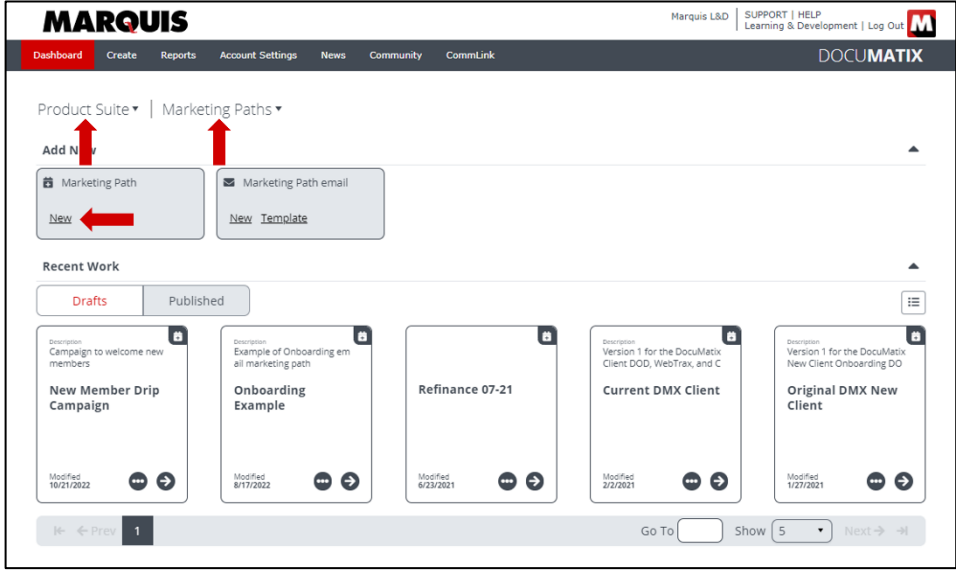
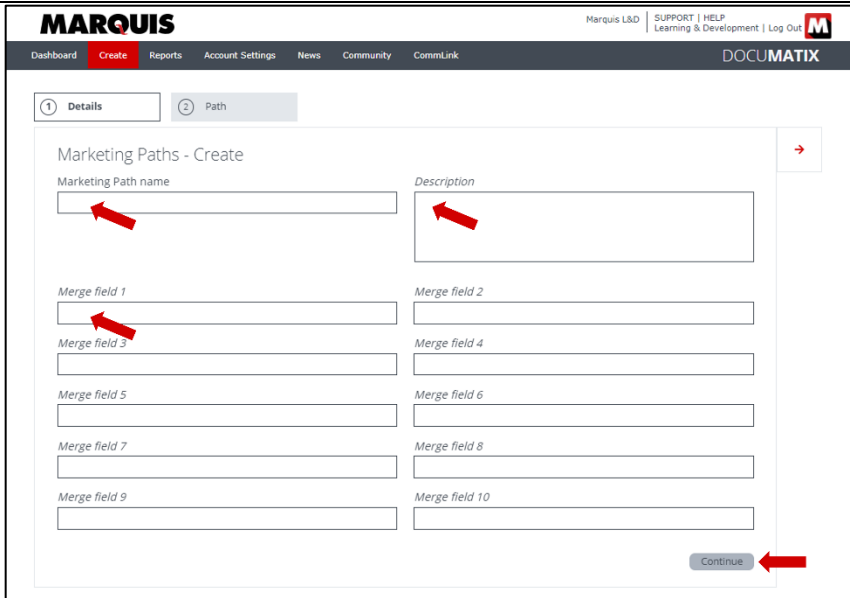

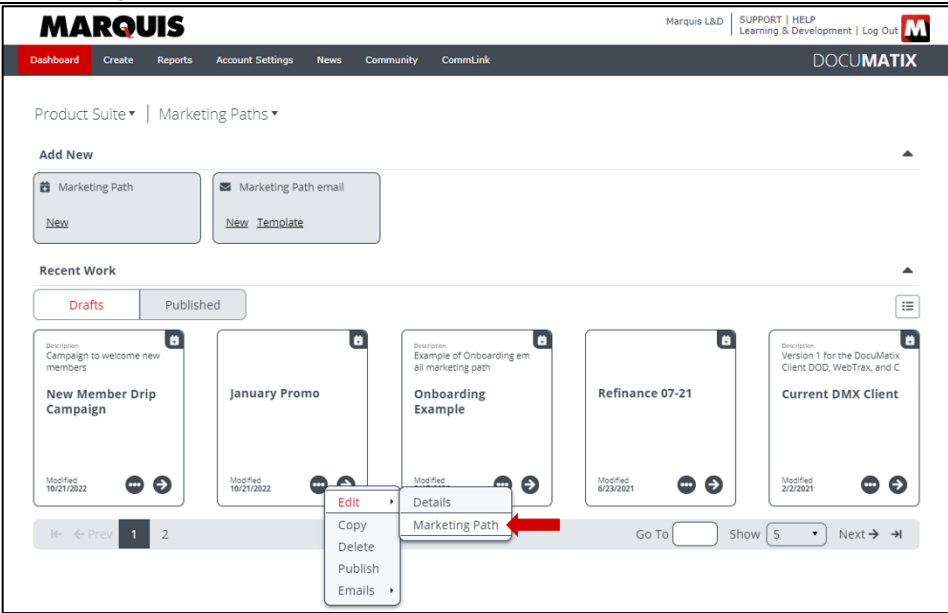
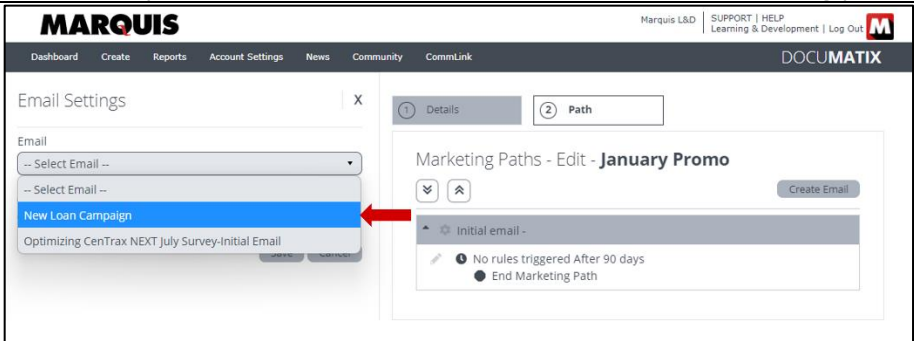

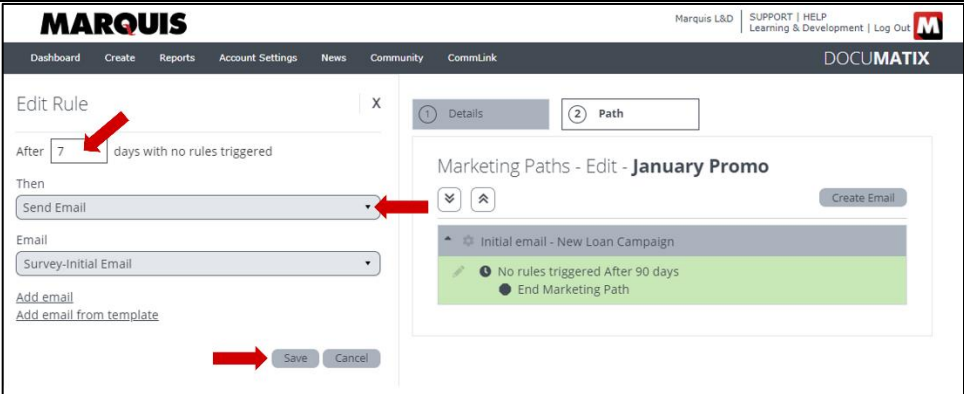


# MARQUIS

<b>DMX324</b>	<b>Build a Marketing Path</b>
	Use this step-by-step process to create a new Marketing Path.
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>DocuMatix</b>
<b>Step 2</b>	Select the <b>Product Suite</b> product and the <b>Marketing Paths</b> module
<b>Step 3</b>	Under the <b>Add New</b> section, click <b>New</b> on the <b>Marketing Path</b> card
	 <p>The screenshot shows the MARQUIS DocuMatix dashboard. At the top, there's a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', 'Community', and 'CommLink'. Below this, there's a 'Product Suite' dropdown menu and a 'Marketing Paths' dropdown menu. Under 'Marketing Paths', there's an 'Add New' dropdown menu. Below this, there are two cards: 'Marketing Path' and 'Marketing Path email'. The 'Marketing Path' card has a 'New' button. Red arrows point to the 'Add New' dropdown, the 'Marketing Path' card, and the 'New' button on the 'Marketing Path' card. Below the cards, there's a 'Recent Work' section with tabs for 'Drafts' and 'Published'. The 'Drafts' tab is active, showing a list of marketing paths: 'New Member Drip Campaign', 'Onboarding Example', 'Refinance 07-21', 'Current DMX Client', and 'Original DMX New Client'. Each card has a description, a modified date, and a 'Go To' button. At the bottom, there's a pagination bar with 'Go To', 'Show', and 'Next' buttons.</p>
<b>Step 4</b>	Define the following items under <b>Details</b> for the specific marketing path
	<b>Note:</b> Anything in <i>italics</i> is an optional field as noted below. Some of the fields will auto populate from Account Settings.
	<ul style="list-style-type: none"> <li>Marketing Path name</li> </ul>
	<ul style="list-style-type: none"> <li>Description (optional)</li> </ul>
	<ul style="list-style-type: none"> <li>Merge Fields – There are 10 merge fields available to be defined. These will be all merge fields applied to all emails in the path</li> </ul>

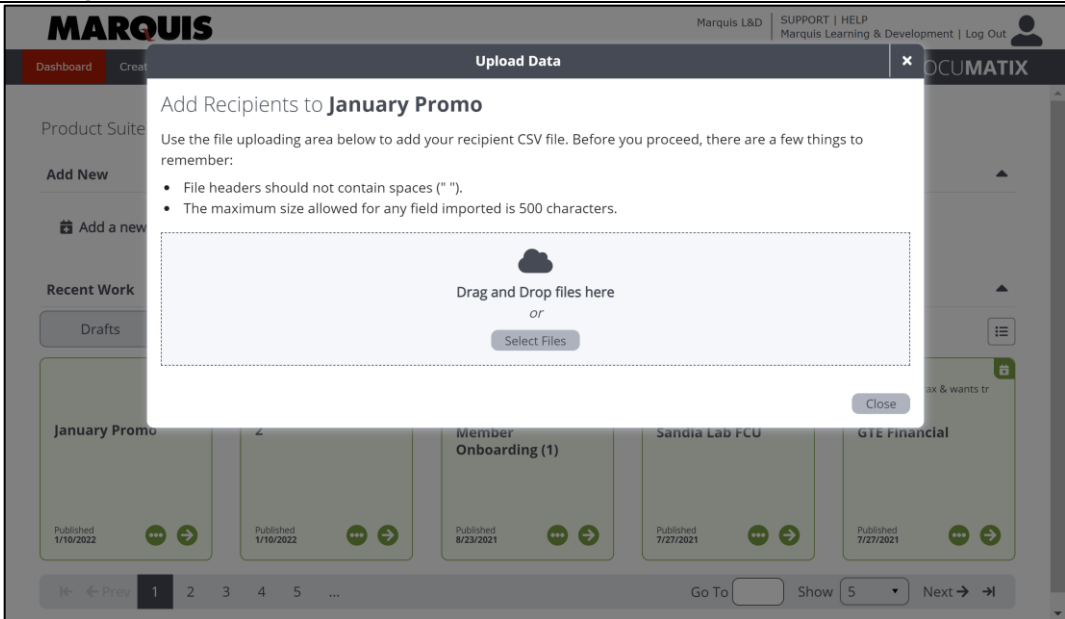
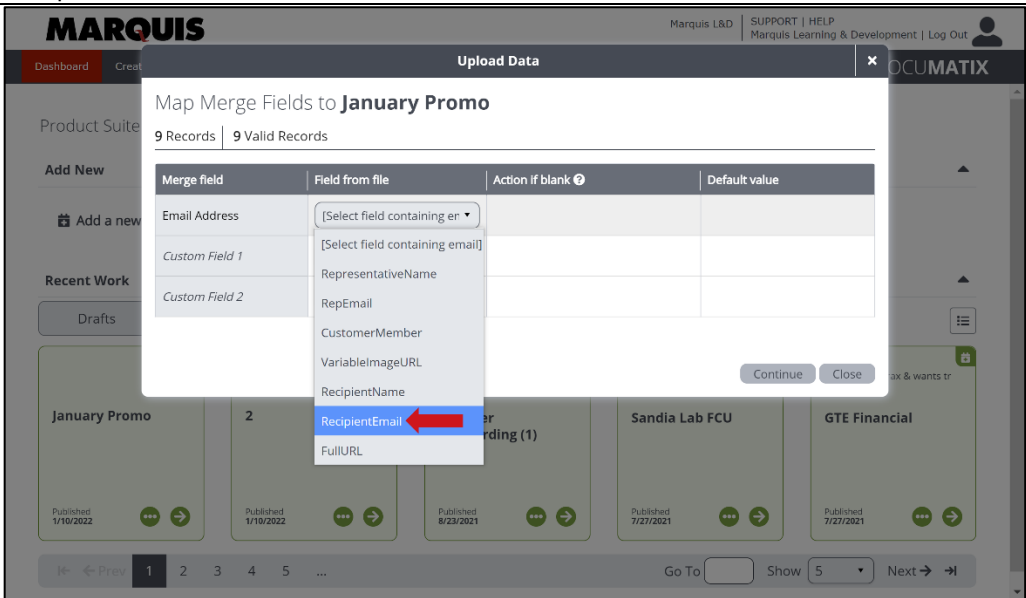
<b>Step 5</b>	Click <b>Continue</b> to continue to the Path section
	
<b>Step 6</b>	Click <b>Create Email</b> . If you have already built your Marketing Path Emails, skip to Step 7.
<b>Note:</b> From here, follow the steps to build the Marketing Path Emails. Refer to the <b>Creating an Email for Marketing Path (from Scratch; from a Template; or from a Layout)</b> document for step-by-step procedures.	
<b>Step 7</b>	Click <b>Dashboard</b> from the main menu
<b>Step 8</b>	Click the <b>Options</b> icon  on the card of the marketing path
8.1	Hover over <b>Edit</b>
8.2	Click <b>Marketing Path</b>
	
<b>Step 9</b>	Click gray bar where it says <b>Initial email</b>
9.1	Click <b>Select Email</b>

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<b>Step 10</b>	Click the <b>Email</b> dropdown menu and select the first email of the marketing path
	
<b>Step 11</b>	Click <b>Save</b>
<b>Step 12</b>	Click the pencil icon  to the left of <b>No rules triggered After 90 days</b> to get to the Rule settings
<b>Step 13</b>	Type the number of <b>days</b>
<b>Step 14</b>	Choose the Action:
	<ul style="list-style-type: none"> <li>• <b>End Marketing Path:</b> the path will end after that time frame.</li> <li>• <b>Send Email:</b> select another email to be sent</li> <li>• <b>Trigger New Marketing Path:</b> select another Marketing Path from which to move the email recipient.</li> </ul>
<b>Step 15</b>	Click <b>Save</b> once all selections are made
	
<b>Note:</b> If subsequent emails need to be built, click the <b>Add email</b> or <b>Add email from template</b> links in the bottom left.	

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<b>Step 16</b>	Repeat steps 12-15 for each email within the path until the path is complete. The last email campaign should have an action of <b>End Marketing Path</b> .
<b>Step 17</b>	Click <b>Dashboard</b> on the main menu
<b>Step 18</b>	Click the <b>Options</b> icon  on the card of the marketing path.
<b>Step 19</b>	Click <b>Publish</b>
19.1	Click <b>Validate</b> for each email
19.2	Click <b>Next</b>
<b>Note:</b> If any errors are found in the emails, a message will pop up alerting to what needs to be updated or corrected before the Marketing Path can be published. Navigate to <b>Dashboard</b> to edit the email and make the necessary changes. Please refer to the <b>Creating an Email for Marketing Path (from Scratch; from a Template; or from a Layout)</b> document for step-by-step procedures.	
<b>Step 20</b>	If no errors are found, click <b>Next</b>
<b>Step 21</b>	Enter a <b>Notification Email Address</b>
<b>Step 22</b>	Click <b>Publish</b>
<b>Step 23</b>	Upload the CSV file of email recipients
23.1	Click the <b>Options</b> icon  on the card in the <b>Published</b> tab
23.2	Click <b>Upload</b>
<b>Note:</b> 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.	

23.3	Drag and Drop the file into the box or click <b>Select Files</b> to browse and select the desired file
	
<b>Step 24</b>	Complete the <b>Map Merge Fields</b> page
<b>Note:</b> Mapping is the process of aligning the merge fields created within DocuMATIX to the header fields contained in the CSV file.	
24.1	Using the drop-down arrow, select the <b>Email Address</b> from the list
	
24.2	Use the drop-down arrow to select the appropriate field for each required merge field
24.3	Use the drop-down arrow to select the desired Action if blank:
	<ul style="list-style-type: none"> <li>• <b>Use default value:</b> The default value entered will be used in place of a custom value</li> <li>• <b>Reject record:</b> The email will not be sent to that recipient</li> <li>• <b>Remove merge field from the email:</b> The merge field will be removed from the email</li> </ul>
24.4	If “Use Default Value” action is selected, enter the desired text into the <b>Default value</b> field
24.5	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.

24.6 Click **Continue**

Merge field	Field from file	Action if blank ?	Default value
Email Address	RecipientEmail		
Name	RecipientName	Use default value	
Custom Field 1	RepresentativeName	Use default value	
Custom Field 2	[Do not use custom field]	Remove merge field from email	

**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.

Records to be Imported	
From CSV Files	
Total	


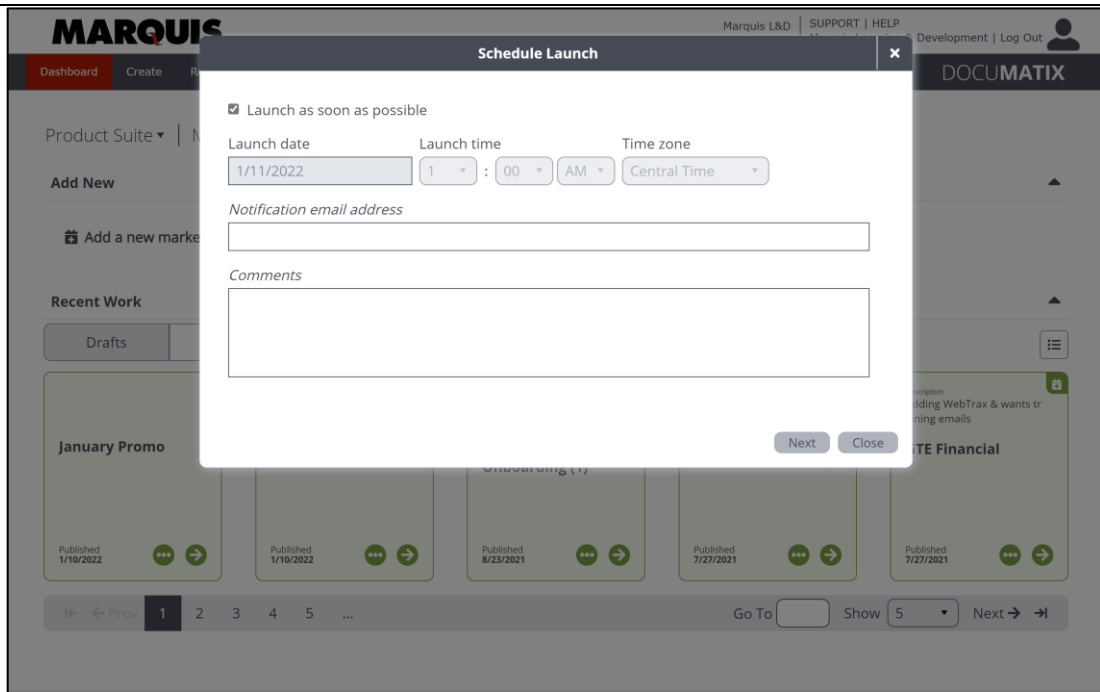
File Validation Complete.

File: DMX mock source file\_e\_2.csv

Valid Records: 7

Corrupt Records: 2

# MARQUIS

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