
Step 24	Complete “Add Push Report” page
	<ul style="list-style-type: none"> • Report Type
	<ul style="list-style-type: none"> • Web Forms
	<ul style="list-style-type: none"> • Push report name
	<ul style="list-style-type: none"> • Email addresses
	<ul style="list-style-type: none"> • Push report start date
	<ul style="list-style-type: none"> • Push report expire date
	<ul style="list-style-type: none"> • Frequency
	<ul style="list-style-type: none"> • Days of the week
	<ul style="list-style-type: none"> • Time of the day
Step 25	Click “Submit”