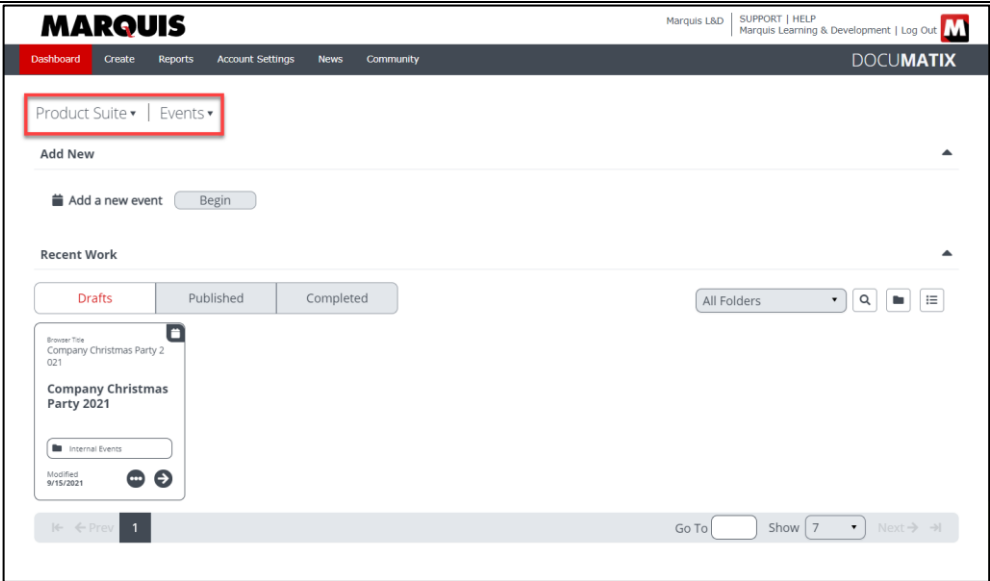
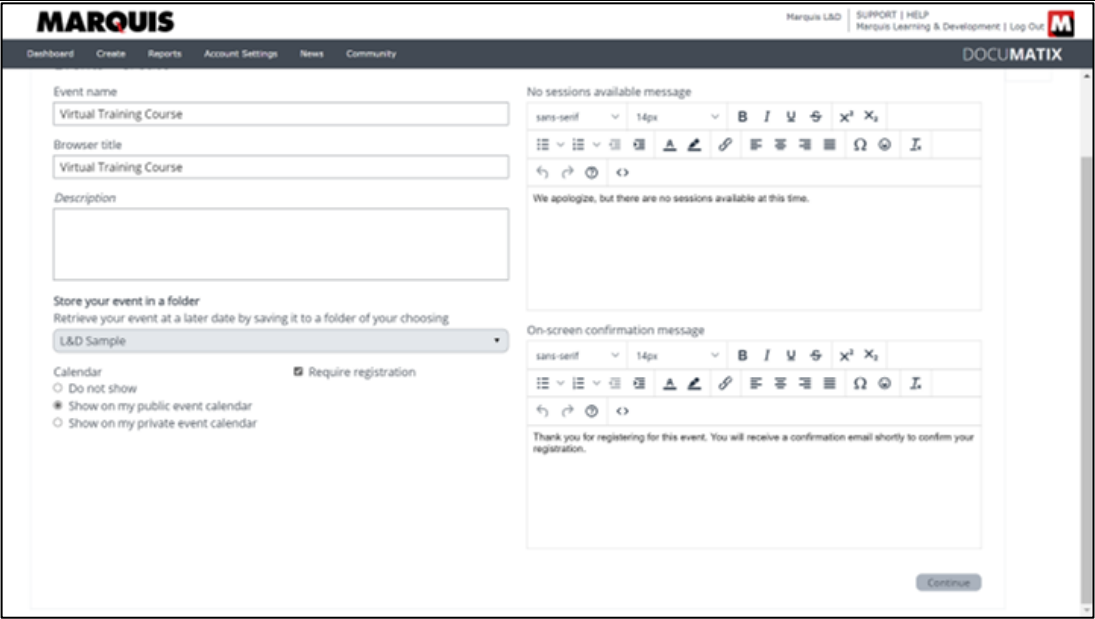
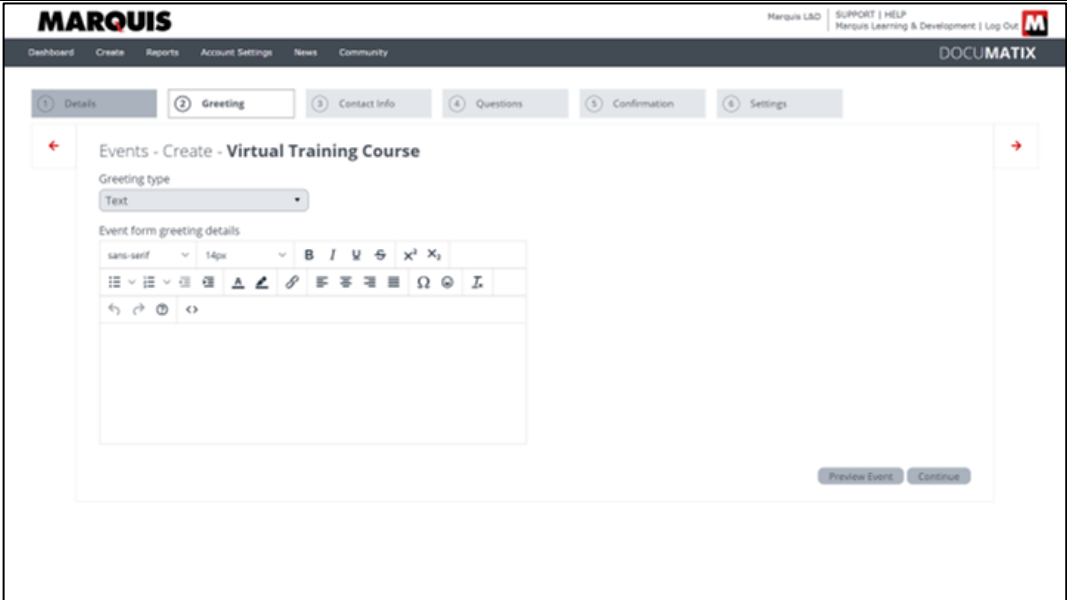


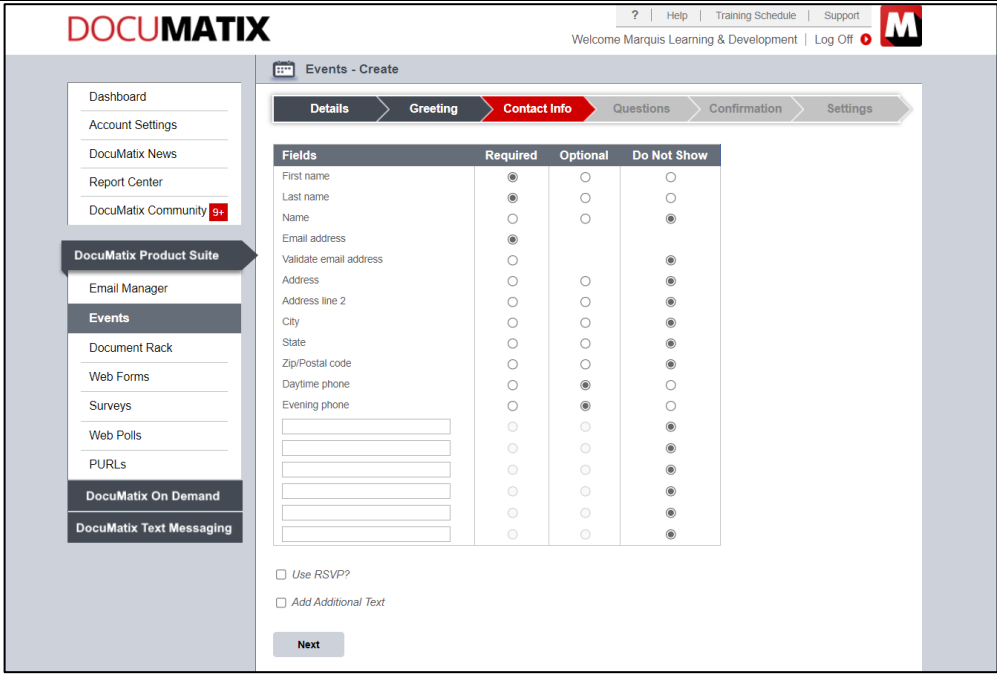
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DMX332	Creating an Event
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Use the product drop-down arrow to select Product Suite
Step 3	Use the module drop-down arrow to select Events
	 <p>The screenshot shows the Marquis DocuMatix dashboard. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. Below this, there's a dropdown menu for 'Product Suite' and 'Events', which is highlighted with a red box. Underneath, there's an 'Add New' section with a button 'Add a new event' and a 'Begin' button. Below that, there's a 'Recent Work' section with tabs for 'Drafts', 'Published', and 'Completed'. A card for 'Company Christmas Party 2021' is visible, showing a 'Browser Title' and 'Internal Events' section. At the bottom, there's a pagination bar with 'Go To', 'Show 7', and 'Next' buttons.</p>
Step 4	Click Begin to create a new Event
Note: Anything in <i>italics</i> within the design process is an optional field as noted below. Some fields may auto populate from Account Settings.	
Step 5	Complete the Detail page
5.1	Enter an Event name
5.2	The Browser title will auto populate. Modify the title, if desired
5.3	Enter a Description (optional)
5.4	Use the drop-down arrow for Place in Folder to select a folder to place the Event into
5.5	Enable/disable the Require Registration setting (optional)
Note: The Require Registration setting must be enabled in order to require attendees to register for your event. By default, it will be enabled.	
5.6	Select the appropriate Calendar selection
	<ul style="list-style-type: none"> • Do not show: the event will not appear on any calendar • Show on my public event calendar – everyone can see it • Show on my private event calendar – only the user can see it
5.7	Modify the No sessions available message , if desired (optional)
5.8	Modify the On-screen confirmation message , if desired (optional)

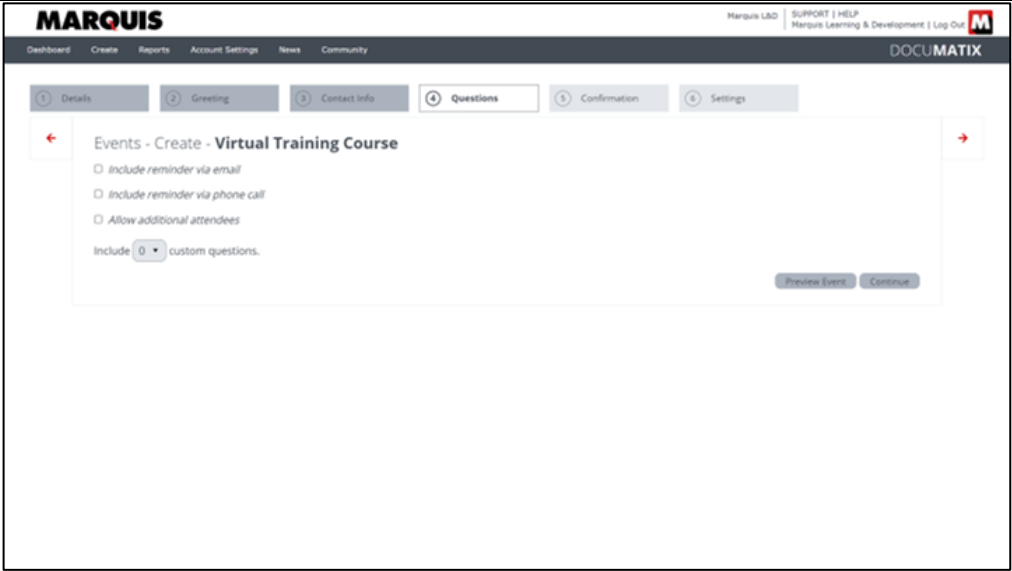
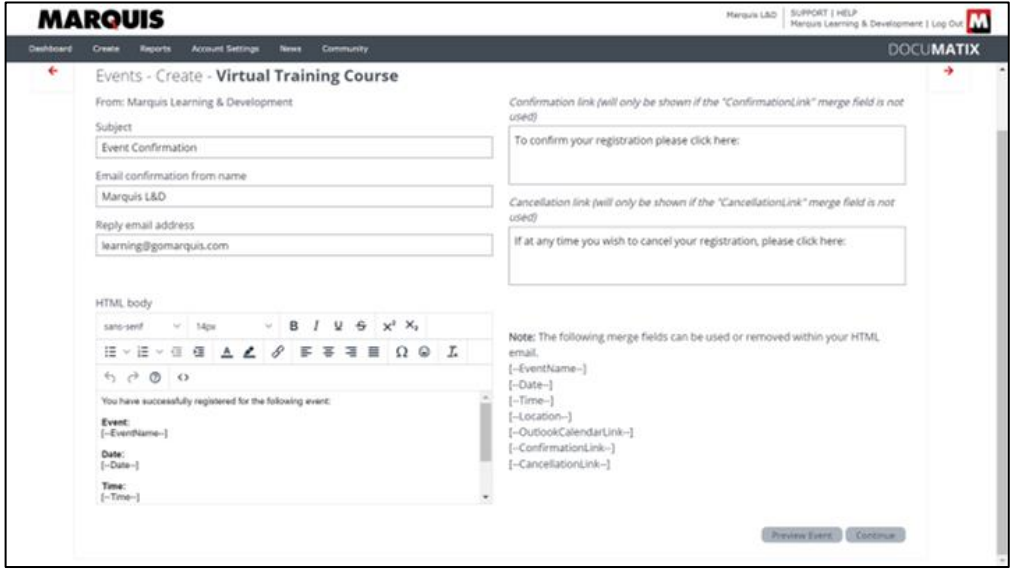
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Step 6	Once the selections are complete, click Continue
Step 7	Complete the Greeting page
7.1	Use the drop-down arrow to select the Greeting type
	The following settings will differ based on the Greeting type :
7.2	Click the Choose image button to upload or select an image from the DocuMatix and Graphics libraries
7.3	Use the Edit button to make further customizations to the selected image
7.4	Enter a short description of the image within the Image alt text box
7.5	Use the drop-down arrow to select the desired Event form graphic alignment
7.6	Enter in an Event form greeting details message if a Text type has been selected
	
Step 8	Click Continue

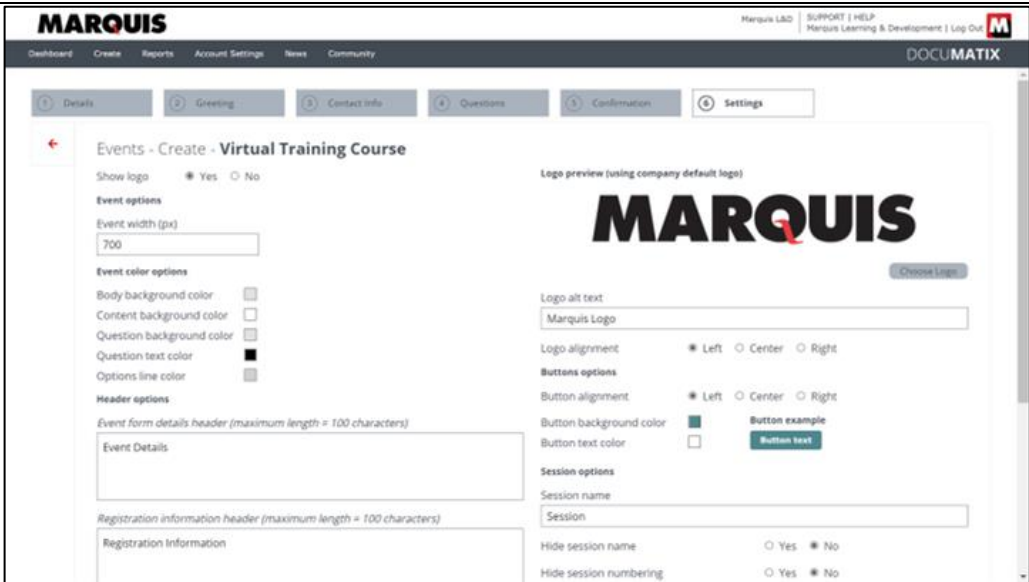
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Step 9	Complete the Contact Info page
9.1	Use the radio dials to select if each field is Required, Optional, or Do Not Show
Note: The blank field boxes at the bottom of the list are for custom fields. Simply enter the desired field names and select Required, Optional or Do Not Show.	
9.2	Enable/disable Use RSVP? (optional) to display an RSVP option to use to RSVP to the event
9.3	Enter text into the Add additional text (optional) box to provide instructions or additional information
	
Step 10	Click Continue
Step 11	Complete Questions page to determine if any questions will be presented to attendees
11.1	Enable the desired Reminder text box and edit the text, if desired
11.2	Enable the Additional Attendees text box and edit the text, if desired
11.3	If enabled, use the drop-down arrow to select the additional attendee limitation
11.4	Use the drop-down arrow to select the number of custom questions to include
11.5	If selected, edit each Custom question text box and enter the question

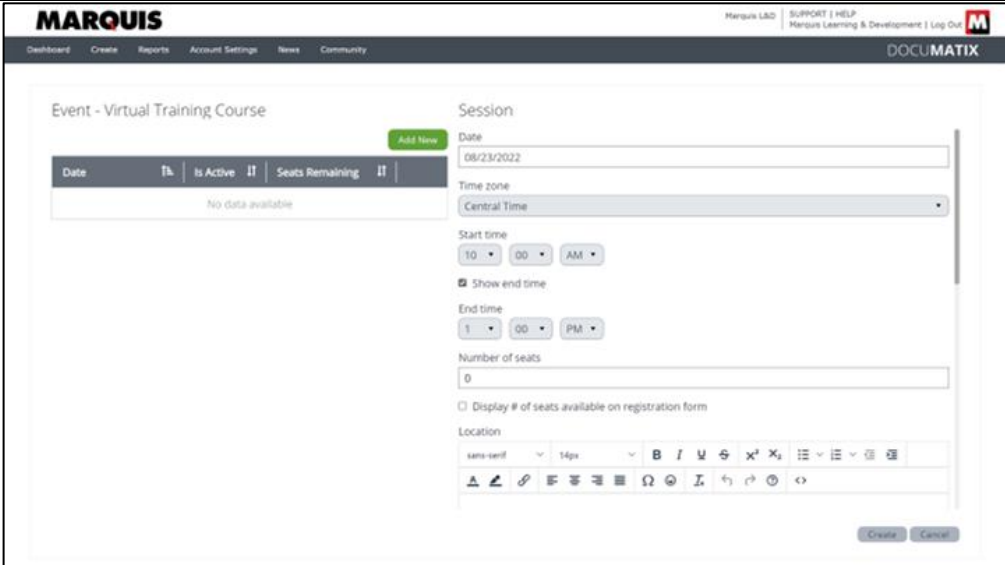
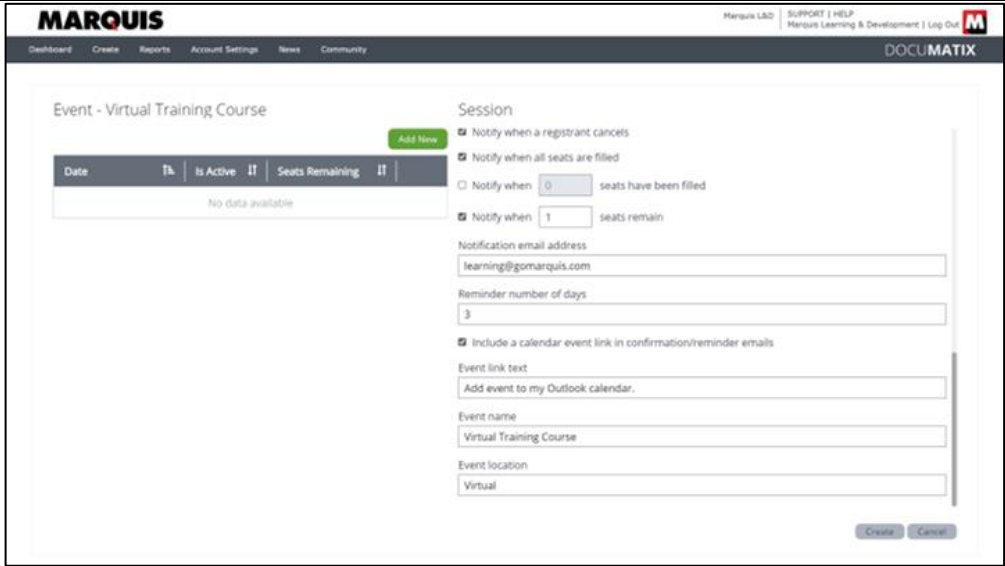
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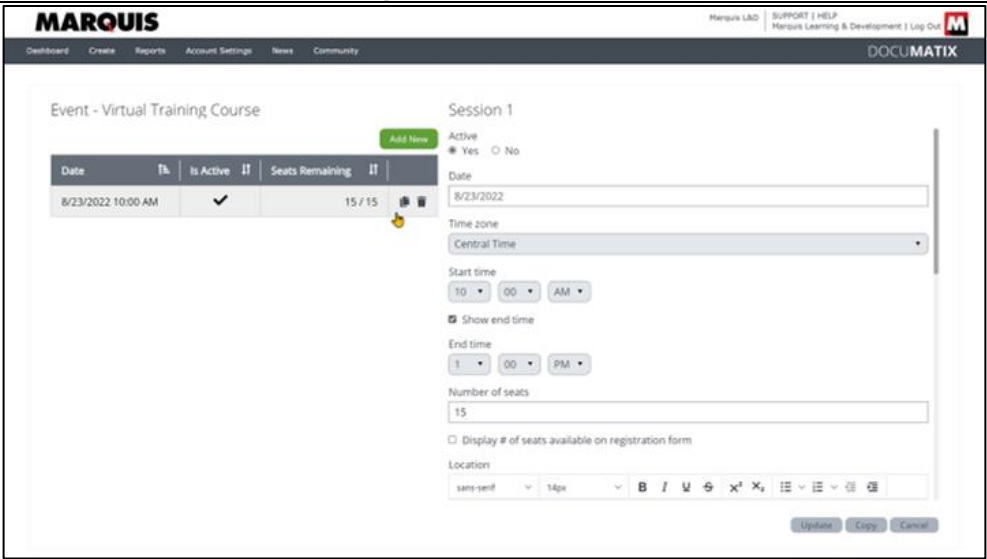
	
Step 12	Click Continue
Step 13	Complete the Confirmation page
13.1	Enter the Subject for the confirmation email
13.2	Verify the Email confirmation from name and update, if needed
13.3	Verify the Reply email address and update, if needed
13.4	Verify and update the HTML body fields (optional), if desired
Note: If there are any merge fields within the HTML Body or Text body that are not desired, please delete them out of the text box.	
13.5	Update the text within the Confirmation link text box, if desired
13.6	Update the text within the Cancellation link text box, if desired
	
Step 14	Click Continue
Step 15	Make any desired changes on the Settings page
	<ul style="list-style-type: none"> • Show logo
	<ul style="list-style-type: none"> • Choose Logo: Select a different logo than the default

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	<ul style="list-style-type: none"> • Logo alt text • Logo alignment • Button alignment • Button background color • Button text color • Event color options • Event form details header (optional) • Registration information header (optional) • Sessions to attend header (optional) • Additional questions header (optional) • Session name (optional) • Hide session name • Hide session numbering • Save my current settings as default values
Step 16	To reset the settings back to default, click the Restore My Default Settings button
Step 17	Click Finish
	
Step 18	A Confirmation message will appear to create a session for the event. Click Yes if you wish to create a session
Note: A session must be added to an event in order for it to be Published.	
Step 19	Click the Add New button to create a new session
Step 20	Update the Session settings
20.1	Click in the Date box and enter in a date or select one within the Calendar box
20.2	Use the drop-down arrow to select the Time zone
20.3	Use the drop-down arrows to select a Start Time
20.4	Enable/disable Show end time
20.5	If enabled, use the drop-down arrows to select an End Time
20.6	Enter a value for Number of seats
20.7	Enable/disable Display # of seats available on registration form
20.8	Enter the Location for the session

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20.9	Enable the desired Notification options
20.10	Enter in a Notification email address
20.11	Enable/disable the Calendar link options:
	<ul style="list-style-type: none"> • Edit the Event link text, if desired • Edit the Event name, if desired • Edit the Event location, if desired
Step 21	Click Create once complete
	
Step 22	To add more sessions, click the Add New button and repeat the previous steps
Step 23	To edit a session, click on it within the list and make the desired changes
23.1	Click Update to retain any changes
Step 24	To copy a session, click on a session within the list
24.1	Click the Copy button
24.2	Make the desired changes and click Create
Step 25	To delete a session, hover the mouse over a session and click the Delete icon

25.1	Click Yes to the confirmation message
	
Step 26	Once the sessions have been added, the Event can be published
Step 27	Click the Options icon on the Event within Drafts
Step 28	Click Publish
28.1	Click Yes to the confirmation message
	