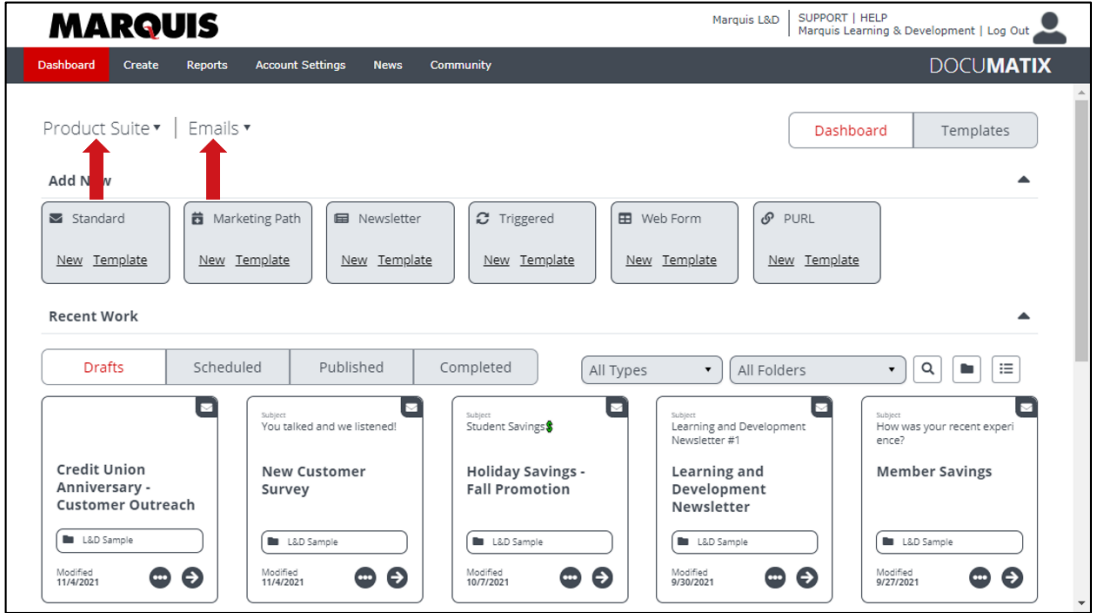
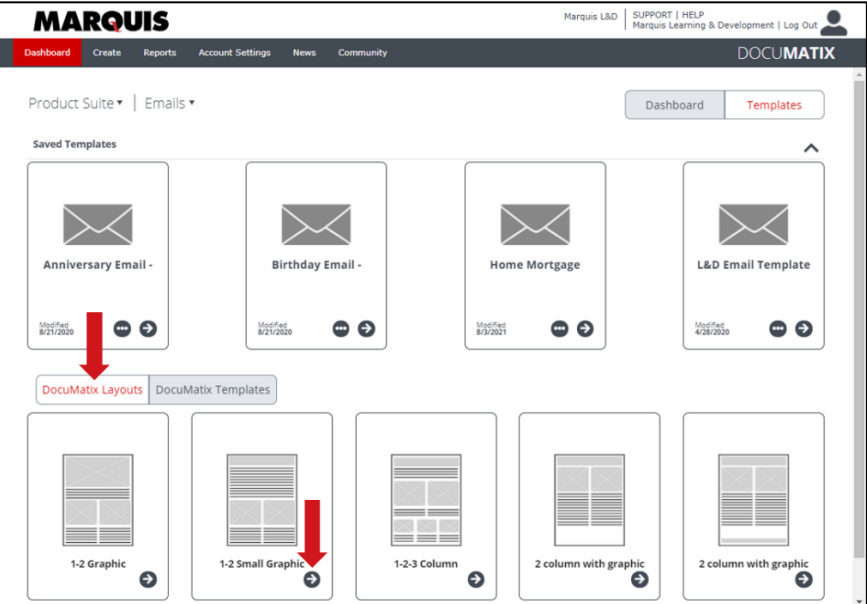


















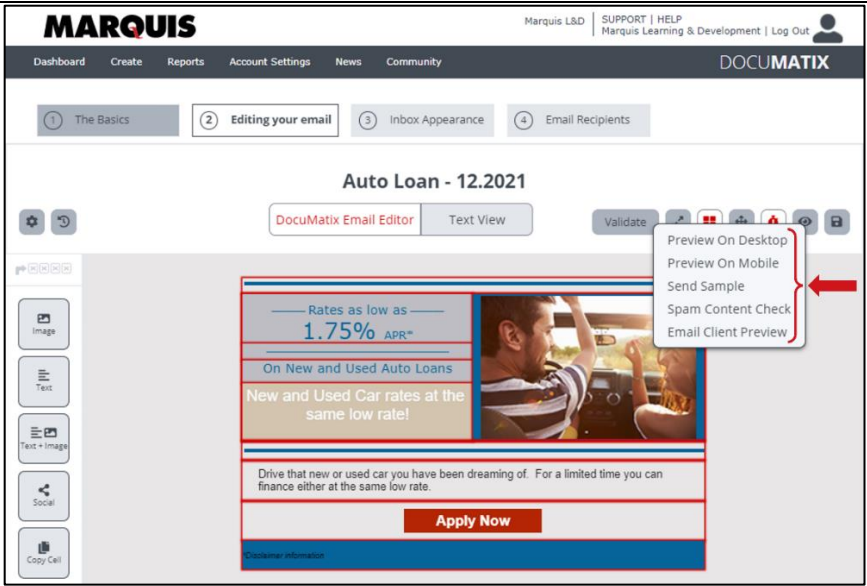
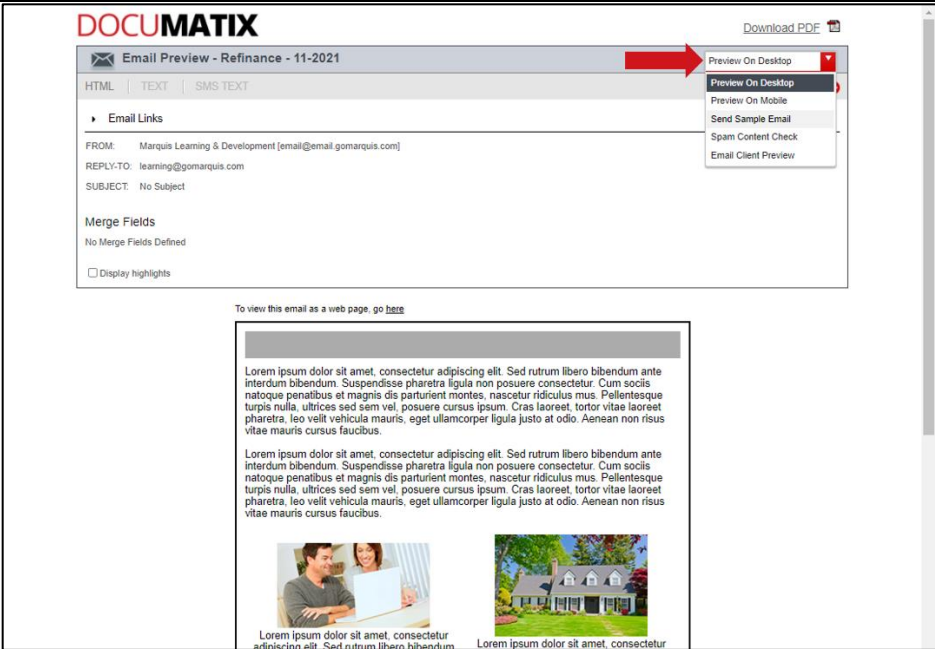
MARQUIS

MX329	Creating a Triggered Email Using a Layout
	Use this step-by-step process to create a new Triggered Email using a layout.
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Emails module
	
Step 3	Under the Add New section, click Template on the Triggered card
Step 4	Under the second section, toggle to DocuMatix Layouts , choose the desired layout, and click the Create icon ➡
	





MARQUIS

Step 5	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.	
	<ul style="list-style-type: none"> Name
	<ul style="list-style-type: none"> Description (optional)
	<ul style="list-style-type: none"> Store your email in a folder
	<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.	
Step 6	Click Continue to advance to the Editing your email page
Step 7	Make any changes to the existing items in the template
Step 8	Select an icon that corresponds to the function desired by "Click, Drag, and Drop" the icon into the body of the email being created
	<ul style="list-style-type: none">  Image
	<ul style="list-style-type: none">  Text
	<ul style="list-style-type: none">  Text + 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">  Social
	<ul style="list-style-type: none">  Copy Cell
	<ul style="list-style-type: none">  Web Poll
	<ul style="list-style-type: none">  Submit Button
	<ul style="list-style-type: none">  Video
	<ul style="list-style-type: none">  Divider
Step 9	Click and adjust email parameters as needed
	<ul style="list-style-type: none">  Toggle Gridlines
	<ul style="list-style-type: none">  Toggle Resize
	<ul style="list-style-type: none">  Settings
Step 10	Hover over each cell to Edit, Move, or Delete
	<ul style="list-style-type: none">  Edit
	<ul style="list-style-type: none">  Move
	<ul style="list-style-type: none">  Delete

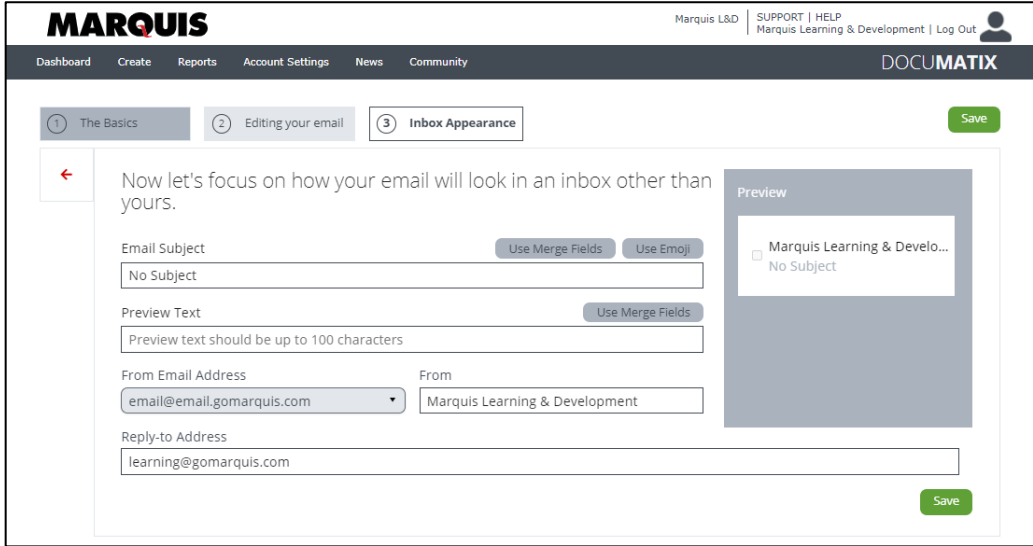

MARQUIS

Step 11	<p>To Preview, click the Preview icon </p>
Step 12	<p>Select from the following options:</p> <ul style="list-style-type: none"> • Preview On Desktop • Preview On Mobile • Send Sample • Spam Content Check • Email Client Preview
	
<p>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.</p>	
	

MARQUIS

Step 13	<p>If a misstep was made and the changes need to be reset, return to the original browser tab, and click on the History button </p>
13.1	Hover over the versions in Email History .
13.2	Click View for each email.
13.3	Once the desired version is found, click Revert .
Step 14	<p>The system autosaves every minute, but we recommend clicking on Save  on the right side of the menu bar</p>
	
<p>Note: Clicking the  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.</p>	
Step 15	Click the Inbox Appearance in the top center of the page

MARQUIS

Step 16	Complete the Inbox Appearance page
	<ul style="list-style-type: none"> Email Subject, if needed Use Merge Fields and Use Emoji Preview Text, if needed Use Merge Fields From Reply-to Address
	
Step 17	Click Save
Step 18	Click Dashboard from the main menu
Step 19	Once the email is complete, it must be published in order to be delivered
19.1	Click the Options icon 
19.2	Select Publish from the menu
	