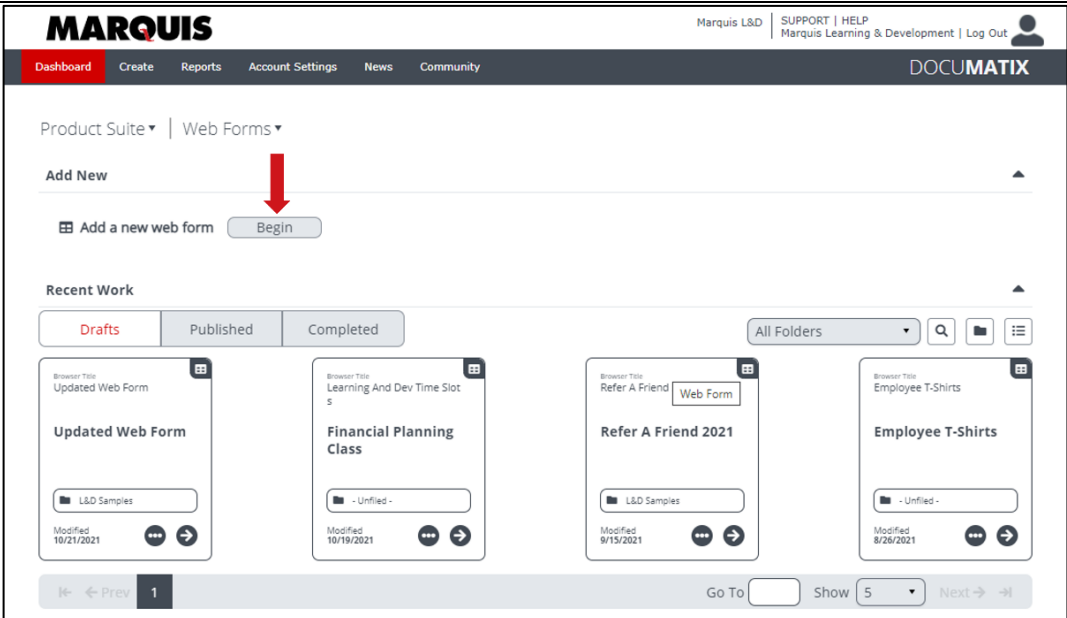
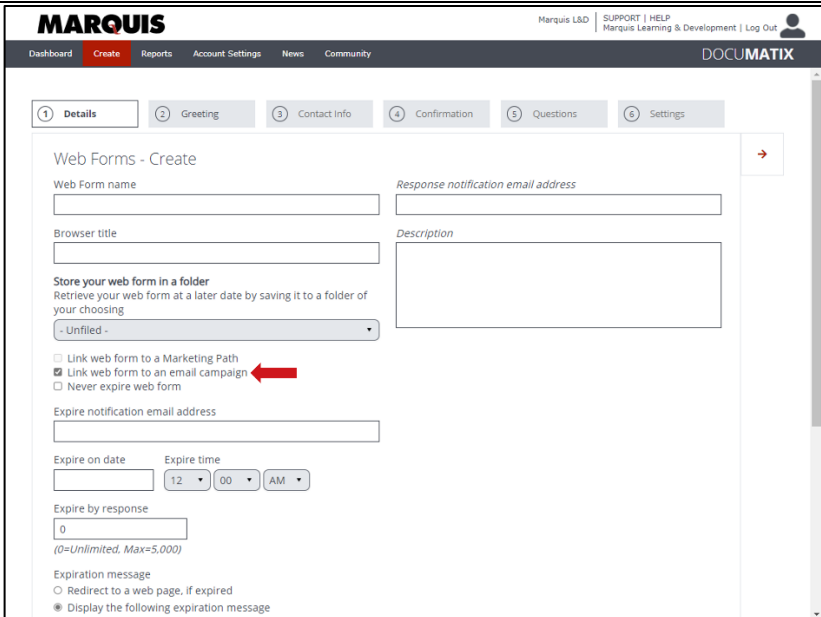
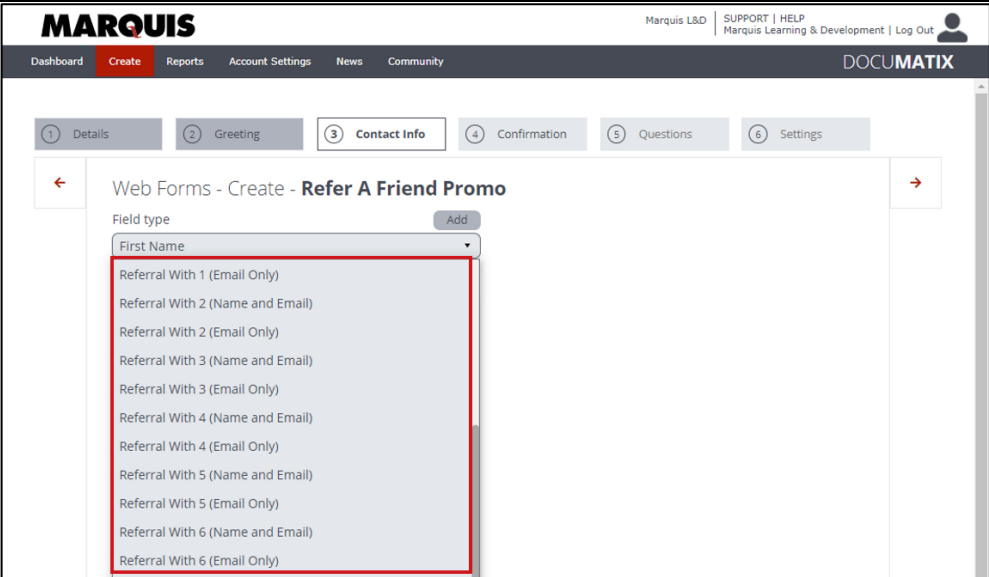
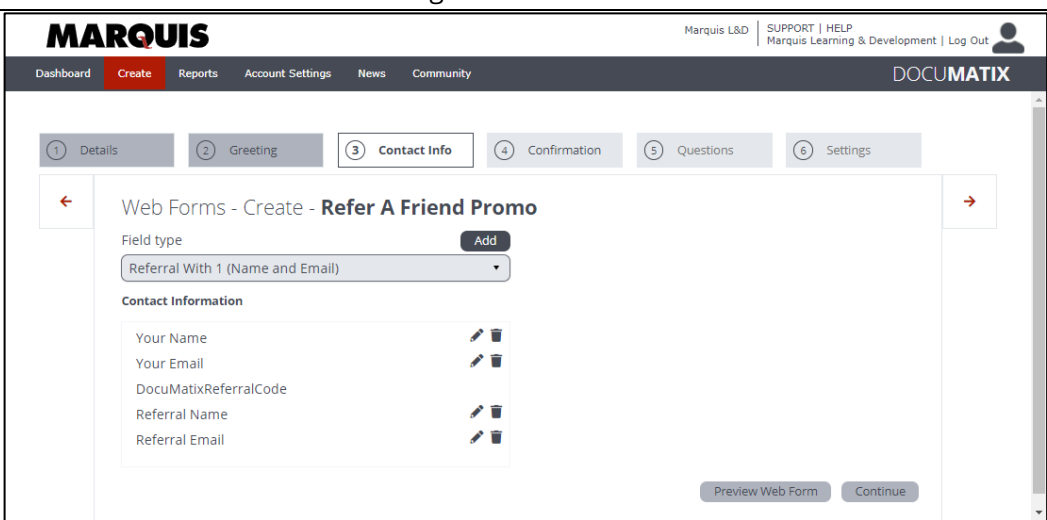


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DMX316	How to Set up Refer-a-Friend
	Here you will learn the process of building a Refer-a-Friend web form and creating a triggered response email from the completion of the web form.
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Web Forms module
Step 3	To create a web form, click Begin
	 <p>The screenshot shows the Marquis DocuMatix dashboard. At the top, there are navigation tabs: Dashboard, Create, Reports, Account Settings, News, and Community. Below this, there are dropdown menus for 'Product Suite' and 'Web Forms'. Under 'Web Forms', there is an 'Add New' section with a button labeled 'Add a new web form' and a 'Begin' button. A red arrow points to the 'Begin' button. Below this is a 'Recent Work' section with tabs for 'Drafts', 'Published', and 'Completed'. There are four cards representing recent work items: 'Updated Web Form', 'Financial Planning Class', 'Refer A Friend 2021', and 'Employee T-Shirts'. Each card shows a browser title, a folder name, and a modification date.</p>
Step 4	Fill out the information within the Details tab, ensuring that the checkbox is selected for Link web form to an email campaign . Click Continue
	 <p>The screenshot shows the 'Web Forms - Create' form in the 'Details' tab. The form has several fields: 'Web Form name', 'Response notification email address', 'Browser title', and 'Description'. Below these is a section 'Store your web form in a folder' with a dropdown menu set to '- Unfiled -'. There are three checkboxes: 'Link web form to a Marketing Path', 'Link web form to an email campaign' (which has a red arrow pointing to it), and 'Never expire web form'. Below the checkboxes are fields for 'Expire notification email address', 'Expire on date', 'Expire time' (set to 12:00 AM), and 'Expire by response' (set to 0). There is also an 'Expiration message' section with radio buttons for 'Redirect to a web page, if expired' and 'Display the following expiration message'.</p>
Step 5	Complete the Greeting tab. Click Continue

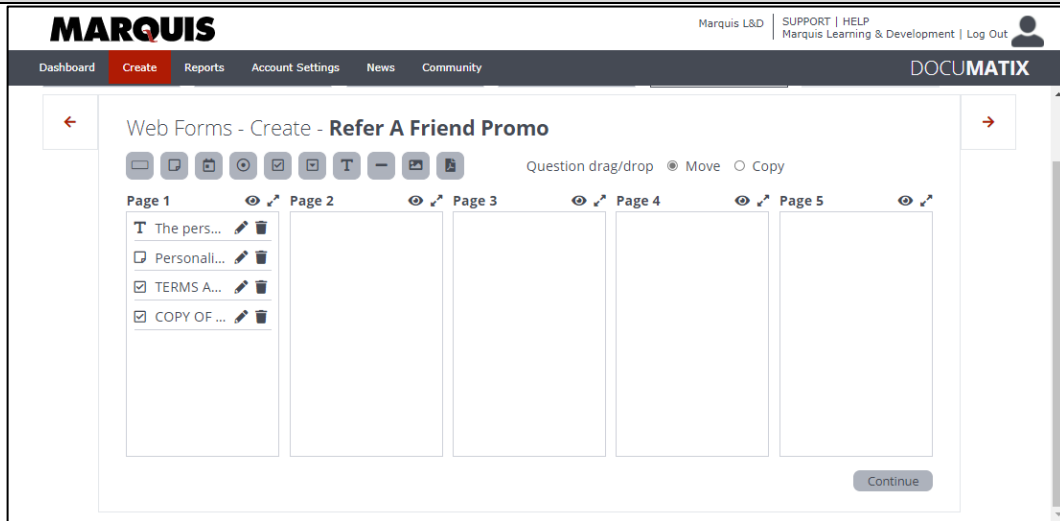
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Step 6	Within the Contact Info tab, click the drop-down arrow for the Field Type
Step 7	Select either Referral with... (Name & Email) or Referral with... (Email only)
Note: The template requires all the fields to appear on the Web Form. When using the template, deleting any one of the fields will result in a removal of all referral fields.	
	
Step 8	Click the Add button located to the right of the field name
	
Note: If you would like any additional contact information to be gathered, select and add the desired Field type from within the Field Type list. To change the order of the contact information fields within the web form, hover your mouse over the field type, drag and drop to the new desired position in the list.	
Step 9	Repeat steps 6-8 to add additional contact fields
Step 10	To rearrange the order of a field, click the field and drag it to the desired order within the list
Step 11	Click Preview Web Form at the bottom of the page
Step 12	Click Continue
Step 13	Complete the Confirmation tab
Step 14	Click Continue

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Note: Within the Questions tab, you'll find several pre-populated components within the Web Form editor. All questions may be customized/edited.

- Personal information
- Personalized message
- Terms and Conditions
- Copy of Referral Emails



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.

Step 15 Select the desired web form element, and “Click, Drag, and Drop” the corresponding icon into the desired page of the web form

-  Text
-  Memo
-  Date
-  Radio Button
-  Checkbox
-  Dropdown
-  Custom Text
-  Line
-  Image
-  Document


Step 16 Repeat Step 15 for each question

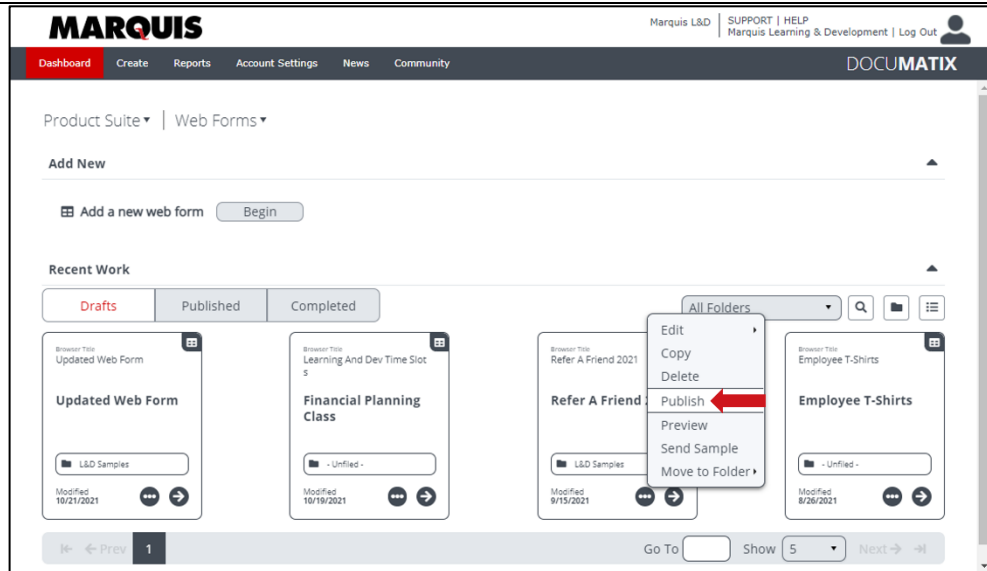
Step 17 If desired, click the **Preview Page** icon  for each page you build

Step 18 Once all pages are ready, click **Continue**

Step 19 Complete the **Settings** page

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Step 20	If desired, click Preview Web Form
Step 21	Click Finish
Step 22	Click Dashboard in the main menu
Step 23	To publish the web form, click the Options icon  on the web form card
Step 24	Click Publish
Step 25	Click Yes to the confirmation message



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.)

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



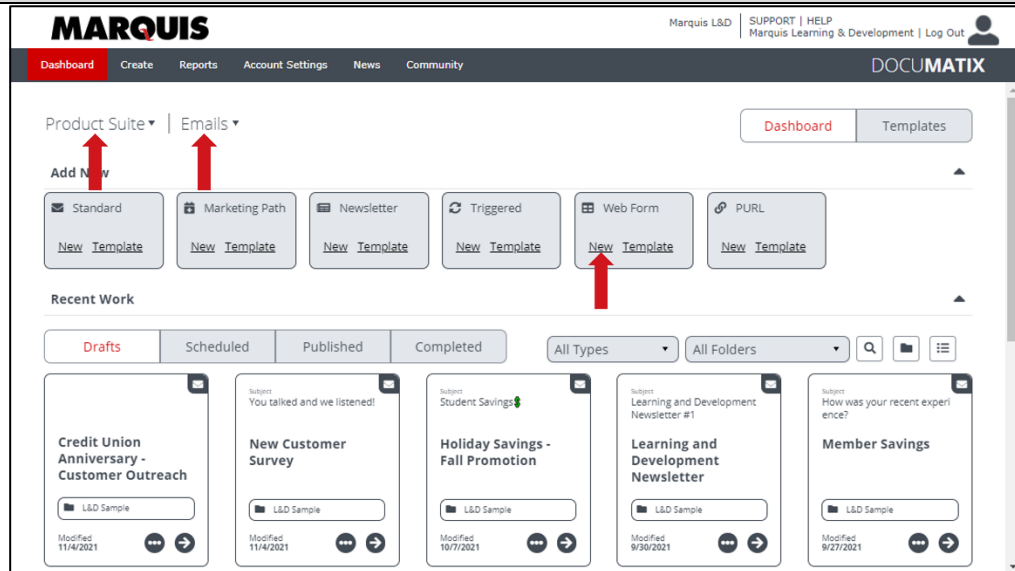
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Note: Once the web form is built with the desired referral information selected, you'll then need to build an email in response to the web form.

Step 26 Click the module drop-down arrow and select **Emails**

Step 27 Click **New** or **Template** on the Web Form card

Note: This email will be sent to the referred friend after the published Web Form is completed by the recipient.



Step 28 Link the Web Form email to the Refer-a-Friend 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.

- Name
- Description (optional)
- Store your email in a folder
- Would you like to use the DocuMatix Editor or would you like to import HTML instead?
 - 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
- Layout Mode

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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.


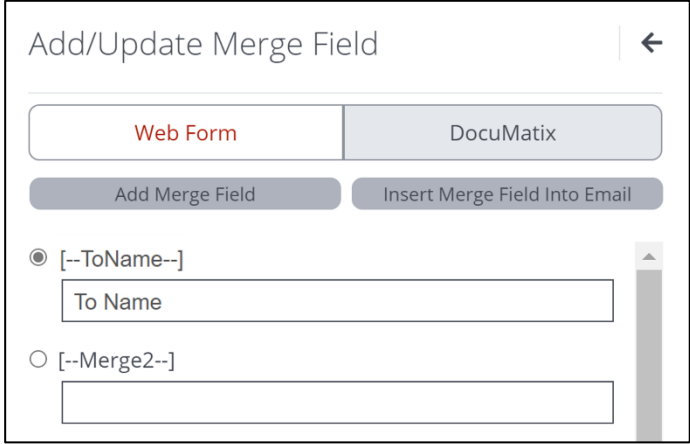

Step 30 Select the desired email element, “Click, Drag, and Drop” the corresponding icon into the body of the email being created

Step 31 To insert a merge field, hover over the desired text cell and click the edit icon 

Step 32 Click the Merge Field icon  icon

Note: Merge fields that were defined during the web form creation step will now be available to use within the email.

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Step 33	In the edit cell, place your cursor where you want to insert the merge field and click the  icon
Step 34	Under the Web Form tab, click the radio button next to the desired merge field to insert, then click the Insert Merge field button
	
Step 35	Now complete the email design and publish the web form email. To publish, click the Dashboard tab. From the email list, click the desired email to publish, and click Publish from the menu.
Step 36	Repeat steps 31-35 until all desired merge fields are in place
Step 37	Continue build of email content
Step 38	Publish the email when the build is complete
Step 39	Click Dashboard in the main menu
Step 40	Click the Options icon  located on the Refer A Friend email card
Step 41	Click Publish
Step 42	Click Yes to the confirmation message