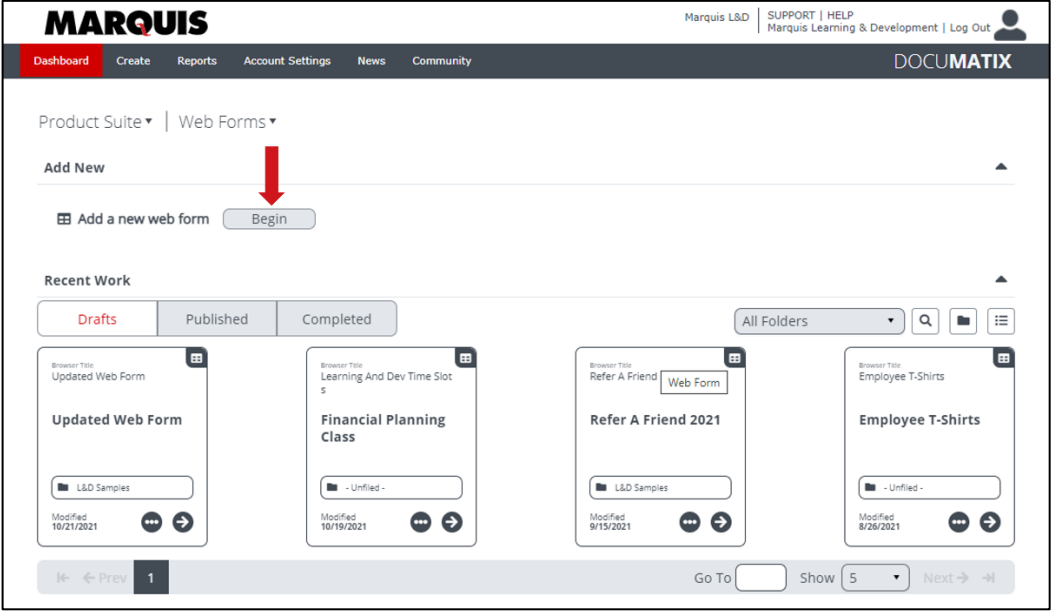
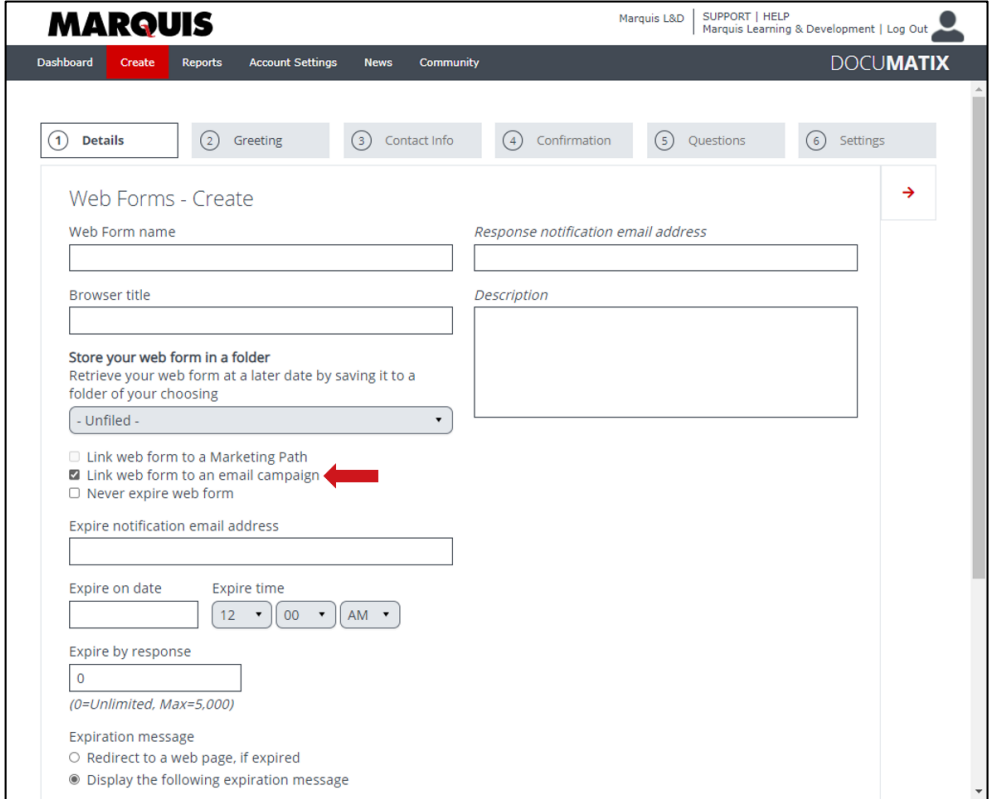


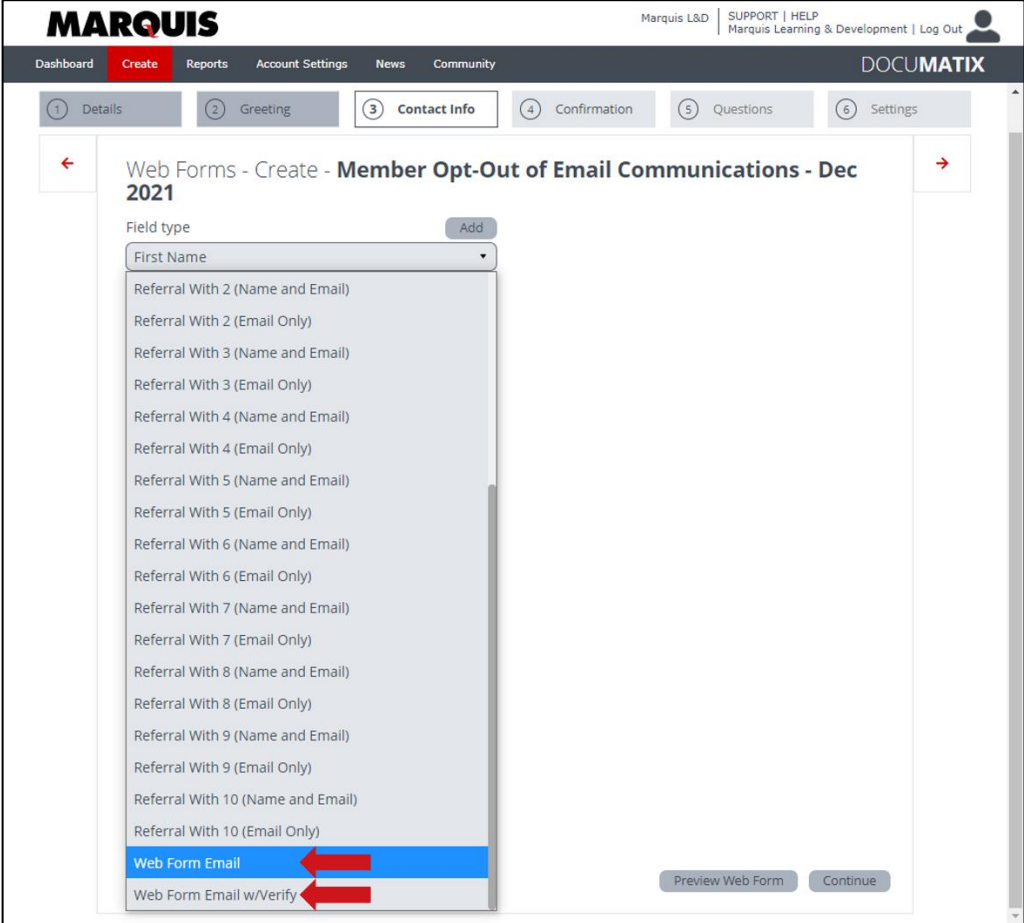
MARQUIS

DMX315	Web Form Emails with Document Rack PDF
	This document provides steps for creating a triggered response email, which contains a document link from the document rack, after the completion of a web form. All necessary documents must be added to the Document Rack in order to attach it to the email. Refer to the DMX335 procedures for uploading a PDF document to the Document Rack.
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Web Forms module
Step 3	Click Begin
	 <p>The screenshot shows the Marquis DocuMatix web interface. At the top, there is a navigation bar with 'MARQUIS' on the left and 'SUPPORT HELP Marquis Learning & Development Log Out' on the right. Below this is a secondary navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. The main content area has 'Product Suite' and 'Web Forms' dropdown menus. Under 'Add New', there is a 'Begin' button highlighted with a red arrow. Below this is a 'Recent Work' section with tabs for 'Drafts', 'Published', and 'Completed'. It displays four cards for different web forms: 'Updated Web Form', 'Financial Planning Class', 'Refer A Friend 2021', and 'Employee T-Shirts'. Each card shows a 'Web Form' label, a document rack icon, and a 'Modified' date.</p>

MARQUIS

Step 4	Fill out the required details for the Web Form
4.1	Enter a Web Form Name
4.2	Modify the Browser title , if desired
4.3	Enter a Response Notification Email Address , if desired
4.4	Enter a Description , if desired
4.5	Click the drop-down arrow to Store your web form in a folder , if desired
4.6	Place a checkmark in the box for Link web form to an email campaign
	
Step 5	Enter in the Expire notification email address
Step 6	Choose expiration criteria
6.1	Choose from calendar or enter a specific date and time for the web form to expire, and/or
6.2	Enter the number of web form responses needed to cause the web form to expire
Step 7	Choose expiration message by selecting the applicable radio dial
7.1	Redirect to a chosen web page -or-
7.2	Enter an expiration message
Step 8	Once complete, click Continue
Step 9	On the Greeting tab, select the desired Greeting type from the drop-down menu
9.1	Fill out the required information
9.2	Click Continue
9.3	Optionally, select an Analytics Type for gathering recipient data
	<ul style="list-style-type: none"> • Google Analytics • Custom Javascript • Custom HTML

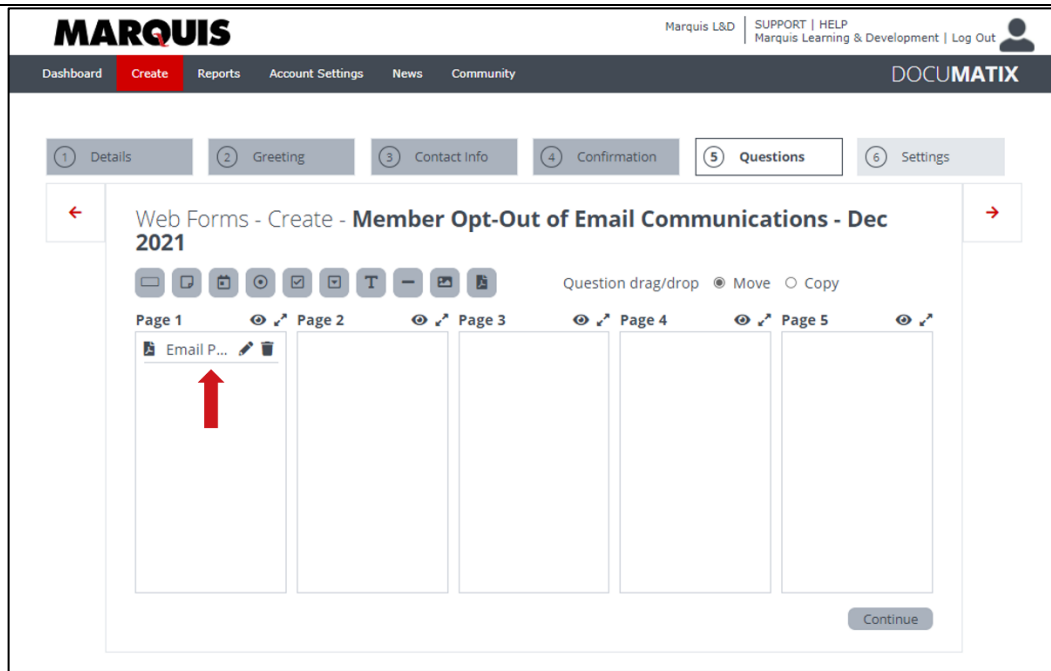
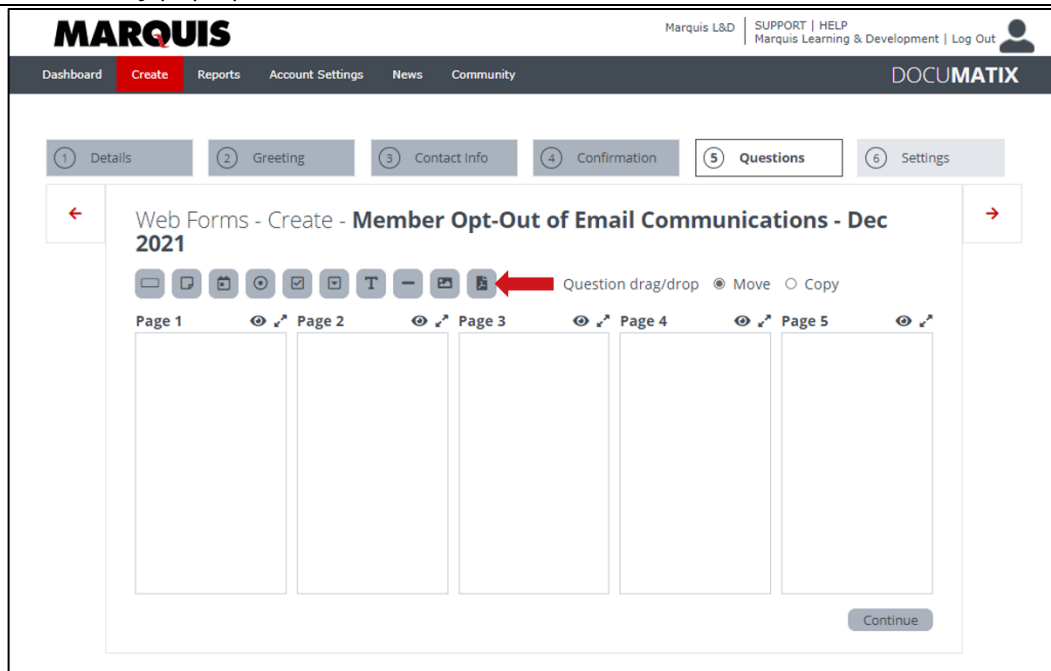
MARQUIS

Step 10	On the Contact Info tab, from the field type drop-down menu, select Web Form Email or Web Form Email w/Verify
<p>Note: The Web Form Email or Web Form Email w/Verify are required in order for an email to be sent when an individual fills out the web form. If these fields are not showing in the list, return to the Details page to place a check in the Link Web Form to an email campaign box.</p>	
Step 11	Click Add
	 <p>The screenshot shows the Marquis web form creation interface. The 'Contact Info' tab is selected. A dropdown menu for 'Field type' is open, showing various options. 'Web Form Email' and 'Web Form Email w/Verify' are highlighted in blue, with red arrows pointing to them. The 'Add' button is visible at the top right of the dropdown menu.</p>
Step 12	To add additional field types, click on the desired field within the drop-down menu
12.1	Click the Add button
12.2	Repeat this process until all desired contact fields have been added
Step 13	Click Continue
Step 14	Add the desired Confirmation information. Click Continue
Step 15	Click Continue

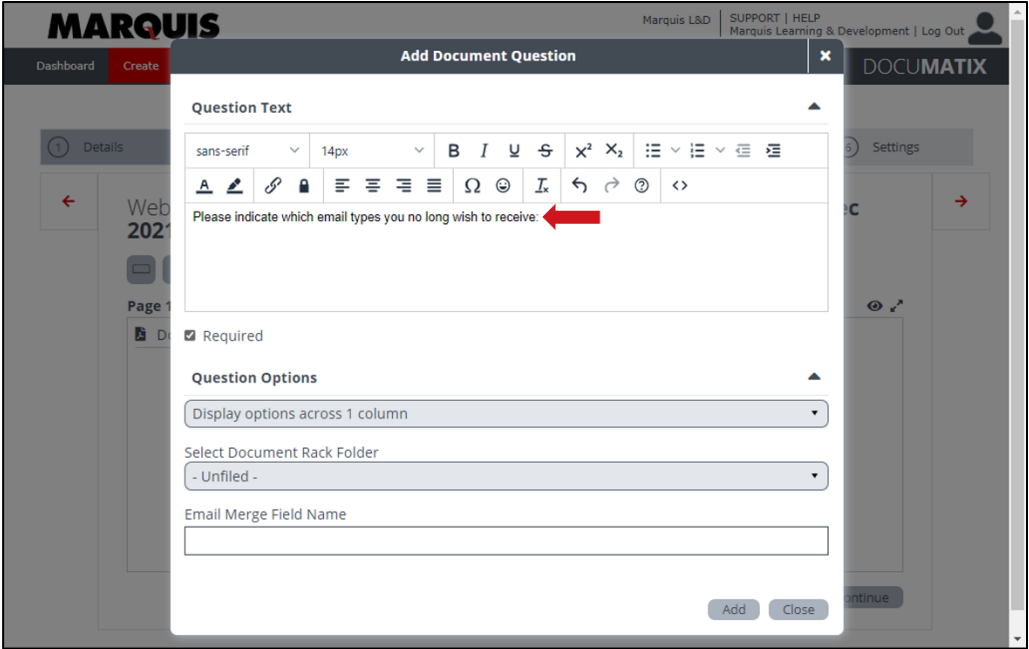
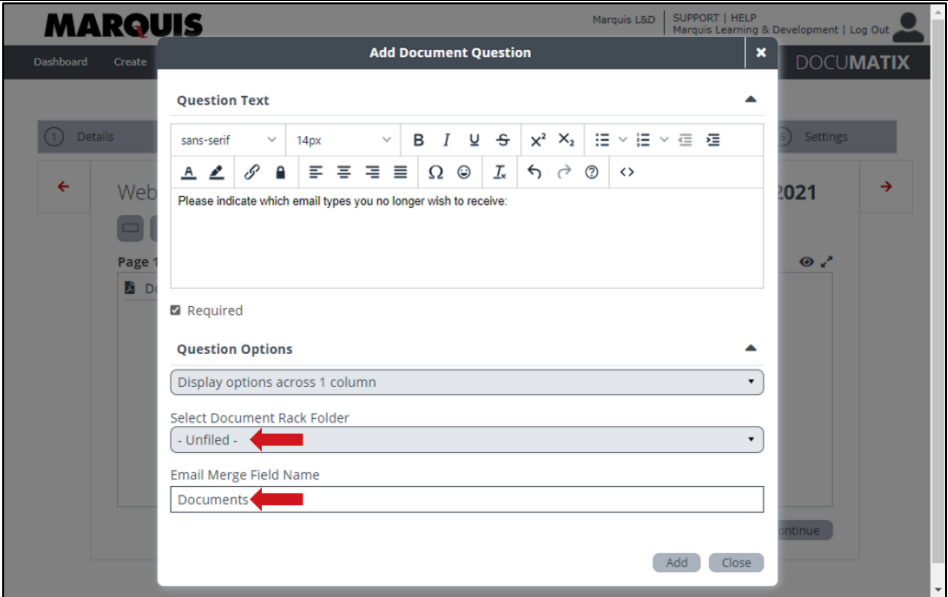
MARQUIS

Step 16

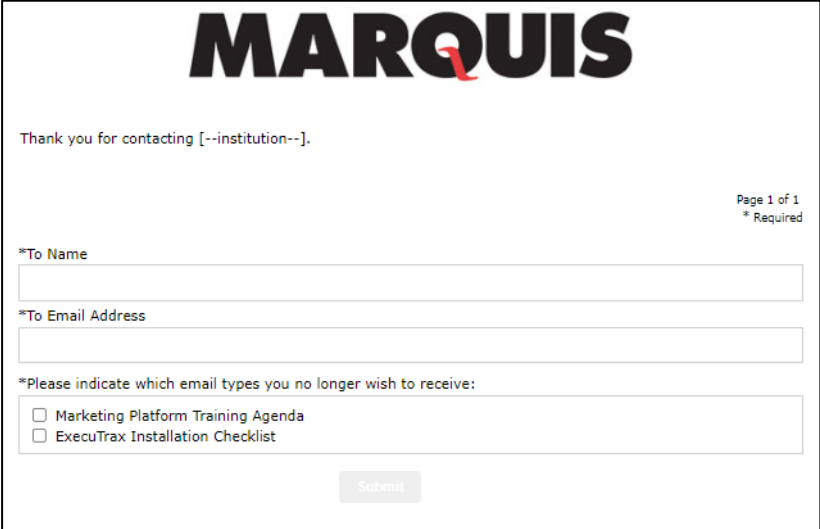

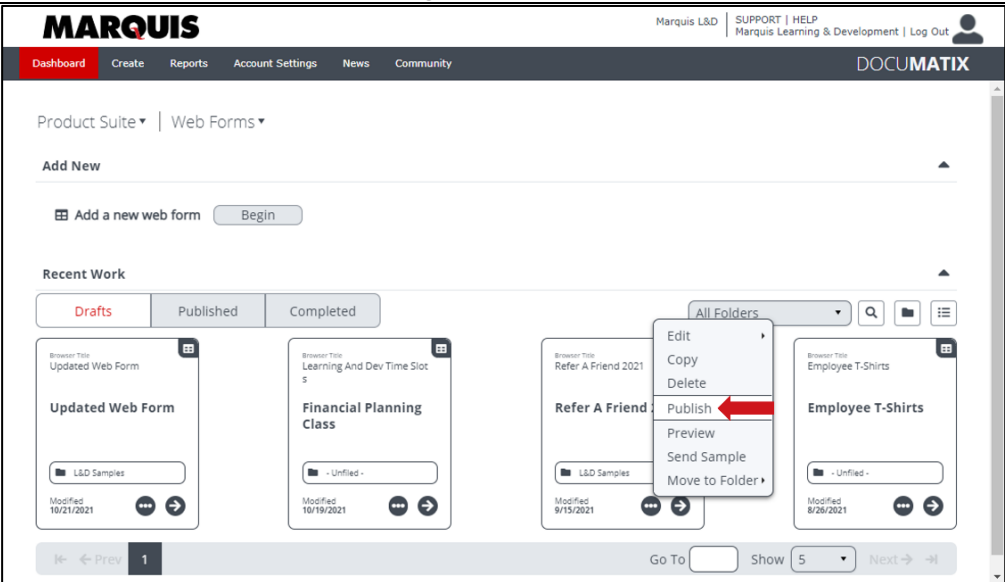
In order to complete the web form **Questions** tab, "Click, Drag, and Drop" the document icon to the desired location on the page. The document cell editor window will automatically pop up.



MARQUIS

Step 17	First, type in the desired question related to the document
17.1	If the Document is required, place a check mark in the Required box.
Note: All fields marked as Required can be placed into the web form email as a merge field. The Email Merge Field Name will be displayed when selecting merge fields to place in the email.	
17.2	Select the desired display option for the document within the drop-down list
17.3	Select the desired Document Rack folder which contains the documents being made available within the web form.
17.4	Designate the Email Merge Field Name
	
17.5	Once the question setup is complete, click the Add button
	
Step 18	Optionally, preview the web form

MARQUIS

Step 19	Click Continue <div data-bbox="483 233 1297 758" data-label="Form"></div> <p data-bbox="699 800 1078 831" style="text-align: center;">Completed Web Form Example</p>
Step 20	If desired, make to Settings
Step 21	Click Finish
Step 22	Click Dashboard from the main menu
Step 23	To Publish your Web Form, click the Options icon  on the web form
Step 24	Click Yes on the Confirmation Message <div data-bbox="391 1104 1390 1682" data-label="Complex-Block"></div>

MARQUIS

Note: If desired, the web form can be added to the website by using the link provided by DocuMatix.

Web Form Link

Using a Link | Using an iFrame


Support multiple entries

(Copy/paste into your website where you would like your link to appear.)

Generate Short URL

QR code for link:
(To save the QR Code, right click on the image and select save picture as or save image as.)

Small

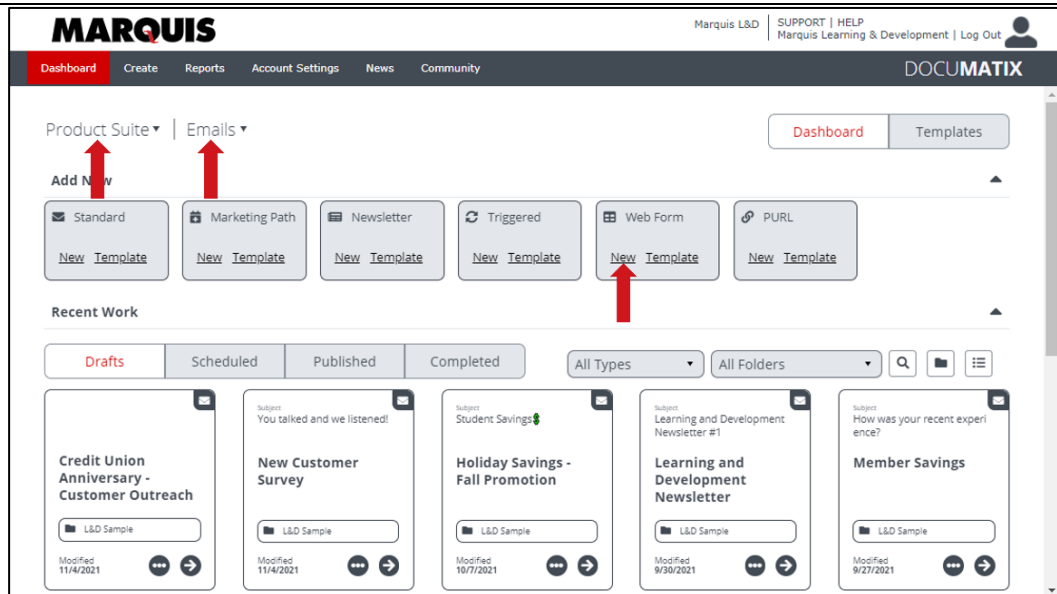


Create Push Report | Close

Step 25 Once the web form is built with a document rack folder selected, build an email in response to the web form

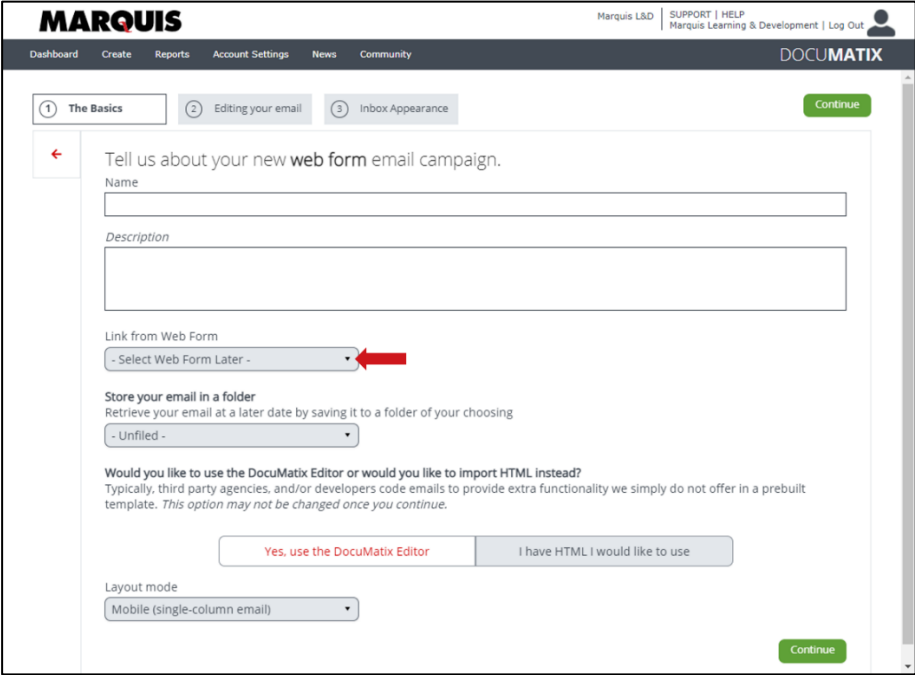

Step 26 Click the Module drop-down arrow and select Emails

Step 27 Click **New** or **Template** within the Web Form card to begin creating your web form email


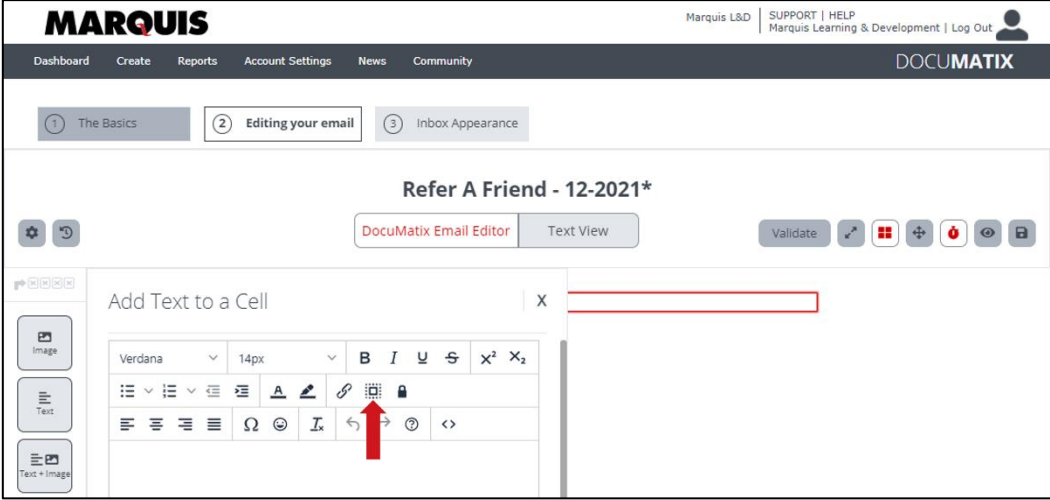

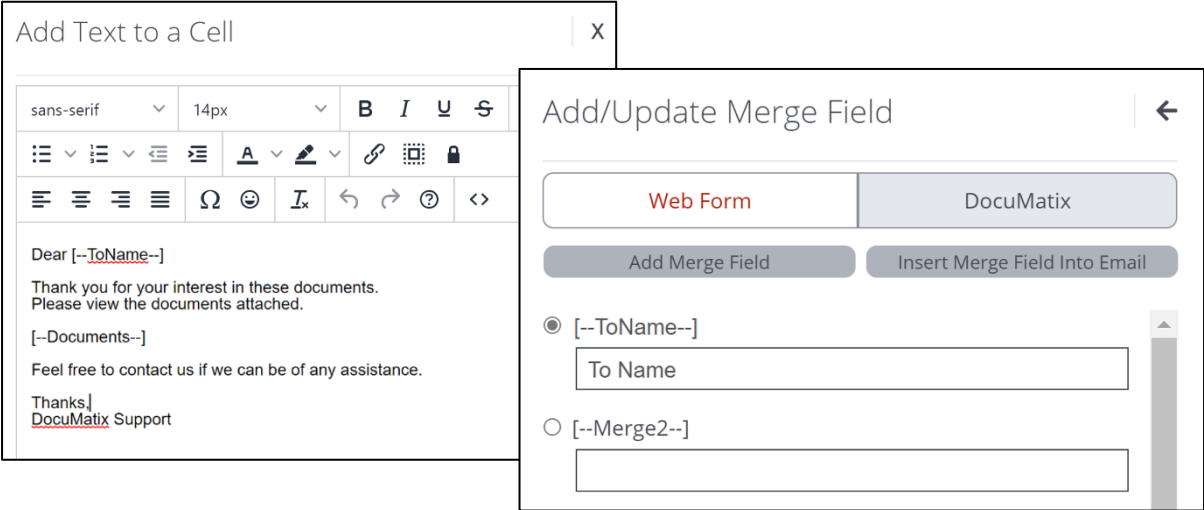



The screenshot shows the Marquis DocuMatix dashboard. At the top, there is a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', and 'Community'. Below this is a 'Product Suite' dropdown menu with 'Emails' selected. A 'Dashboard' button is visible. Under 'Add New', there are several cards: 'Standard', 'Marketing Path', 'Newsletter', 'Triggered', 'Web Form', and 'PURL'. Each card has a 'New Template' button. A red arrow points to the 'Web Form' card. Below this is a 'Recent Work' section with tabs for 'Drafts', 'Scheduled', 'Published', and 'Completed'. There are also filters for 'All Types' and 'All Folders'. The 'Recent Work' section displays five email templates: 'Credit Union Anniversary - Customer Outreach', 'New Customer Survey', 'Holiday Savings - Fall Promotion', 'Learning and Development Newsletter', and 'Member Savings'. Each template card shows a subject line, a preview, an 'L&D Sample' button, and a 'Modified' date.

MARQUIS

Step 28	Link the email to the web form by selecting the published web form name from the Link From Web Form drop-down menu
Step 29	Complete the remaining fields within the Basics page and click Continue to advance to the Editing your email 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"> Would you like to use the DocuMatix Editor or would you like to import HTML instead? <ul style="list-style-type: none"> Yes, use the DocuMatix Editor – create email within the DocuMatix tool I have HTML I would like to use – load HTML code from outside source
	<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 30	Select the desired email element, “Click, Drag, and Drop” the corresponding icon into the body of the email being created
Step 31	To insert a merge field, hover over the desired text cell and click the edit icon 

MARQUIS

<p>Step 32</p>	<p>Click the Merge Field icon  icon</p>
	
<p>Note: Merge fields that were defined during the web form creation step will now be available to use within the email.</p>	
<p>Step 33</p>	<p>In the edit cell, place your cursor where you want to insert the merge field and click on the  icon</p>
<p>Step 34</p>	<p>Under the Web Form tab, click the radio button next to the desired merge field to insert, then click the Insert Merge field button</p>
	
<p>Step 35</p>	<p>Complete the email design</p>
<p>Step 36</p>	<p>To publish the email, click the Dashboard tab</p>
<p>Step 37</p>	<p>From the email list, click Options icon  of the desired email to publish, and click Publish from the menu</p>

MARQUIS

Note: Below are examples of a web form and a web form response email with a link to a document within a Document Rack.

Sample Web Form

MARQUIS

Thank you for contacting [--institution--].

Page 1 of 1
* Required

*To Name

*To Email Address

*Please indicate which email types you no longer wish to receive:

Marketing Platform Training Agenda
 ExecuTrax Installation Checklist

Sample Web Form Email

Dear [--ToName--]

Thank you for your interest in these documents.
Please view the documents attached.

[DMXDP Training Document](#)
[Marquis Training Information](#)

Feel free to contact us if we can be of any assistance.

Thanks,
DocuMatix Support