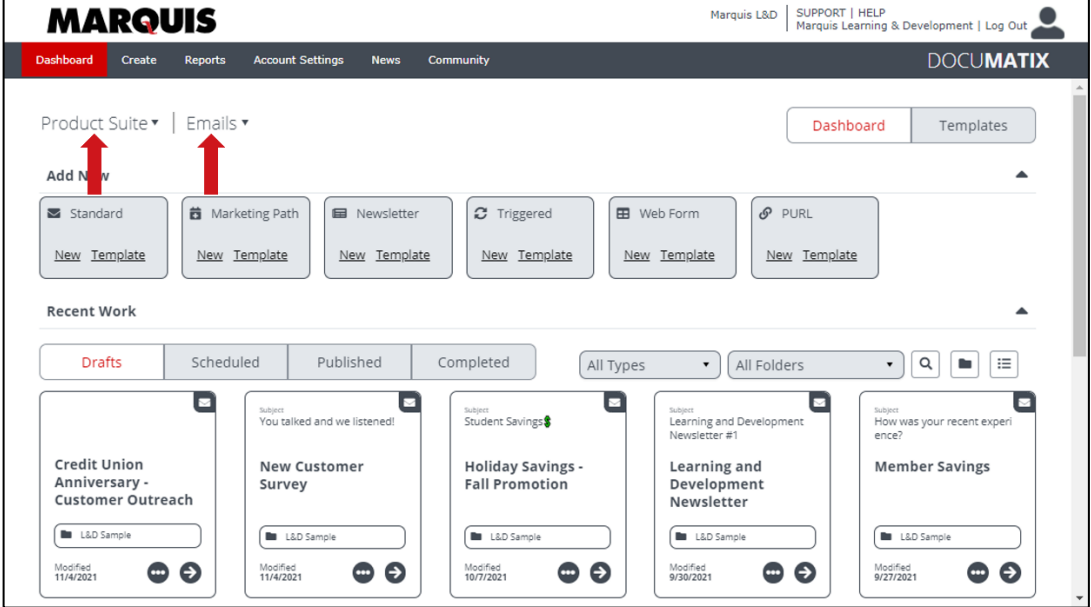



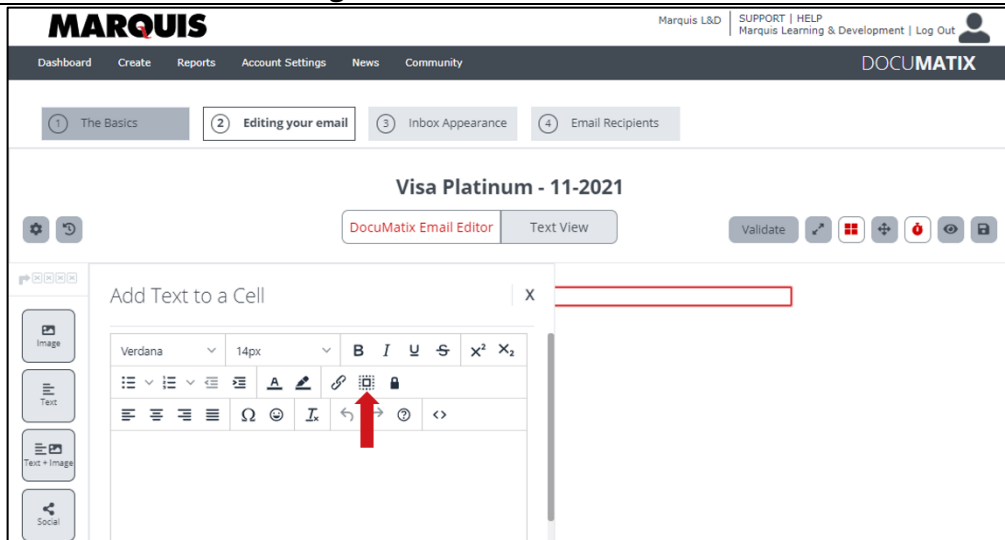
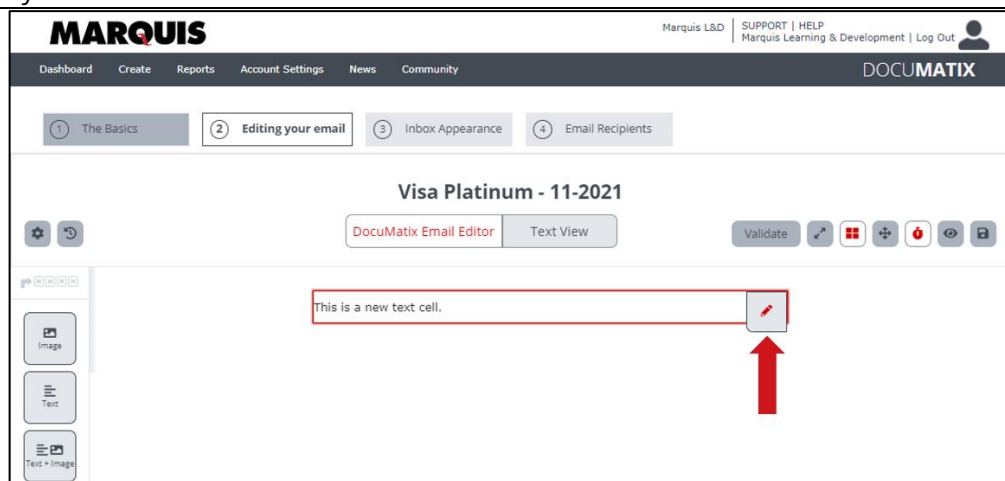


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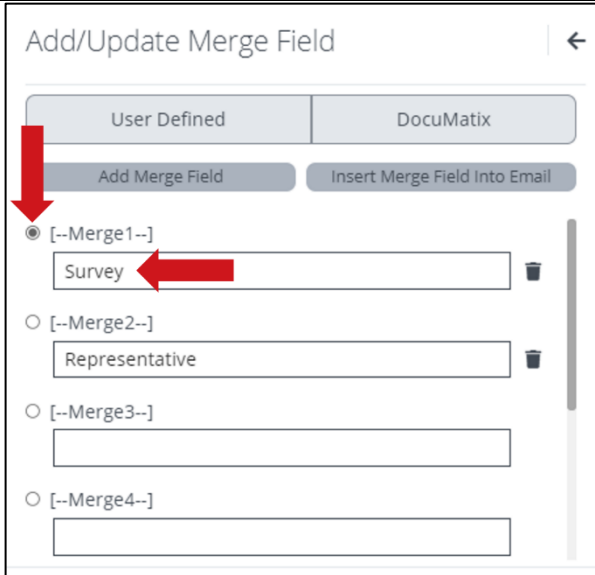

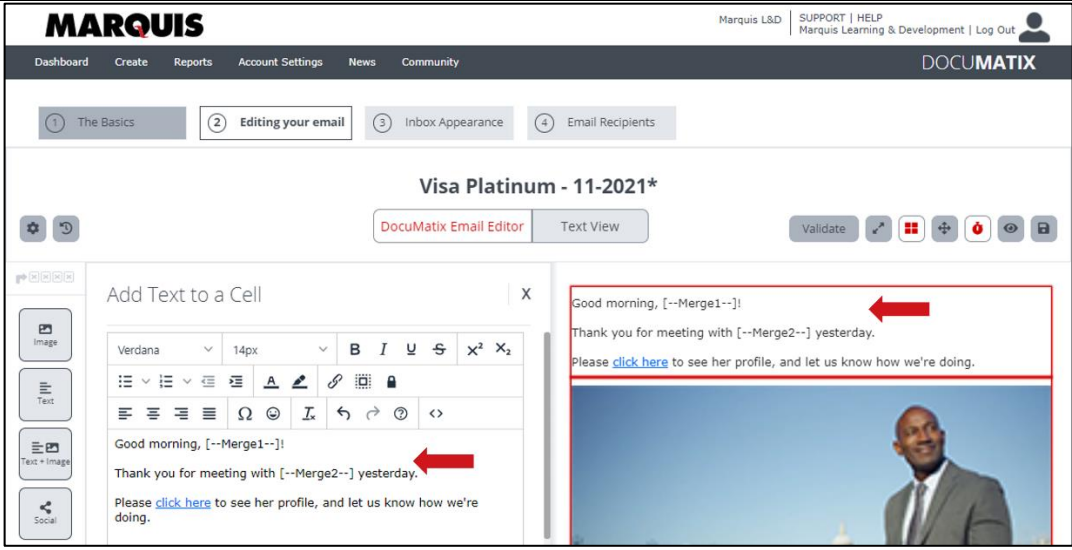
<b>DMX318</b>	<b>Setting Up Merge Fields</b>
	Use this procedure to learn how to set up merge fields, which allow information to flow from the CSV (data) file into the email. For more information, refer to procedure <b>DMX375 How To Schedule An Email Launch</b> .
<b>Order of Steps</b>	<b>Tasks</b>
<b>Step 1</b>	Log into <b>DocuMatix</b>
<b>Step 2</b>	Select the <b>Product Suite</b> product and the <b>Emails</b> module
	
<b>Step 3</b>	Under the Add New section, click <b>New</b> or <b>Template</b> on the card of the desired email type
<b>Step 4</b>	Complete <b>The Basics</b> page
	<b>Note:</b> 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"> <li>Name</li> </ul>
	<ul style="list-style-type: none"> <li>Description (optional)</li> </ul>
	<ul style="list-style-type: none"> <li>Store your email in a folder</li> </ul>
	<ul style="list-style-type: none"> <li>Would you like to use the DocuMatix Editor or would you like to import HTML instead? (only if creating the email from scratch. For more information, refer to procedure <b>DMX301 Creating an Email From Scratch</b>.)</li> </ul>
	<ul style="list-style-type: none"> <li>Layout Mode</li> </ul>
	<b>Note:</b> 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.
<b>Step 5</b>	Click <b>Continue</b> to advance to the <b>Editing your email</b> page
<b>Step 6</b>	Within the <b>Editing your email</b> page, “Click, Drag, and Drop” the <b>Text</b> icon  to place the text cell in the desired location of the email.

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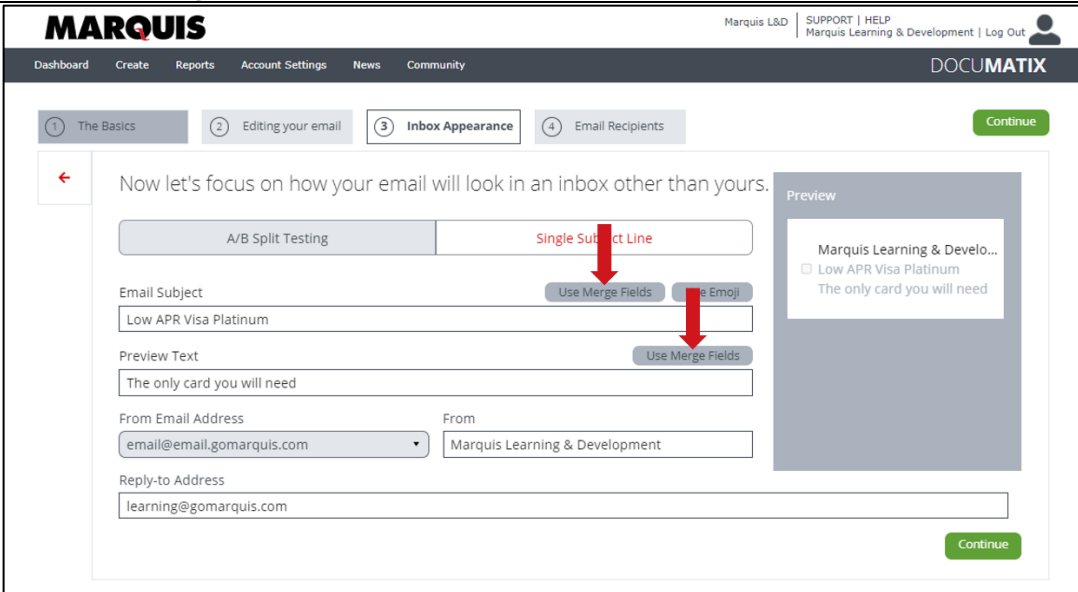
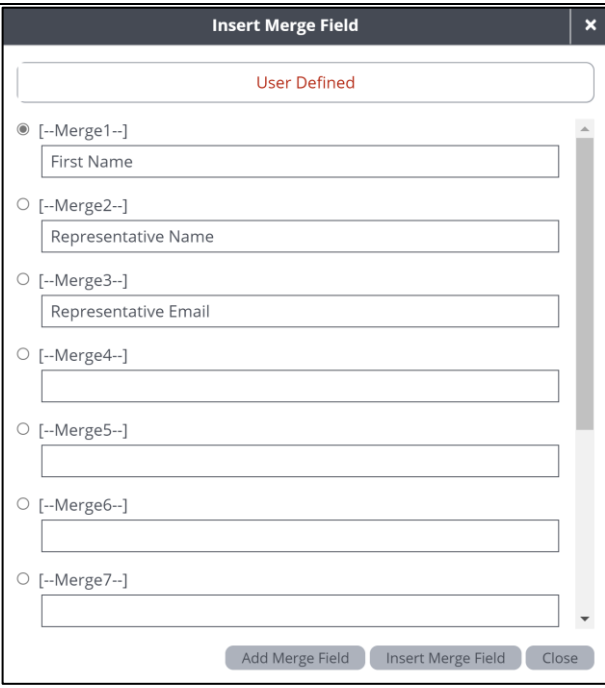
<b>Step 7</b>	Hover your mouse over the text cell and click the <b>Edit</b> icon 
<b>Step 8</b>	Position the cursor in the desired location of the email text where the merge field will be placed and click the <b>Insert Merge Field</b> icon 
<b>Step 9</b>	Click the radio button and type a description of the data to be merged into the corresponding text field
<b>Step 10</b>	Click the <b>Insert Merge Field Into Email</b> button
<b>Step 11</b>	Review the <b>Add Text to a Cell</b> window to confirm the merge fields are placed in the correct location of the email text



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<b>Step 12</b>	Repeat steps 8-11 for each necessary merge field 
<b>Step 13</b>	Click <b>Save</b>  
<b>Step 14</b>	Click the <b>Inbox Appearance</b> tab
<b>Step 15</b>	If a merge field is to be placed into the <b>Email Subject</b> , place the cursor within the text box in the desired location where the merge field will be inserted

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<b>Step 16</b>	Click the <b>Use Merge Fields</b> button 
<b>Step 17</b>	Click the radio button and type a description of the data to be merged into the corresponding text field
<b>Step 18</b>	Click the <b>Insert Merge Field</b> button 
<b>Step 19</b>	Once you have returned to the <b>Inbox Appearance</b> page, confirm that the merge fields are placed correctly in the Subject field.
<b>Step 20</b>	If desired, repeat steps 15-19 to add a merge field to the <b>Preview Text</b>
<b>Step 21</b>	Once all information is present on the details page, click <b>Continue</b> to complete the <b>Email Recipients</b> page.