

MARQUIS

DMX347 DocuMatix On Demand Marketing Automation

This procedure will cover how to build a Marketing Automation campaign. If using behavior conditions, it is important to setup the WebTrax page tracking prior to activating or establishing the Marketing Automation process. This allows WebTrax to use the embedded links in email campaigns and once the customer clicks the link, they're identified, and tracked.

Order of Steps **Tasks**

Step 1 Create a flow chart to determine the campaigns and rules for each campaign as well as what data fields will be needed in the extract.

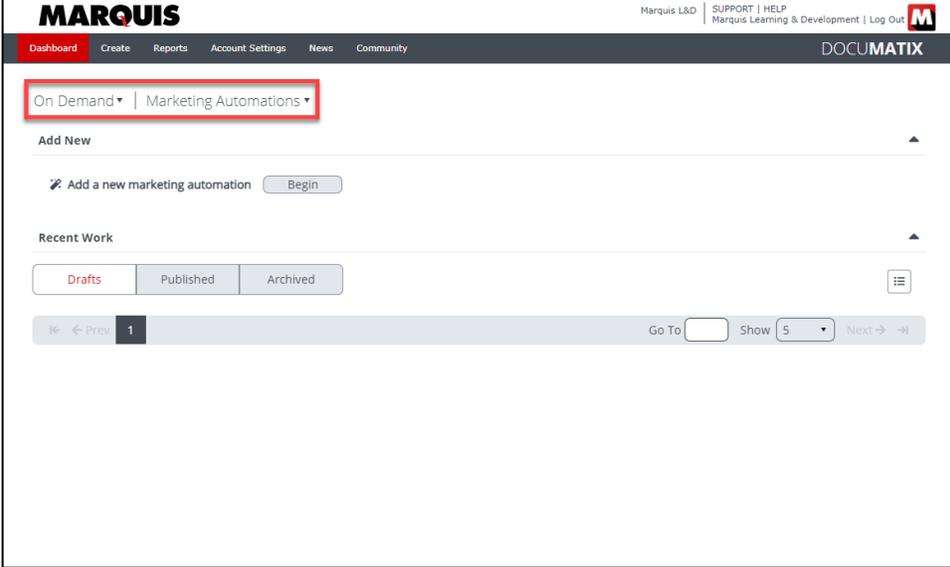
Description	Code	Subject Line	Rule 1	Rule 2	Rule 3	Rule 4
Onboarding Welcome/eServices	A		1 day from open date	age 18+		
Onboarding Checking	B		7 days from open date	age 18+	no checking	
Onboarding Credit Card	C		14 days from open date	age 18+	no credit card	
Onboarding Auto Loans	D		30 days from open date	age 18+	no auto loans	
Onboarding Mortgage						
Onboarding Investment/Savings						
Reboarding Thank You						
Reboarding Checking						
Reboarding Credit Card						
Reboarding Auto Loans						
Reboarding Mortgage						
Reboarding Investment/Savings						

After defining the flow chart and requirements for each campaign, the Marketing Automation can be built.

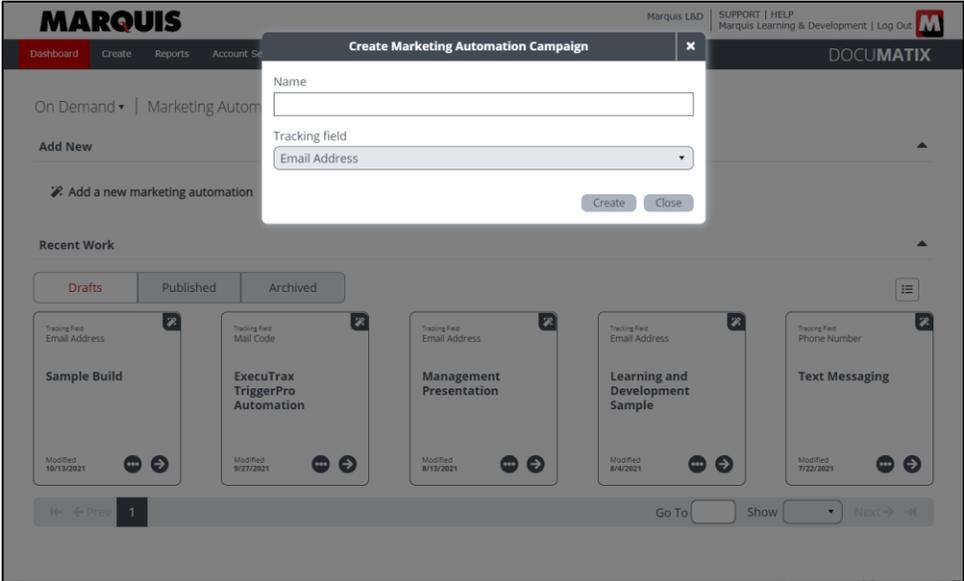
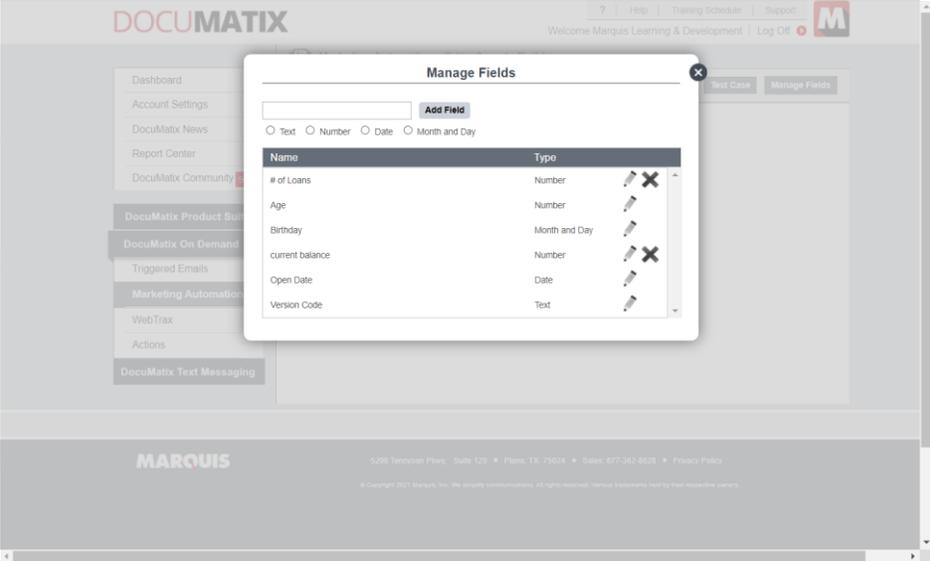
Step 2 Log into **DocuMatix**

Step 3 Use the product drop-down arrow to select **On Demand**

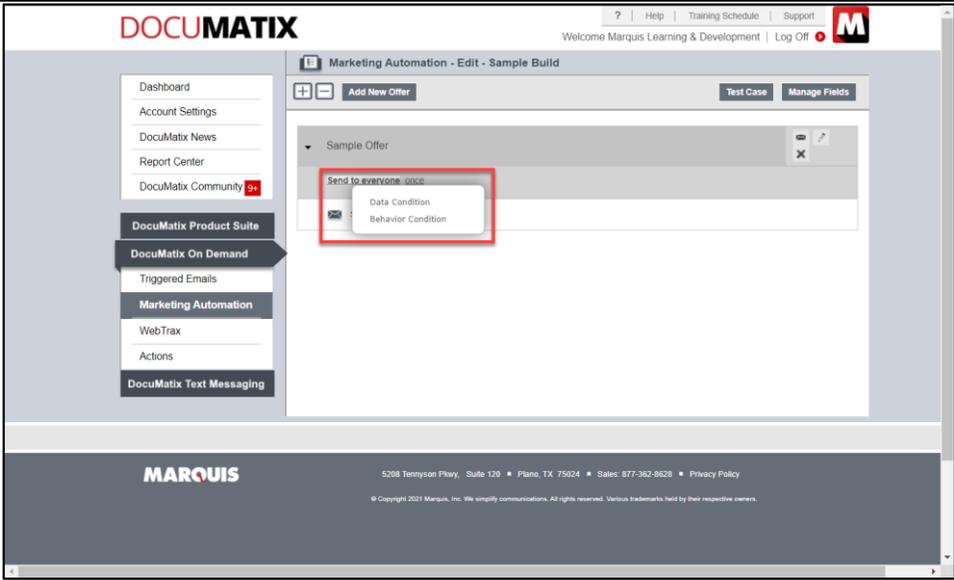
Step 4 Use the module drop-down arrow to select **Marketing Automations**



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Step 5	Click Begin to add a new Marketing Automation
Step 6	Type a name for the Marketing Automation Campaign
Step 7	Select a field to track on
Note: The tracking field is used to count how many times a record receives an offer. By default, email address is available. If something different will be used, Custom must be selected.	
Step 8	Click Create
	
Step 9	Click Manage Fields in the upper right-hand side of the page
Step 10	To add a field, click in the box and type a name
10.1	Select the format of the field being added: Text, Number, Date, Month and Day
10.2	Click the Add Field button to add it to the list
	
Step 11	To remove a field from the list, click the X next to a specific field
11.1	Click Yes to the confirmation message
Step 12	To edit a field from the list, click the pencil icon next to a specific field

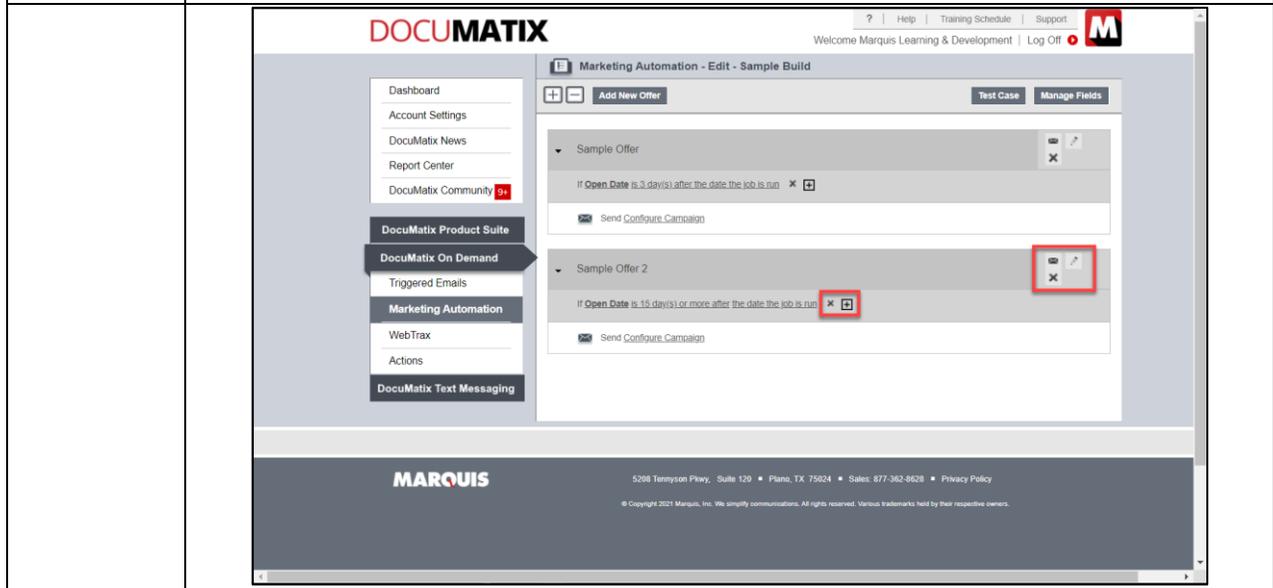
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12.1	Make the necessary changes
12.2	Click OK
Note: The fields must be managed to ensure the proper fields are in place for any rules to be applied to the campaigns.	
Step 13	To add an email campaign, click Add New Offer
13.1	Type in the offer name
13.2	Click the drop-down arrow to choose the Maximum Sends
13.3	Click Create
Step 14	The default condition on the campaign will be Send to everyone once
Step 15	To modify the condition, click on Send to everyone once
	 <p>The screenshot shows the DocuMatix Marketing Automation interface. On the left is a navigation menu with options like Dashboard, Account Settings, and Marketing Automation. The main area is titled 'Marketing Automation - Edit - Sample Build'. A dropdown menu is open, showing 'Send to everyone once' selected, with options for 'Data Condition' and 'Behavior Condition' below it. A red box highlights the 'Send to everyone once' option.</p>
Step 16	For a field condition, click Data Condition
16.1	Select a field from the list for the condition to be applied to
16.2	Click Next
16.3	Select an Operator
16.4	Click Next
16.5	Choose the Value
16.6	Click Finish
Step 17	To add another condition, click the plus symbol + and repeat the previous steps
	Once all conditions are in place, the next offer can be added
Step 18	Click Add New Offer
18.1	Type in the offer name
18.2	Click the drop-down arrow to choose the Maximum Sends
18.3	Click Create
Step 19	Repeat previous steps to build out conditions
Note: If the conditions or setup from a previous offer in the Decision Tree can be used, click the Copy box. This will allow for a faster setup process. Select the desired offer to copy from the list and make any necessary changes after the copy is created.	

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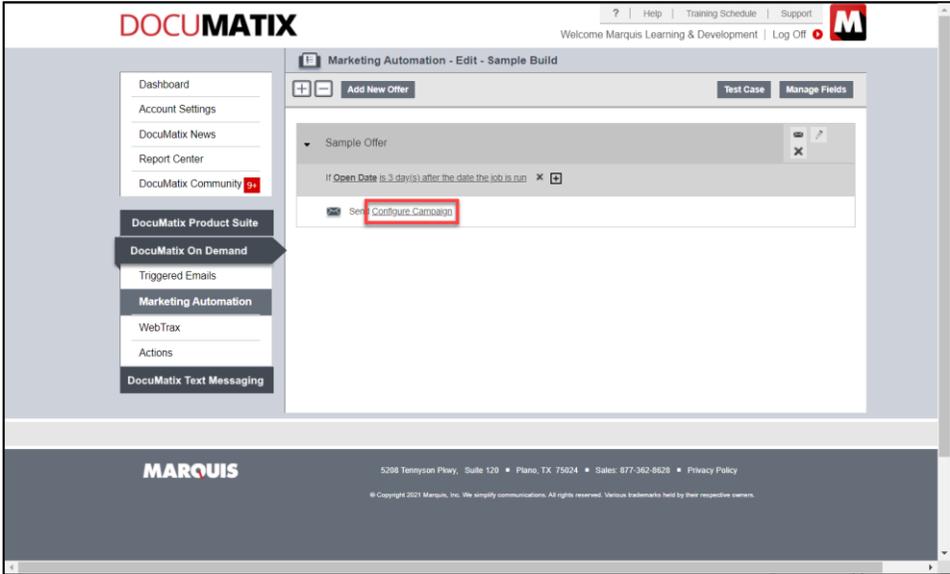
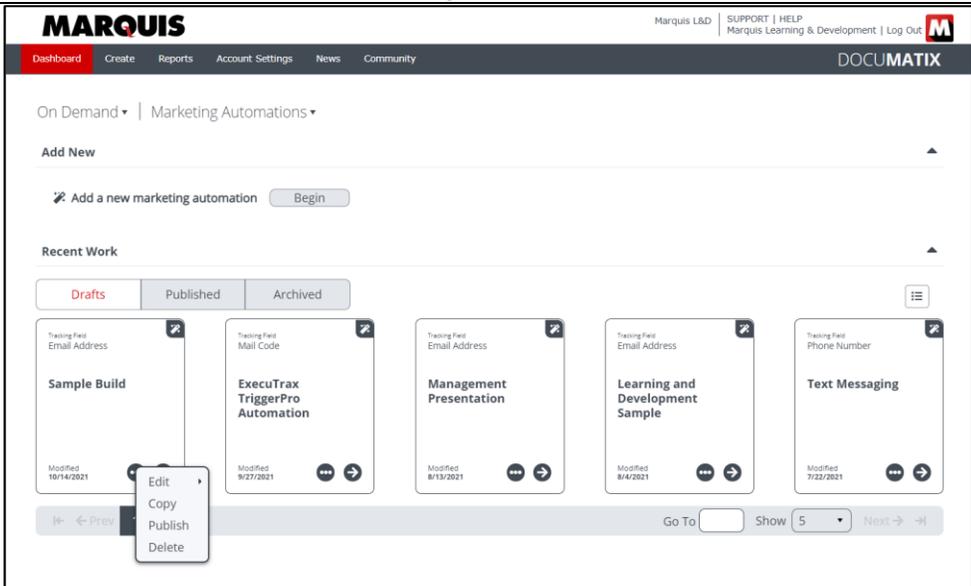


Step 20	To remove a condition, click the X to the right of the condition
20.1	Click Yes to complete the removal process
Step 21	To remove an offer , click the X located to the right of the offer box
21.1	Click Yes to complete the removal process
Step 22	To edit the offer settings , click the pencil icon to the right of the offer box
22.1	Make the desired changes
22.2	Click Update



Step 23	Once an offer is setup, select the campaign
Step 24	Within the offer, click Configure Campaign
24.1	Click Configure Campaign
24.2	Click the drop-down arrow to select the Delivery Type
24.3	Select when to Deliver Mail
24.4	Click Next

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24.5	Click the drop-down arrow to select a campaign
24.6	Click Finish
	 <p>The screenshot shows the DocuMatix interface for editing a marketing automation campaign. The left sidebar contains navigation options like Dashboard, Account Settings, and Marketing Automation. The main content area shows a campaign configuration for 'Sample Offer' with a trigger condition 'If Open Date is 3 day(s) after the date the job is on'. A 'Configure Campaign' button is highlighted with a red box.</p>
	Once setup is complete, the Marketing Automation is ready to be Published
Step 25	Click Dashboard
Step 26	Click the Options icon on the Marketing Automation card within Drafts
Step 27	Click Publish
27.1	Click Yes to the confirmation message
	 <p>The screenshot shows the Marquis Dashboard with a 'Marketing Automations' section. Under 'Recent Work', there are five cards: 'Sample Build', 'ExecuTrax TriggerPro Automation', 'Management Presentation', 'Learning and Development Sample', and 'Text Messaging'. The 'Sample Build' card has a context menu open with options: Edit, Copy, Publish, and Delete. The 'Publish' option is highlighted.</p>
<p>Once the Marketing Automation setup has been complete and Published, the configuration to automate the Marketing Automation within DocuMatix on Demand must be completed within the Configuration Tool on your server. Those procedures can be found within the DocuMatix Configuration Tool procedural document.</p>	