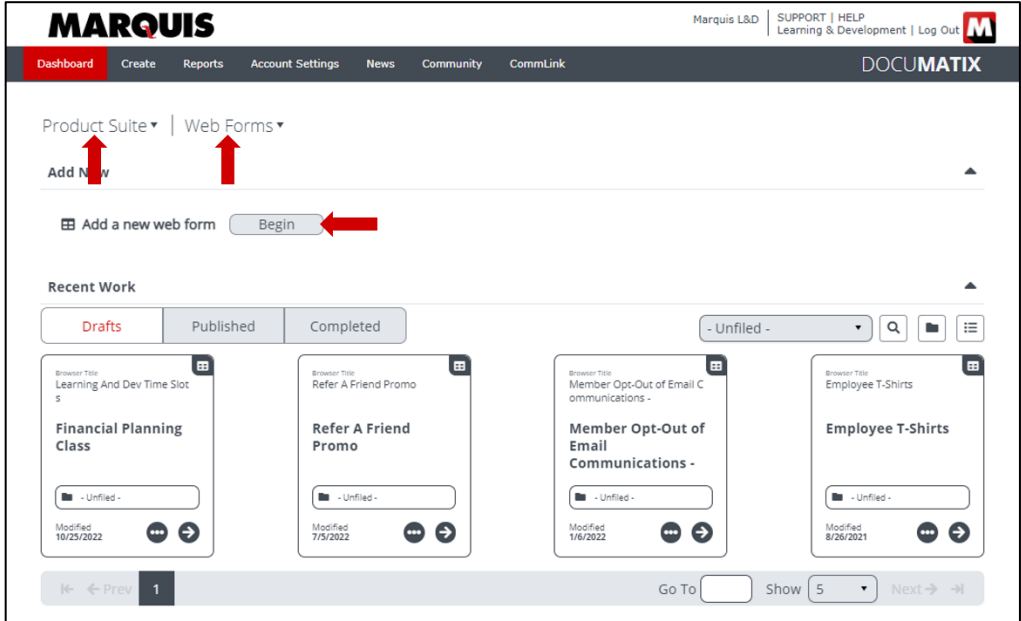
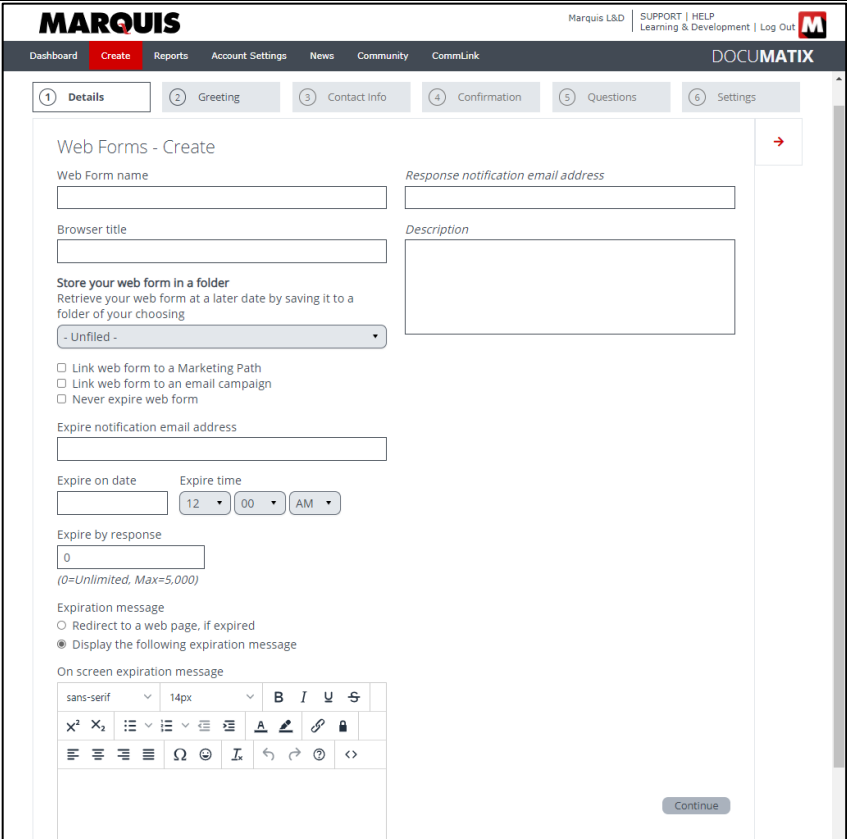
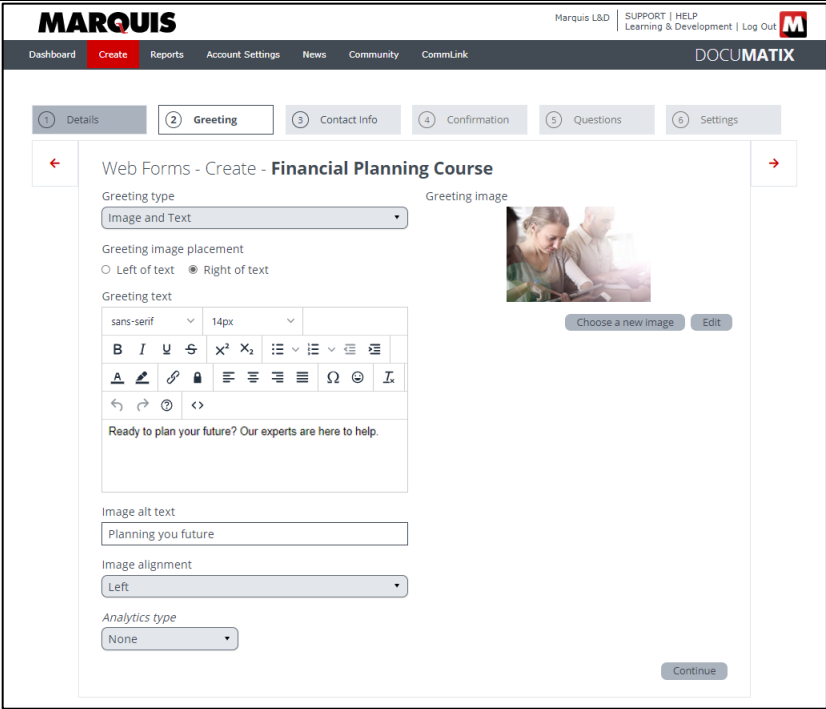
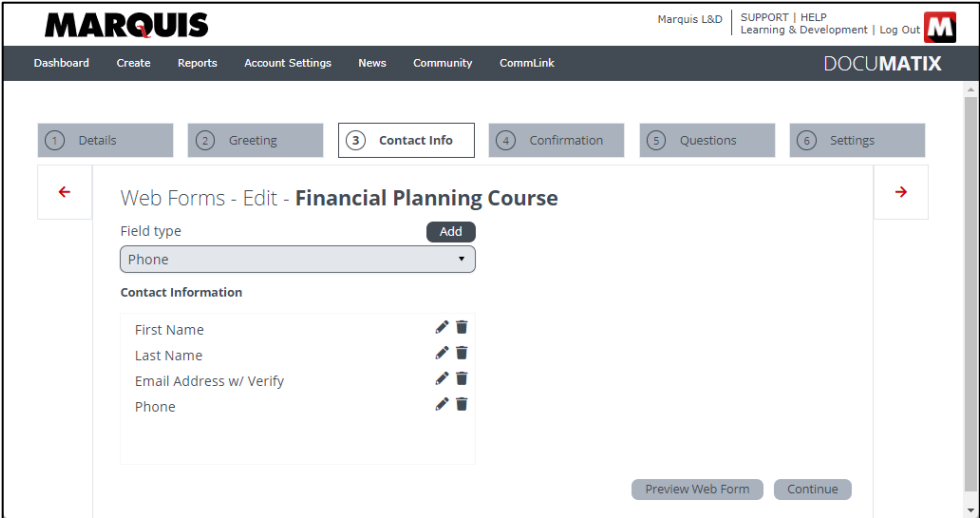



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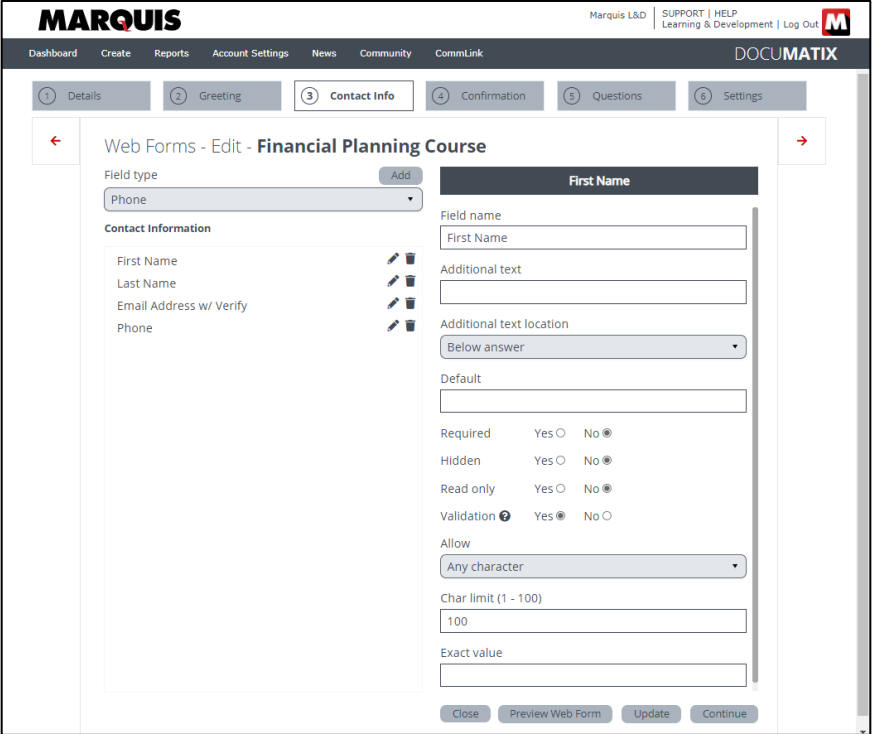
DMX336	Add a Web Form
	Follow this process to learn how to create a new Web Form.
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Web Forms module
Step 3	Click Begin to create a new web form
	 <p>The screenshot shows the Marquis DocuMatix dashboard. At the top, there is a navigation bar with 'Dashboard', 'Create', 'Reports', 'Account Settings', 'News', 'Community', and 'CommLink'. Below this, there are dropdown menus for 'Product Suite' and 'Web Forms'. A red arrow points to the 'Add New' link under 'Product Suite', and another red arrow points to the 'Web Forms' dropdown. Below these, there is a section for 'Add a new web form' with a 'Begin' button highlighted by a red arrow. The dashboard also shows a 'Recent Work' section with tabs for 'Drafts', 'Published', and 'Completed', and a list of recent work items including 'Financial Planning Class', 'Refer A Friend Promo', 'Member Opt-Out of Email Communications', and 'Employee T-Shirts'.</p>
Step 4	Complete the Details 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"> • Web Form name
	<ul style="list-style-type: none"> • Response notification email address (optional)
	<ul style="list-style-type: none"> • Browser title
	<ul style="list-style-type: none"> • Description (optional)
	<ul style="list-style-type: none"> • Folder
	<ul style="list-style-type: none"> • Link web form to a Marketing Path OR Link web form to an email campaign
Note: To setup an email, refer to the Getting Started with Emails guide located within the Overview tab under Help Resources.	
	<ul style="list-style-type: none"> • Never expire web form
4.1	If the Never expire web form option is not enabled, the following options will display:
	<ul style="list-style-type: none"> • Expire notification email address
	<ul style="list-style-type: none"> • Expire on date
	<ul style="list-style-type: none"> • Expire by response
	<ul style="list-style-type: none"> • Expire type <ul style="list-style-type: none"> ○ Expire message ○ Expire redirected URL
	<ul style="list-style-type: none"> • Expire message

<p>Step 5</p>	<p>Click Continue</p> 
<p>Step 6</p>	<p>Complete the Greeting page</p> <ul style="list-style-type: none"> • Greeting Type <ul style="list-style-type: none"> ○ Text ○ Image ○ Image and Text ○ None • Greeting Text • Analytics type (optional) <ul style="list-style-type: none"> ○ None ○ Google Analytics ○ Custom Javascript ○ Custom HTML

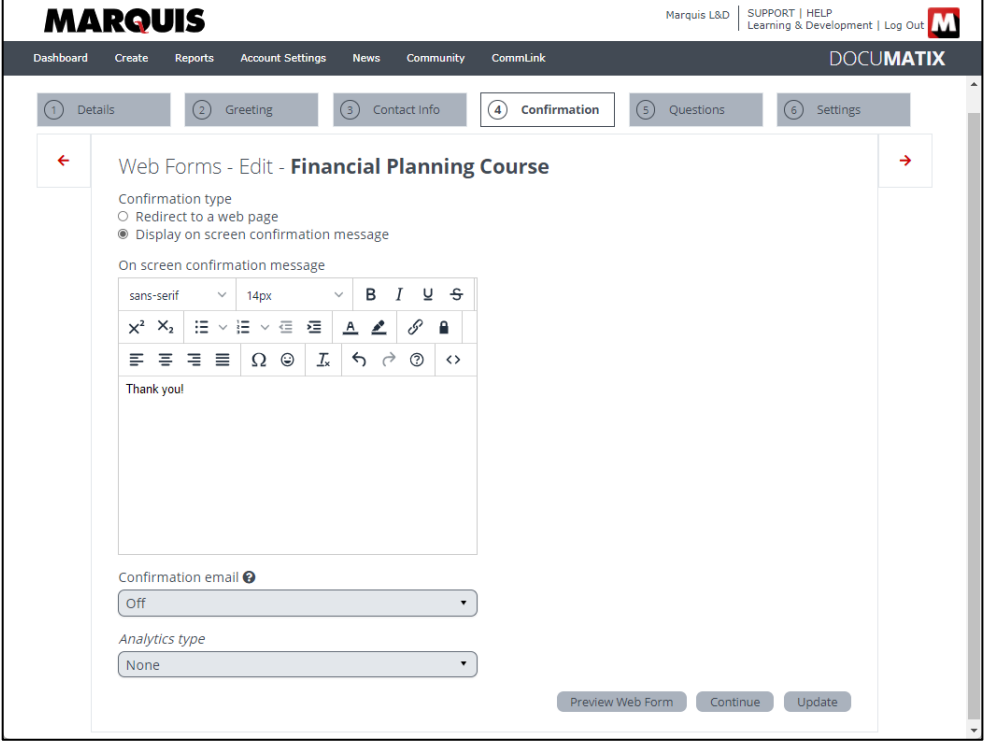
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<p>Step 7</p>	<p>Click Continue</p> 
<p>Step 8</p>	<p>Complete the Contact Info page</p>
<p>Step 9</p>	<p>Click the drop-down arrow and click on a field</p>
<p>Step 10</p>	<p>Click Add to select the field</p>
<p>Step 11</p>	
<p>Step 11</p>	<p>Click the pencil icon  next to each added field to edit to make desired changes</p> <ul style="list-style-type: none"> • Field name
<p></p>	<ul style="list-style-type: none"> • Additional text – includes additional information which may be added to the field (for example: (Last, First, MI))
<p>Note: An example of Additional Text would be to provide additional instructions to the field being filled. So, if you wanted someone to enter their name in as Last, First; the additional text could be used to define that preference.</p>	










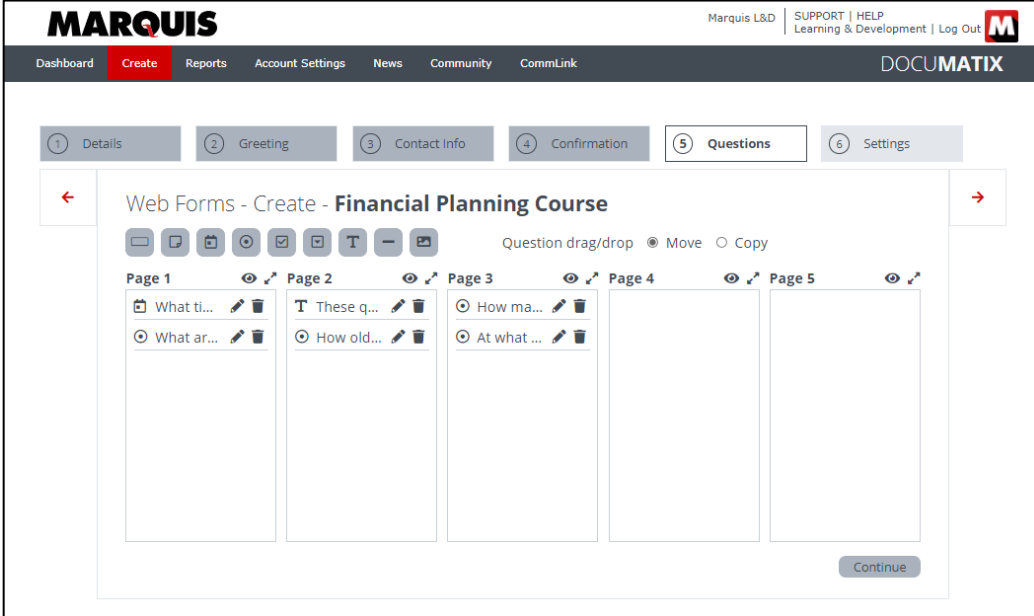
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	<ul style="list-style-type: none"> • Additional text location <ul style="list-style-type: none"> ○ Below Answer ○ Right of field name ○ Below field name • Default – includes information that will be added to the form by default. (For example, in a web form email, this could be a default email address that would receive any information gathered in the web form).
<p>Note: The default field is required to process a web form when the field is marked as hidden. If a field is not marked as hidden, the default field is optional.</p>	
	<ul style="list-style-type: none"> • Require – Yes or No • Hidden – Yes or No (to hide the selected field) • Read only – Yes or No • Validation – Yes or No
11.1	<p>If Validation is set to Yes, the following settings will be enabled for updating:</p> <ul style="list-style-type: none"> • Allow <ul style="list-style-type: none"> ○ Any character ○ Alpha/numeric ○ Alpha only ○ Numeric only ○ Exact value • Character limit • Exact Value
11.2	<p>Click Update</p>
11.3	<p>If a field was added in error, simply click the trash can icon  next to it in the Contact Information box. Click Yes to the confirmation message.</p>
	 <p>The screenshot shows the Marquis web form editor interface. At the top, there is a navigation bar with 'MARQUIS' on the left and 'Marquis L&D SUPPORT HELP Learning & Development Log Out' on the right. Below the navigation bar, there are tabs for 'Details', 'Greeting', 'Contact Info', 'Confirmation', 'Questions', and 'Settings'. The main content area is titled 'Web Forms - Edit - Financial Planning Course'. On the left, there is a 'Field type' dropdown menu set to 'Phone'. Below this is a 'Contact Information' section with a list of fields: 'First Name', 'Last Name', 'Email Address w/ Verify', and 'Phone'. Each field has an edit icon and a trash can icon. On the right, there is a detailed configuration panel for the 'First Name' field. It includes fields for 'Field name' (set to 'First Name'), 'Additional text', 'Additional text location' (set to 'Below answer'), 'Default' (empty), 'Required' (Yes <input type="radio"/>, No <input checked="" type="radio"/>), 'Hidden' (Yes <input type="radio"/>, No <input checked="" type="radio"/>), 'Read only' (Yes <input type="radio"/>, No <input checked="" type="radio"/>), 'Validation' (Yes <input checked="" type="radio"/>, No <input type="radio"/>), 'Allow' (set to 'Any character'), 'Char limit (1 - 100)' (set to '100'), and 'Exact value' (empty). At the bottom of the configuration panel, there are buttons for 'Close', 'Preview Web Form', 'Update', and 'Continue'.</p>

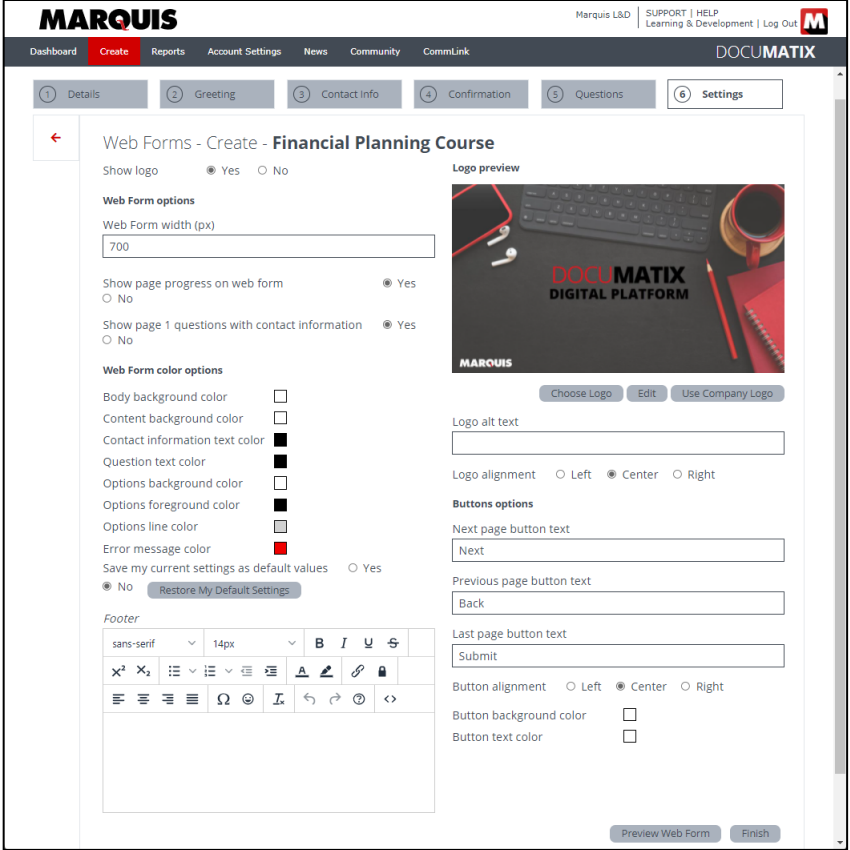
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Step 12	Click Continue once all necessary fields are selected and their settings have been made
Step 13	Complete the Confirmation page
	<ul style="list-style-type: none">• Confirmation type<ul style="list-style-type: none">○ Redirect to a web page○ Display on screen confirmation message• Confirmation email• Analytics type (optional)
Step 14	Click Continue
	

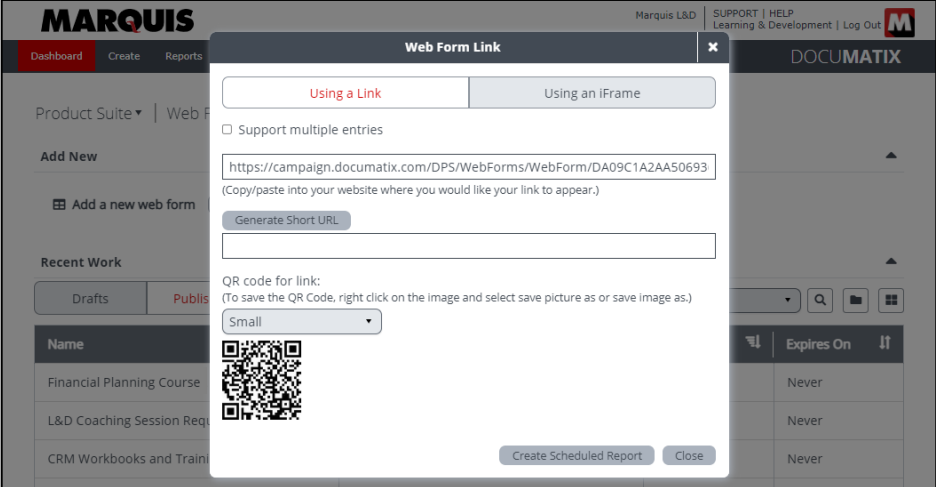
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Step 15	Complete the Questions page
	Select an icon that corresponds to the function desired by "Click, Drag, and Drop" the icon into the desired page of the web form being created
	<ul style="list-style-type: none">  Text
	<ul style="list-style-type: none">  Memo
	<ul style="list-style-type: none">  Date
	<ul style="list-style-type: none">  Radio
	<ul style="list-style-type: none">  Checkbox
	<ul style="list-style-type: none">  Drop-down
	<ul style="list-style-type: none">  Custom Text
	<ul style="list-style-type: none">  Line
	<ul style="list-style-type: none">  Image
Step 16	Click Continue
	

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Step 17	Complete the Settings page
	<ul style="list-style-type: none"> • Show logo
	<ul style="list-style-type: none"> • Web Form width
	<ul style="list-style-type: none"> • Show page progress on web form
	<ul style="list-style-type: none"> • Show page 1 questions with contact information
	<ul style="list-style-type: none"> • Web form color options
	<ul style="list-style-type: none"> • Save my current settings as default values
	<ul style="list-style-type: none"> • Footer (optional)
	<ul style="list-style-type: none"> • Choose Logo
	<ul style="list-style-type: none"> • Logo alt text
	<ul style="list-style-type: none"> • Logo alignment
	<ul style="list-style-type: none"> • Next page button text
	<ul style="list-style-type: none"> • Previous page button text
	<ul style="list-style-type: none"> • Last page button text
	<ul style="list-style-type: none"> • Submit button alignment
	<ul style="list-style-type: none"> • Button background color
	<ul style="list-style-type: none"> • Button text color
	
Step 18	Click Finish
Step 19	Click on the Web Form and click Publish
Step 20	Click Yes

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<p>Step 21</p>	<p>A Web Form Link page will appear with all of the link information regarding the web form.</p>
	
	<p>If desired, there is an option to create a Scheduled Report for the Web Form. Move to the next step if that is something you would like to setup.</p>
<p>Step 22</p>	<p>Click Create Scheduled Report</p>
<p>Step 23</p>	<p>Complete Add Scheduled Report page</p>
	<ul style="list-style-type: none"> • Report Type
	<ul style="list-style-type: none"> • Web Forms
	<ul style="list-style-type: none"> • Report name
	<ul style="list-style-type: none"> • Email addresses
	<ul style="list-style-type: none"> • Start date
	<ul style="list-style-type: none"> • Expire date
	<ul style="list-style-type: none"> • Frequency
	<ul style="list-style-type: none"> • Days of the week
	<ul style="list-style-type: none"> • Time of the day
<p>Step 24</p>	<p>Click Submit</p>
	