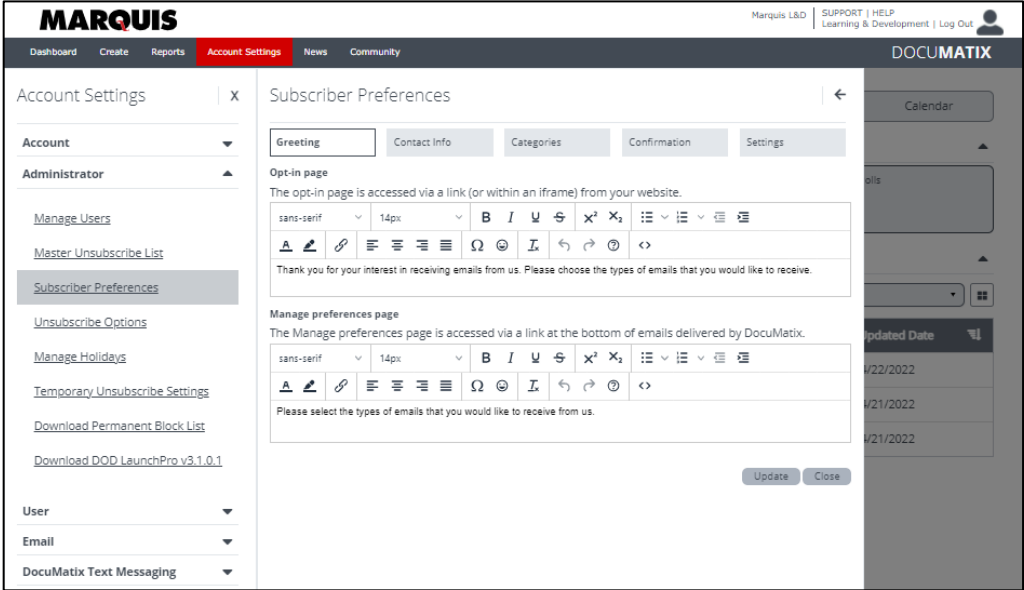
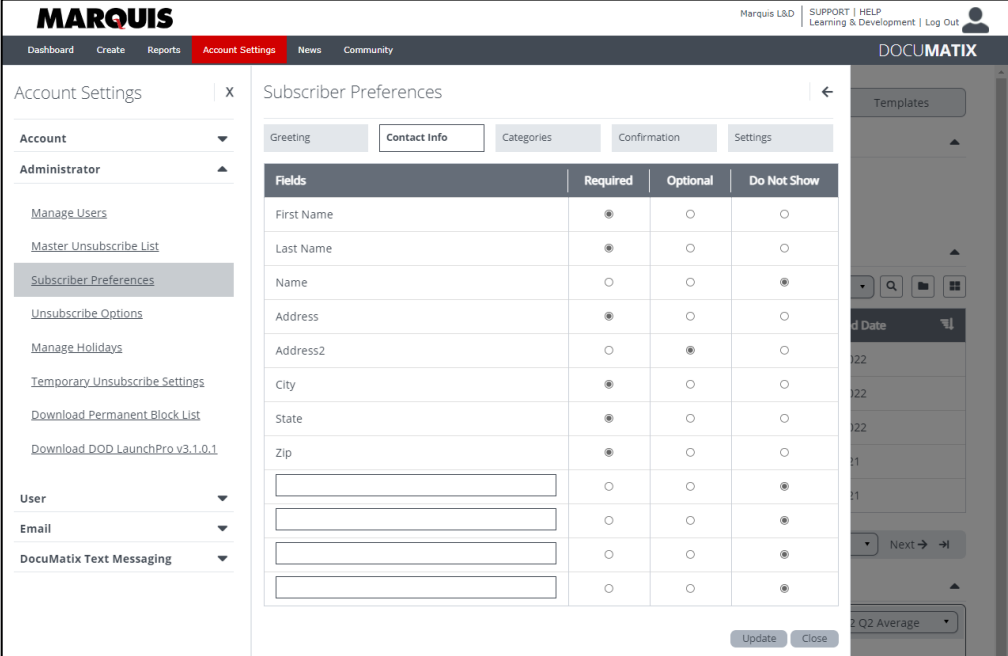


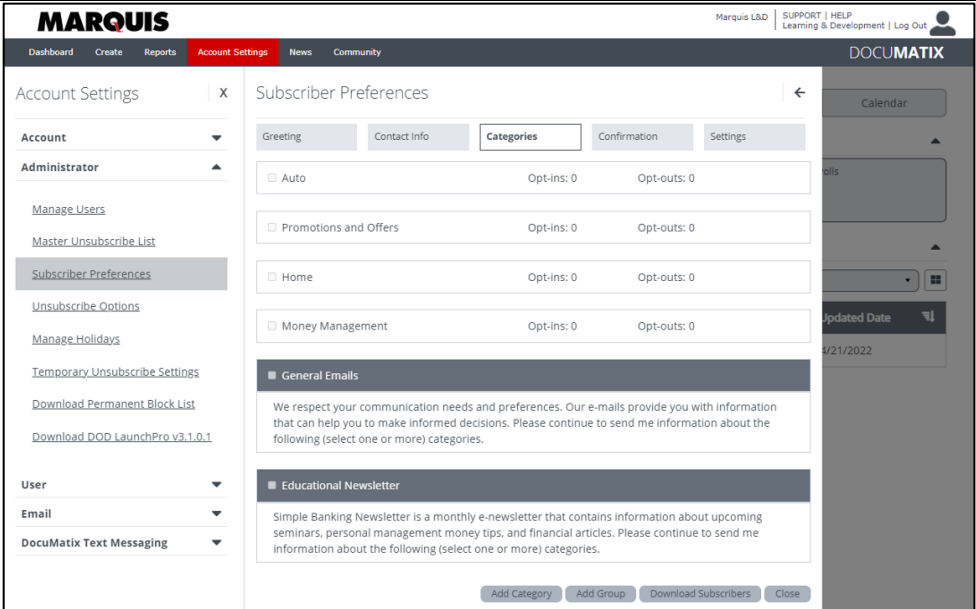
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<b>DMX305</b>	<b>Set Up Subscriber Preferences</b>
	Use this procedure document to learn how to set up subscriber preferences within the Administrator section of Account Settings. <b>Please note, Subscriber Preferences are limited to only one Marketing Account and cannot be applied to multiple DocuMatix accounts.</b>
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>DocuMatix</b>
<b>Step 2</b>	Click <b>Account Settings</b>
<b>Step 3</b>	From the fly-out menu, click <b>Administrator</b>
<b>Step 4</b>	Click <b>Subscriber Preferences</b>
<b>Step 5</b>	Complete the <b>Greeting</b> tab:
5.1	Enter a greeting for the <b>Opt-in page</b>
5.2	Enter a greeting for the <b>Manage Preferences page</b>
<b>Step 6</b>	Click <b>Update</b> to save changes
	
<b>Step 7</b>	Click the <b>Contact Info</b> tab
7.1	Click the appropriate <b>radio dial</b> to apply the desired setting to the field
<b>Step 8</b>	To add an <b>additional contact field</b> , enter the desired name in one of the blank contact fields
8.1	Select the appropriate <b>radio dial</b> to apply the desired setting to that additional field

<p><b>Step 9</b></p>	<p>Click <b>Update</b> to save changes</p> 
<p><b>Step 10</b></p>	<p>Click the <b>Categories</b> tab</p>
<p><b>Step 11</b></p>	<p>To add a new category, click the <b>Add Category</b> button</p>
<p>11.1</p>	<p>Enter a <b>name</b> for the Category</p>
<p>11.2</p>	<p>Enter a <b>description</b> for the Category</p>
<p>11.3</p>	<p>Click <b>Save</b></p>
<p><b>Step 12</b></p>	<p>To <b>edit</b> a Category, hover over the white box, and click the <b>pencil icon</b> located to the right of the Category name</p>
<p>12.1</p>	<p>Make the necessary changes and click <b>Save</b></p>
<p><b>Step 13</b></p>	<p>To <b>delete</b> a Category, hover over the white box, and click the <b>trash can icon</b> located to the right of the Category name</p>
<p>13.1</p>	<p>Type <b>DELETE</b> into the confirmation message and click <b>Delete</b></p>
<p><b>Step 14</b></p>	<p>To add a new Group, click the <b>Add Group</b> button</p>
<p><b>Note:</b> The Groups are added to the categories and are used for customer opt-ins and opt-outs.</p>	
<p>14.1</p>	<p>Enter a <b>name</b> for the Group</p>
<p>14.2</p>	<p>Enter a <b>description</b> for the Group</p>
<p>14.3</p>	<p>Click <b>Save</b></p>
<p><b>Step 15</b></p>	<p>To <b>edit</b> a Group, hover over the gray box, and click the <b>pencil icon</b> located to the right of the Group name</p>
<p>15.1</p>	<p>Make the necessary changes and click <b>Save</b></p>
<p><b>Step 16</b></p>	<p>To <b>delete</b> a Group, hover over the gray box, and click the <b>trash can icon</b> located to the right of the Group name</p>
<p>16.1</p>	<p>Click <b>Yes</b> to the confirmation message</p>
<p><b>Step 17</b></p>	<p>Click and drag the Category to place it within the desired Group</p>

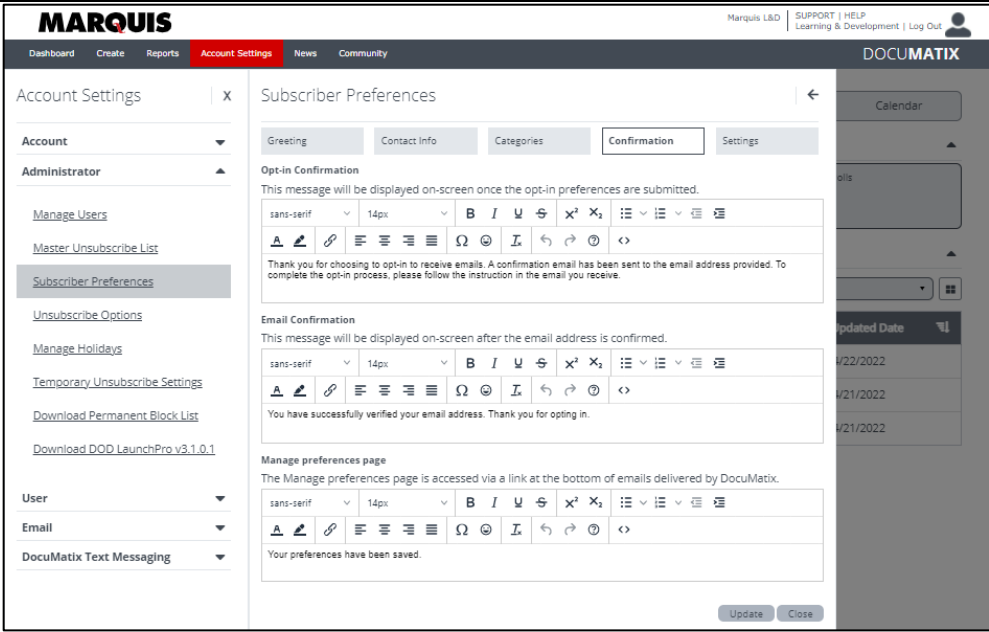
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**Step 18** Click the **Download Subscribers** button to view the names of those who have subscribed to each category

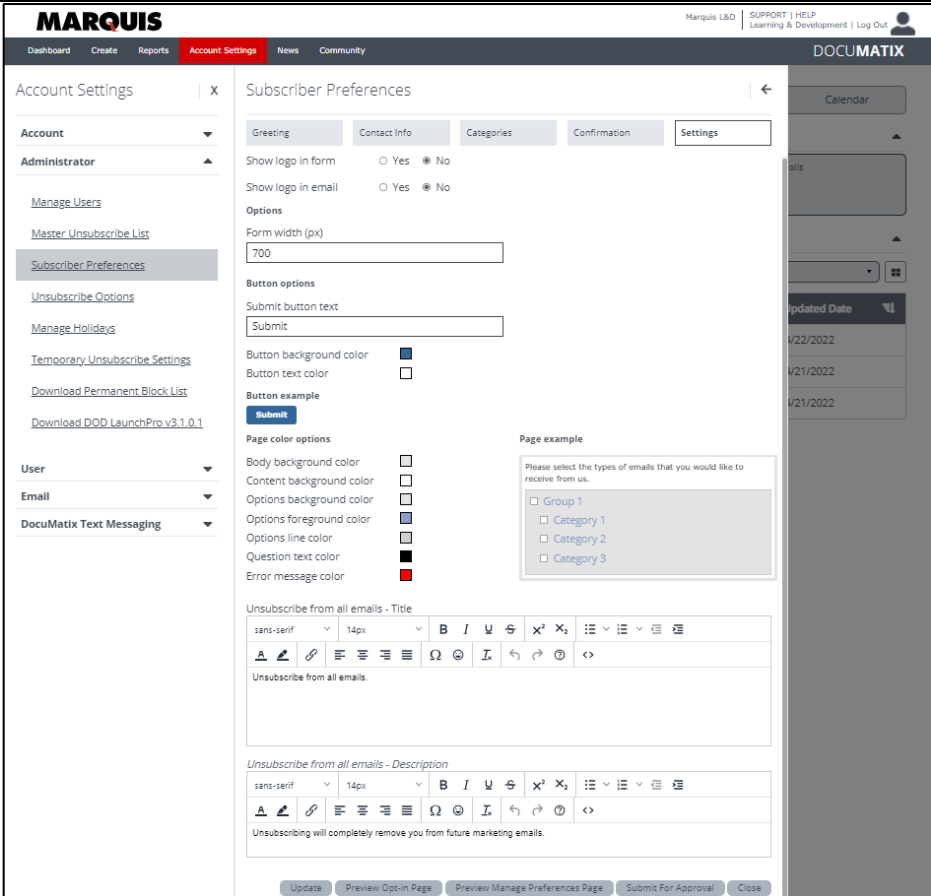


**Note:** The subscriber categories will need to include every type of email that will be sent. It is important to note that if a category is added after Subscriber Preferences are active, all members who have set their preferences will not be opted into the new category.

- Step 19** Click the **Confirmation** tab
- 19.1 Enter a message into the **Opt-In Confirmation** text box
  - 19.2 Enter a message into the **Email Confirmation** text box
  - 19.3 Enter a message into the **Manage Preferences page** text box
- Step 20** Click **Update** if any changes were made



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<b>Step 21</b>	Click the <b>Settings</b> tab
<b>Step 22</b>	Complete or update any selections within the <b>Settings</b> tab, if desired
<b>Step 23</b>	Click <b>Update</b> to save changes
	
	The bottom of the page contains several buttons for various actions:
	<ul style="list-style-type: none"> <li>• <b>Preview Opt-in Page:</b> Opens a preview of the Opt-in page in another window</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Preview Manage Preferences Page:</b> Opens a preview of the Subscriber Preferences page in another window.</li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Submit for Approval:</b> Submits the subscriber preferences within the Categories tab to DocuMatix support for approval</li> </ul>
<b>Step 24</b>	If any changes are made to the Categories tab, click <b>Submit for Approval</b>
	<p><b>Note:</b> If Subscriber preferences have been submitted for approval, email the client support team at <a href="mailto:dsupport@gomarquis.com">dsupport@gomarquis.com</a> to provide a list of all published Trigger and Marketing Path emails with the corresponding category.</p>
<b>Step 25</b>	Once the list has been approved, view the list within the <b>Categories</b> tab
	<p><b>Note:</b> Within 2-3 business days, Marquis will add the categories to the existing published triggered emails. At this point, subscriber preferences are “live”, meaning they are available to be categorized and the manage preferences link will appear within the email footer.</p>
	Now the categories will be available for selection when publishing an email

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**Note:** If a client has opted out of a category, they won't receive the email. When an email is published, you will be given an option to include recipients who have opted into the selected category.