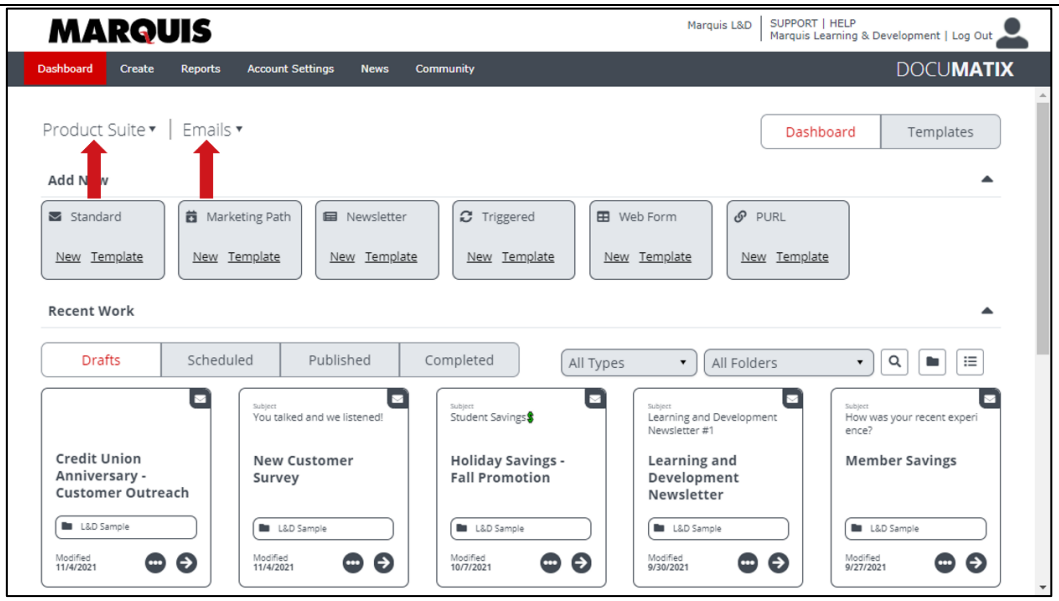
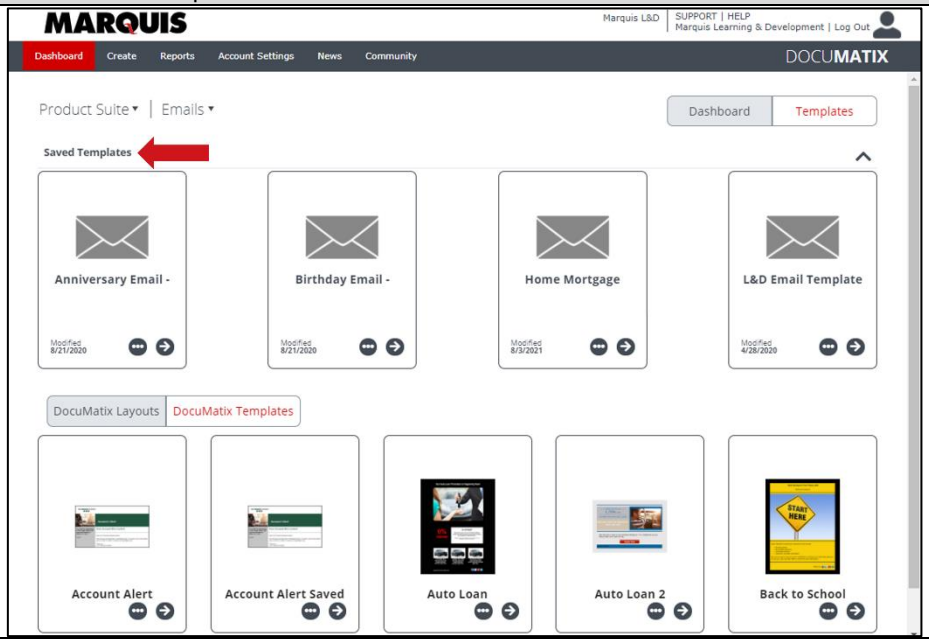
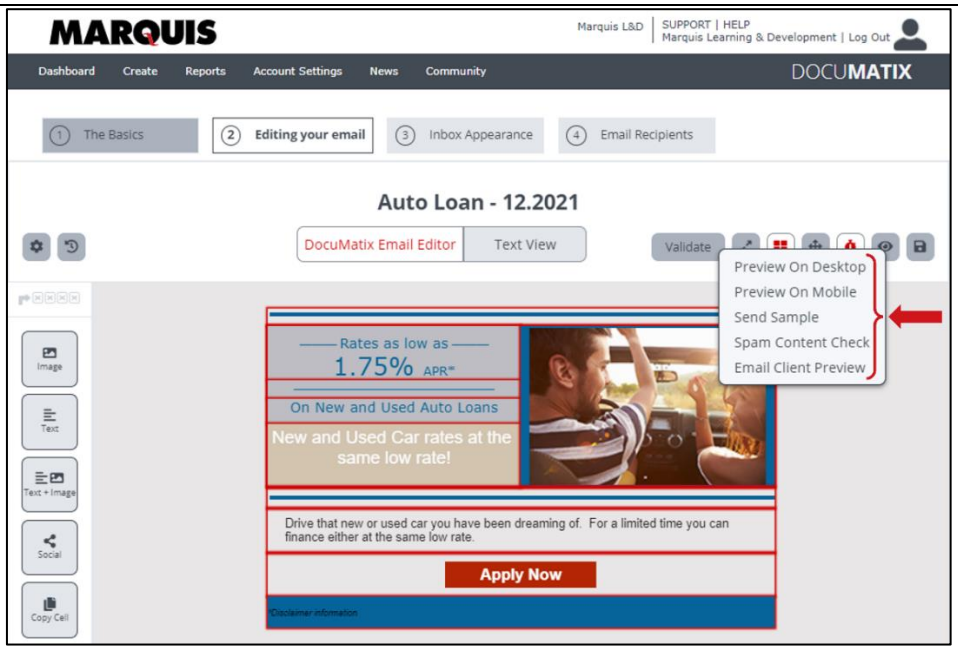
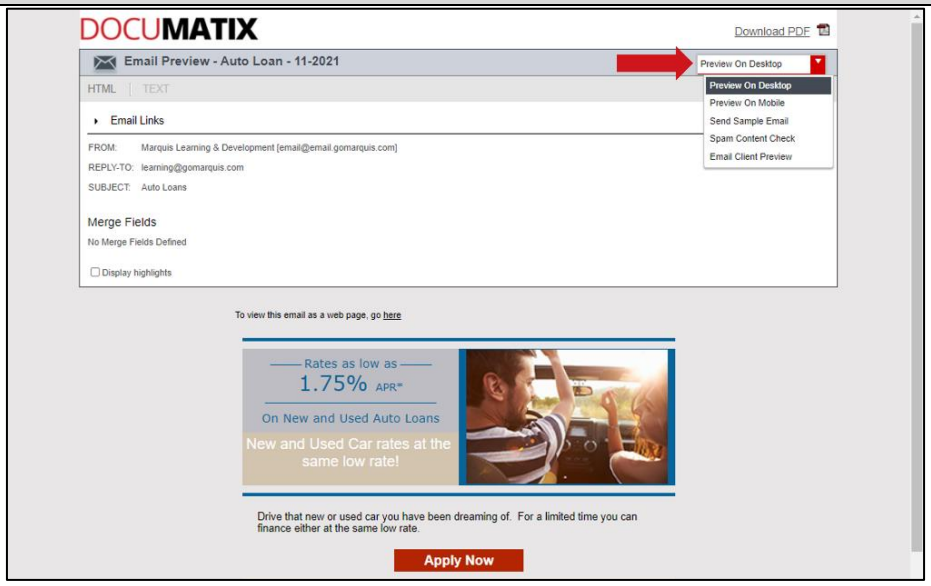
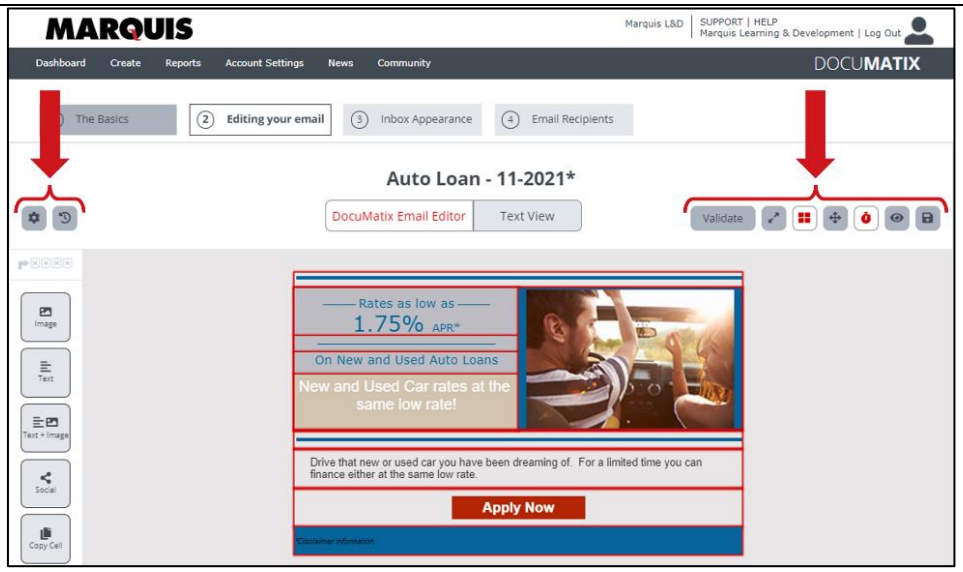
DMX304	Accessing Saved Templates
Order of Steps	**Tasks**
Step 1	Log into **DocuMatix**
Step 2	Select the **Product Suite** product and the **Emails** module
	
Step 3	Choose the desired email type
Step 4	Under the **Add New** section, click **Template** on the appropriate card
Step 5	Under **Saved Templates** (created by users within the institution), click the **Create** icon on the desired template
Note: In addition to the **Create** icon, the **Options** icon gives you the ability to **Edit**, **Rename**, **Delete**, and **Preview And Test** templates.	
	

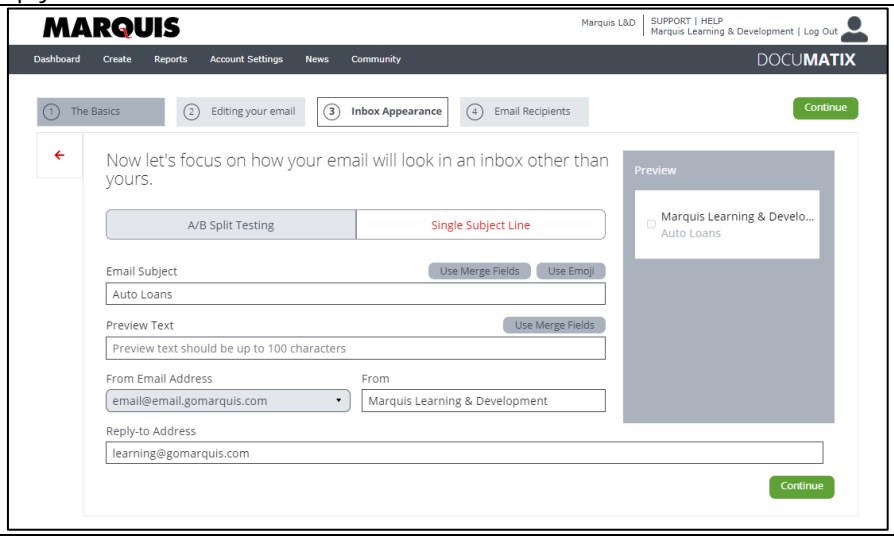
MARQUIS

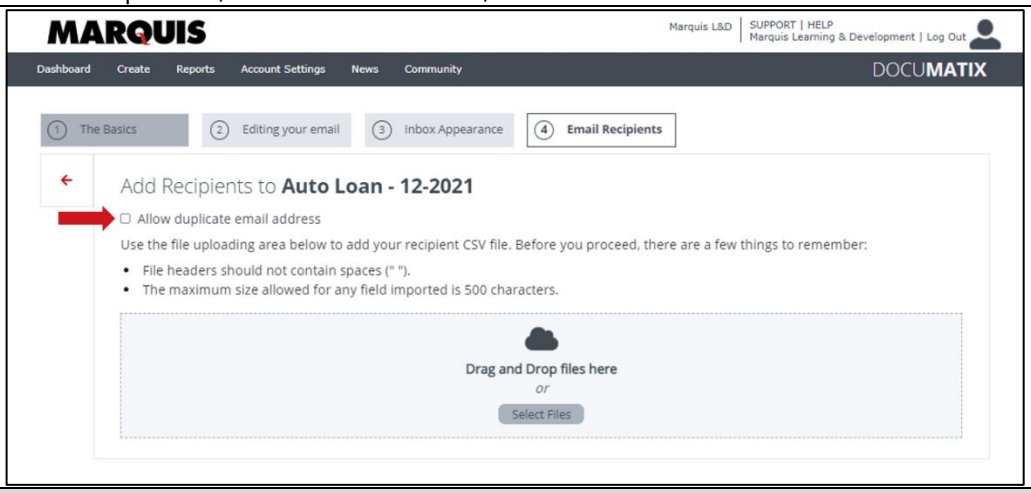
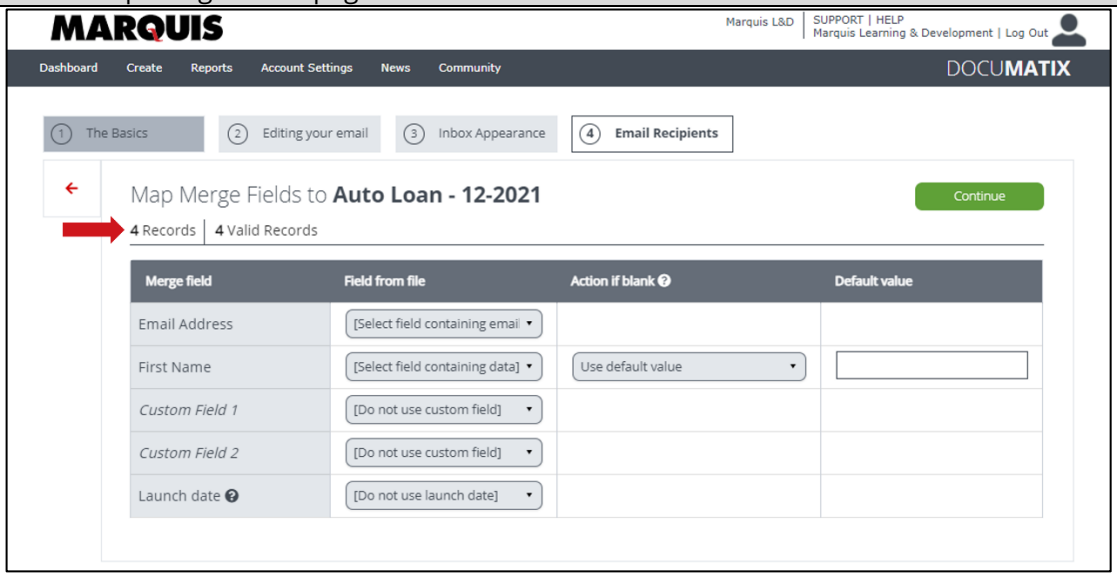
Step 6	Complete or make modifications to **The Basics** page
Note: Anything in italics is an optional field as noted below. Some of the fields will auto populate from Account Settings.	
	• Name
	• Description (optional)
	• Store your email in a folder
Step 7	Click **Continue** to advance to the **Editing your email** page
Step 8	Make any changes to the existing items in the template
Step 9	Select an icon that corresponds to the function desired by "Click, Drag, and Drop" the icon into the body of the email being created
	Image
	Text
	Text + Image
Note: When utilizing an IMAGE within the email, the Alt Text (required field) will need to contain text that describes what the image represents as it is used when emails are viewed through a viewing impaired app.	
	Social
	Copy Cell
	Web Poll
	Submit Button
	• Video
	• Divider
Step 10	Click and adjust email parameters as needed
	• Toggle Gridlines
	• Toggle Resize
	• Settings
Step 11	Hover over each cell to **Edit, Move,** or **Delete**
	• Edit
	• Move
	• Delete
Step 12	To Preview, click the **Preview icon**

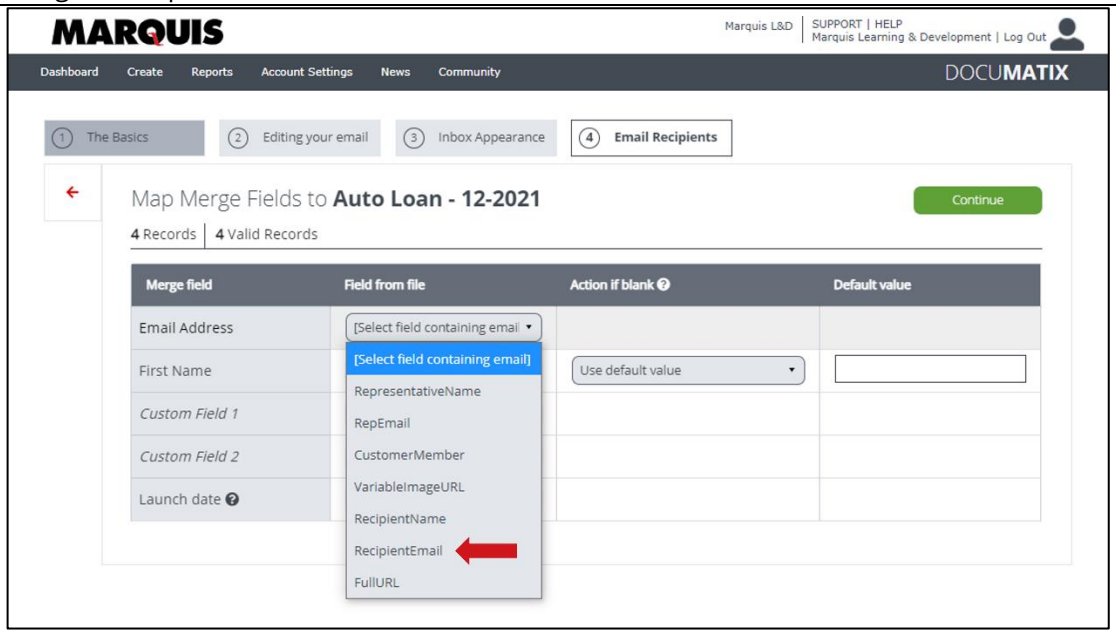
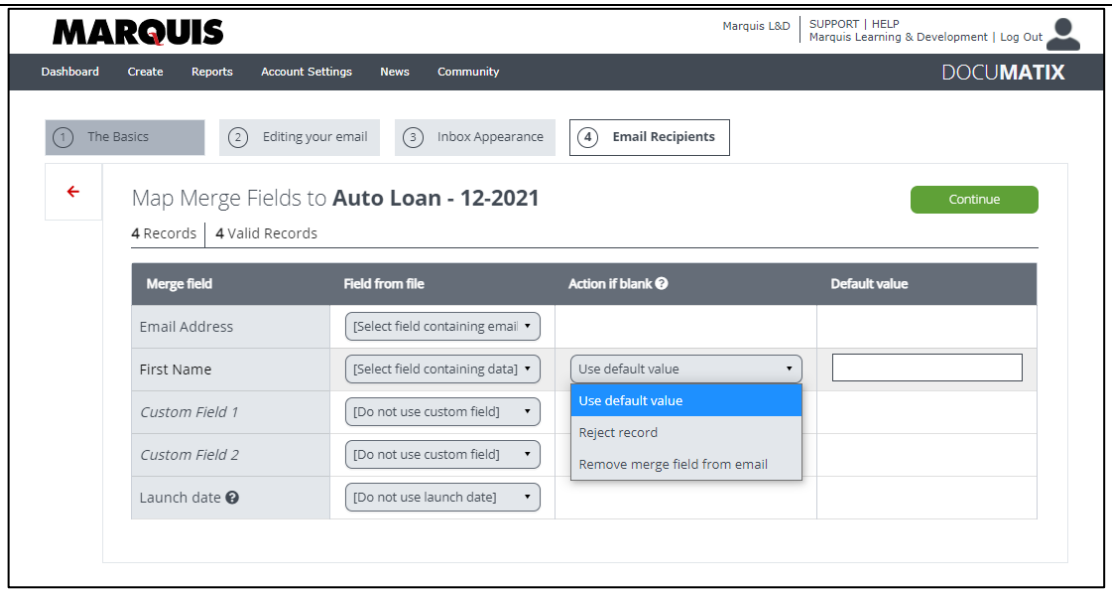
Step 13	Select from the following options: • Preview On Desktop • Preview On Mobile • Send Sample • Spam Content Check • Email Client Preview
	
Note: The preview opens in a new browser window. From that window, you can toggle between preview options. Click on the preferred testing Method. The test email will appear in a new browser tab.	
	
Step 14	If a misstep was made and the changes need to be reset, return to the original browser tab, and click on the **History** button

14.1	Hover over the versions in **Email History**
14.2	Click **View** to preview the version for each email
14.3	Once the desired version is found, click **Revert**
Step 15	The system autosaves every minute, but we recommend clicking on **Save** on the right side of the menu bar
	

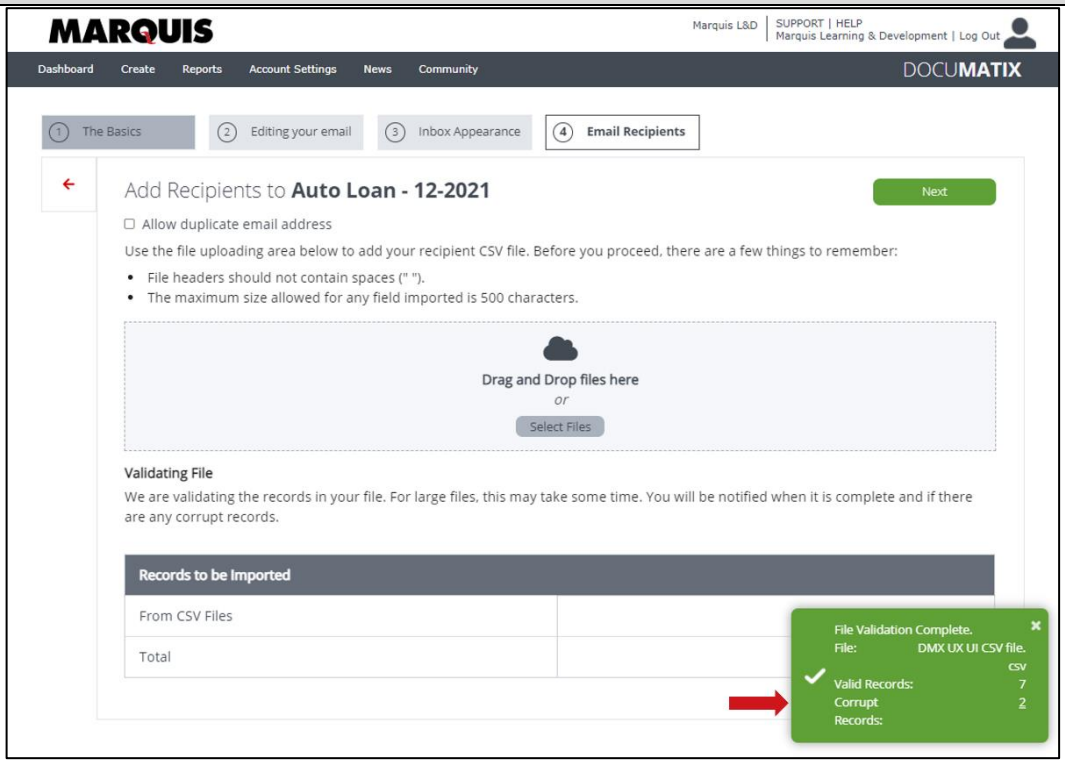
Note: Clicking the Validate button is optional, but recommended before proceeding, as this will save time when the email is scheduled for launch. Clicking Validate will identify any missing pieces (e.g., required alt text) or invalid links. If this step is skipped now, validation will happen automatically when the email is scheduled for launch.

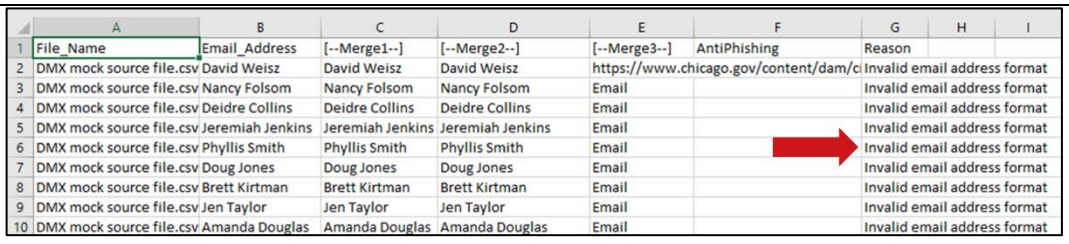
Step 16	Click the **Inbox Appearance** in the top center of the page
Step 17	Complete the **Inbox Appearance** page
	• Email Subject, if needed **Use Merge Fields** and **Use Emoji**
	• Preview Text, if needed **Use Merge Fields**
	• From
	• Reply-to Address
	

Step 18	Click **Continue** to advance to the **Email Recipients** page
Note: Not every type of email will have the **Email Recipients** page.	
Step 19	**Drag and Drop** the file into the box or click **Select Files** to browse and select the desired file
Note: The data file must be in a CSV format with the header row located within the first row. The header row cannot contain spaces, numbers, or special characters.	
Step 20	To include duplicates, select the check box, if desired
	
Note: At the completion of the data file being uploaded, the record information will appear under the header of the Map Merge Fields page.	
	

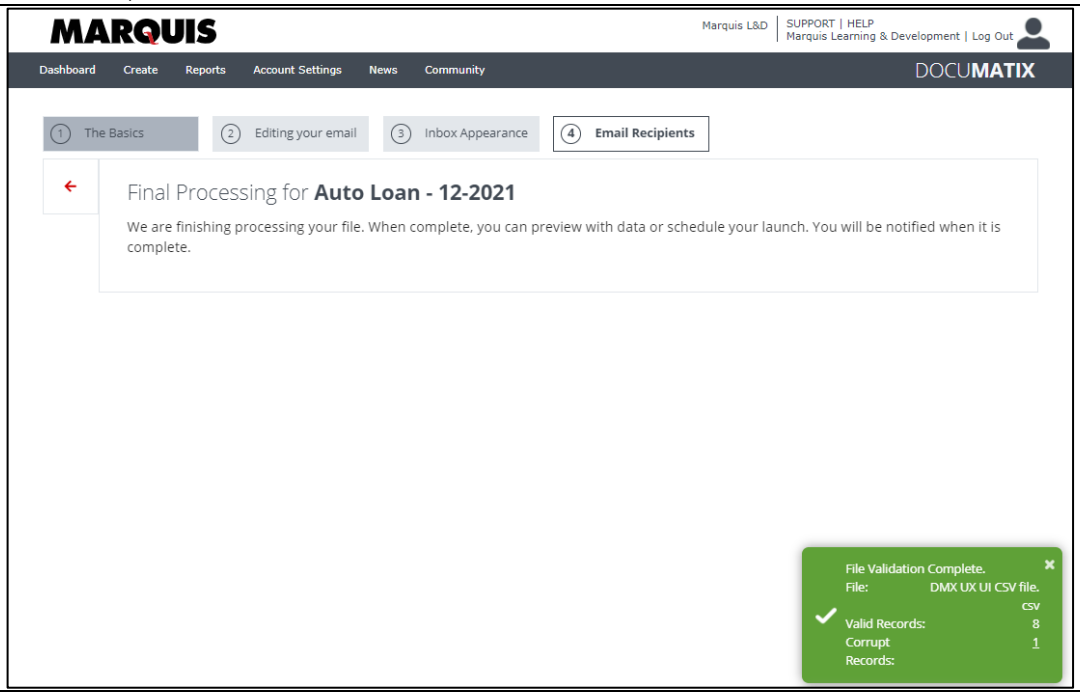
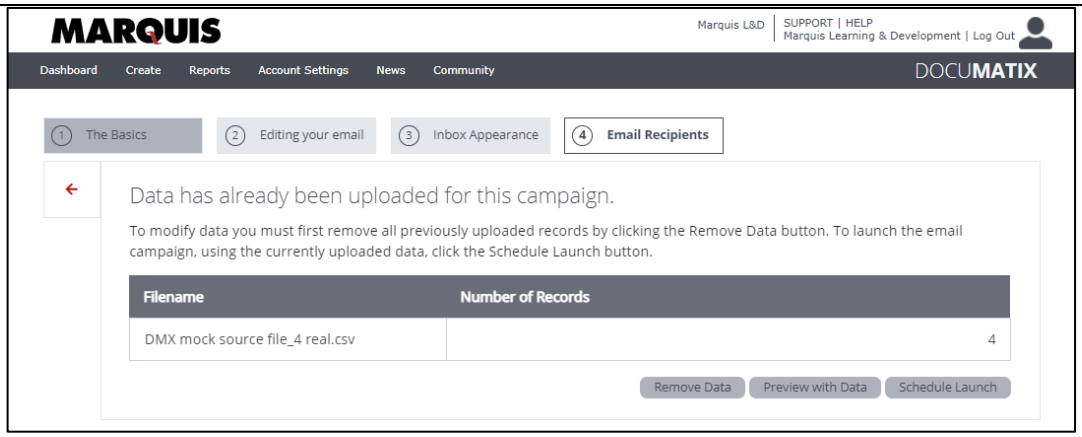
Step 21	Complete the **Map Merge Fields** page
Note: Mapping is the process of aligning the merge fields created within DocuMatix to the header fields contained in the CSV file.	
21.1	Using the drop-down arrow, select the **Email Address** from the list
	
21.2	Use the drop-down arrow to select the appropriate field for each required merge field
21.3	Use the drop-down arrow to select the desired Action if blank:
	• **Use default value**: The default value entered will be used in place of a custom value
	• **Reject record**: The email will not be sent to that recipient
	• **Remove merge field from the email**: The merge field will be removed from the email
	
21.4	If "Use Default Value" action is selected, enter the desired text into the **Default value** field

21.5	Select the optional fields, if desired
Note: The Merge fields containing "Custom Field" in the name are optional data fields that can be populated for reporting capabilities but will not be placed in the email.	
21.6	Select the launch date if one is present in the file
Note: When selecting a launch date field, if a record contains a blank in the Launch Date field, the email will not be sent out.	
21.7	Click **Continue**.
Note: If the data file contains **Invalid** and/or **Corrupt Records**, they will be automatically removed, and the file will be uploaded. Clicking the underlined number to the right of **Corrupt Records** will open an Excel file which provides reasons the records were classified as corrupt. **Invalid Records** indicate there is missing data and **Corrupt Records** indicate that an email address is not in the correct format.	





	A	B	C	D	E	F	G	H	I
1	File_Name	Email_Address	[--Merge1--]	[--Merge2--]	[--Merge3--]	AntiPhishing	Reason		
2	DMX mock source file.csv	David Weisz	David Weisz	David Weisz	https://www.chicago.gov/content/dam/c		Invalid email address format		
3	DMX mock source file.csv	Nancy Folsom	Nancy Folsom	Nancy Folsom	Email		Invalid email address format		
4	DMX mock source file.csv	Deidre Collins	Deidre Collins	Deidre Collins	Email		Invalid email address format		
5	DMX mock source file.csv	Jeremiah Jenkins	Jeremiah Jenkins	Jeremiah Jenkins	Email		Invalid email address format		
6	DMX mock source file.csv	Phyllis Smith	Phyllis Smith	Phyllis Smith	Email		Invalid email address format		
7	DMX mock source file.csv	Doug Jones	Doug Jones	Doug Jones	Email		Invalid email address format		
8	DMX mock source file.csv	Brett Kirtman	Brett Kirtman	Brett Kirtman	Email		Invalid email address format		
9	DMX mock source file.csv	Jen Taylor	Jen Taylor	Jen Taylor	Email		Invalid email address format		
10	DMX mock source file.csv	Amanda Douglas	Amanda Douglas	Amanda Douglas	Email		Invalid email address format		

Step 22	To continue, click **Next**
	
Step 23	Click **Schedule Launch**. For more information, please refer to procedure **DMX375 How to Schedule an Email Launch**.