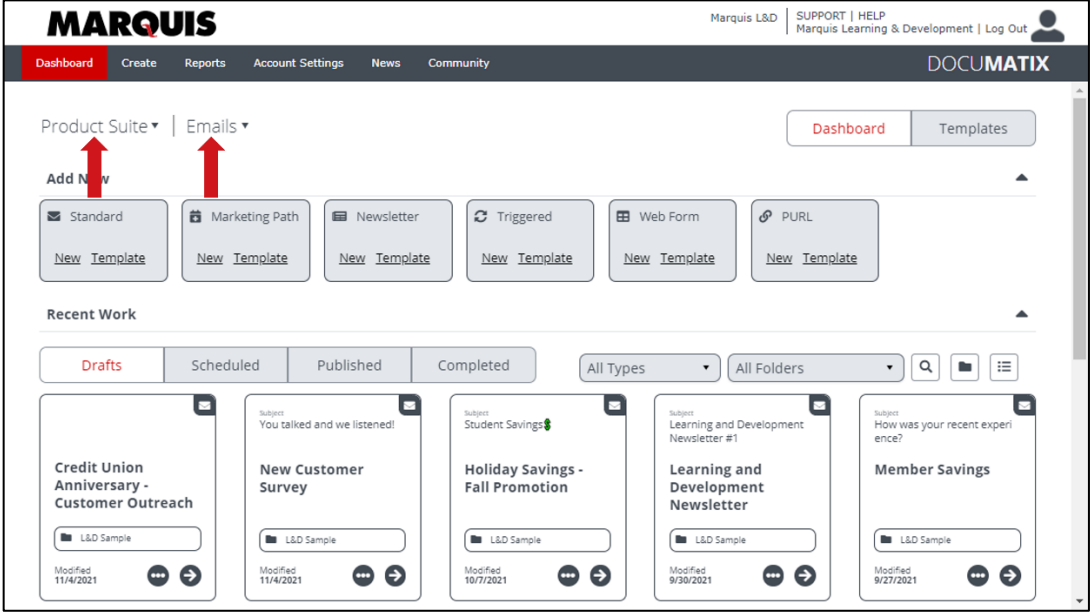


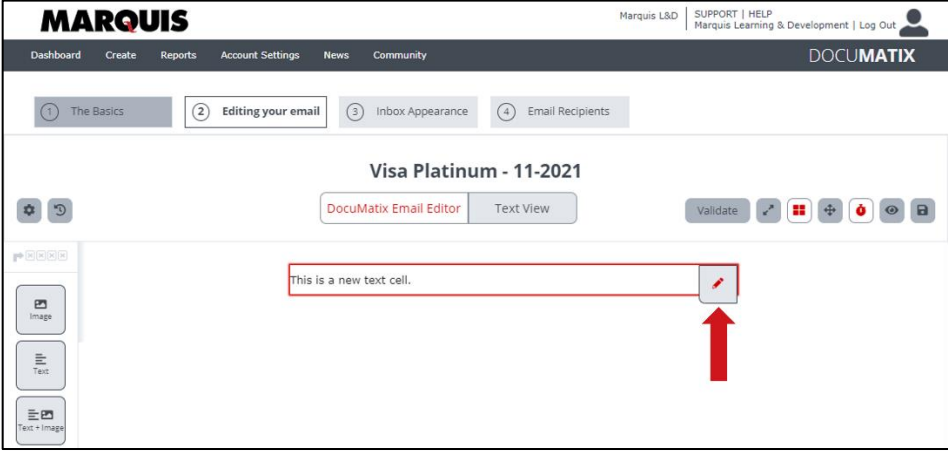

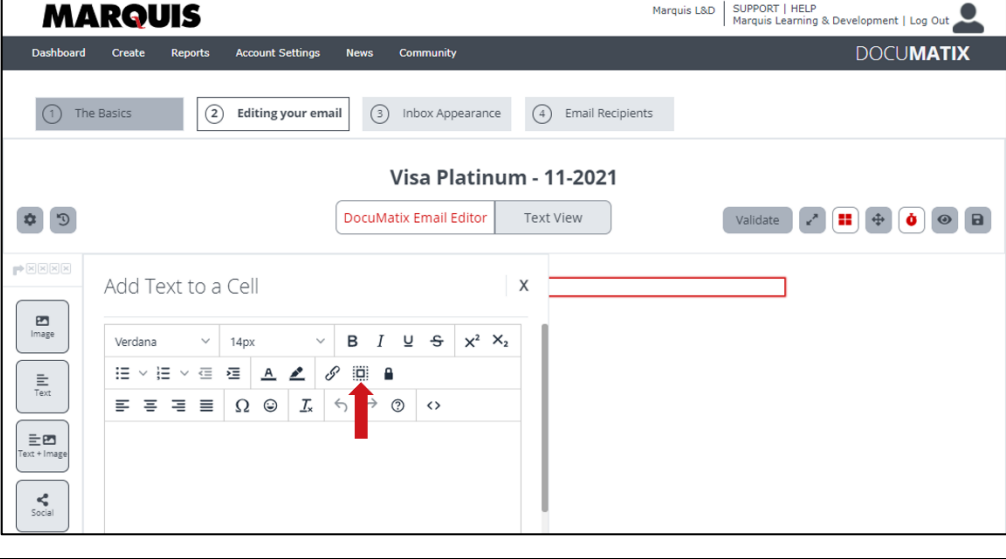


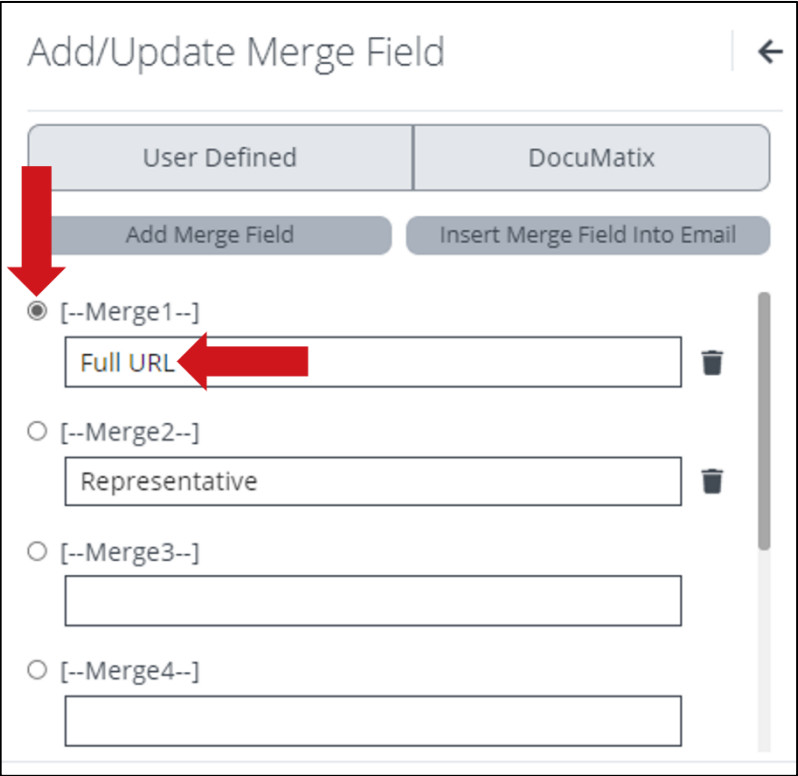
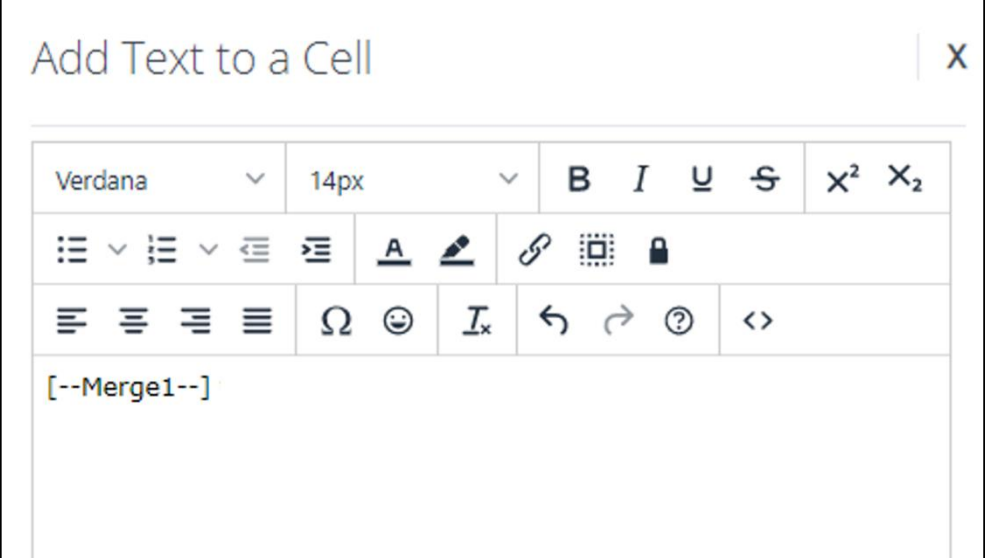
MARQUIS

DMX370	Add a Variable URL with Partial Merge Fields
	<p>This procedure is intended for DocuMatix users who wish to include a different URL in an email for varying recipients. The variable URLs will be located in the CSV file.</p> <p>For example: this process could be used when different loan officers have helped different customers, and the merge fields might be their signatures.</p>
Order of Steps	Tasks
Step 1	Log into DocuMatix
Step 2	Select the Product Suite product and the Emails module
	
Step 4	Under the Add New section, click New or Template on the card of the desired email type
Step 5	Complete the The Basics 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"> • 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 6	Click Continue to advance to the Editing your email page
Step 7	<p>Select the text icon  and "Click, Drag, and Drop" the icon into the body of the email being created</p>

MARQUIS

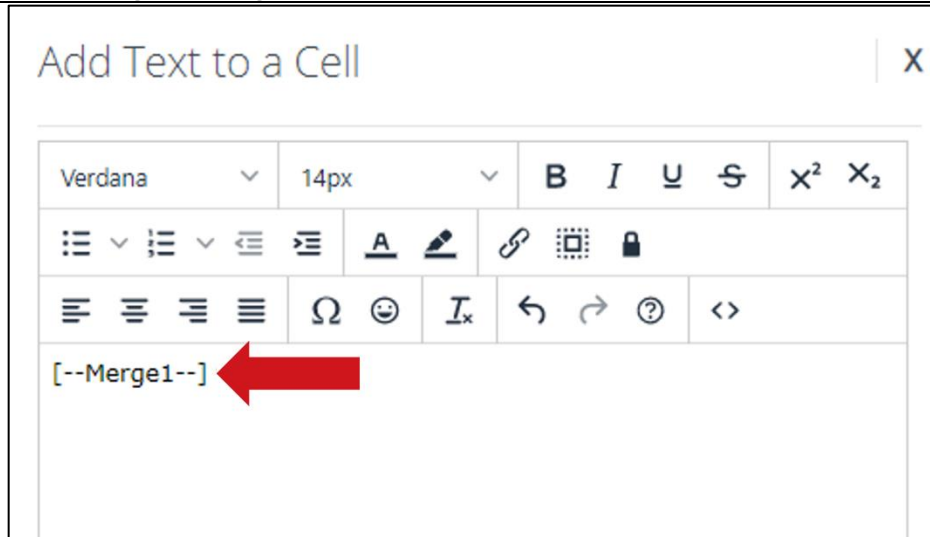
Step 8	Hover over the blank text cell and click the Edit icon  to access the editor.
	
Step 9	Once inside the text cell editor, click the merge field  icon
	
Step 10	Click the radio button next to the available merge field


MARQUIS

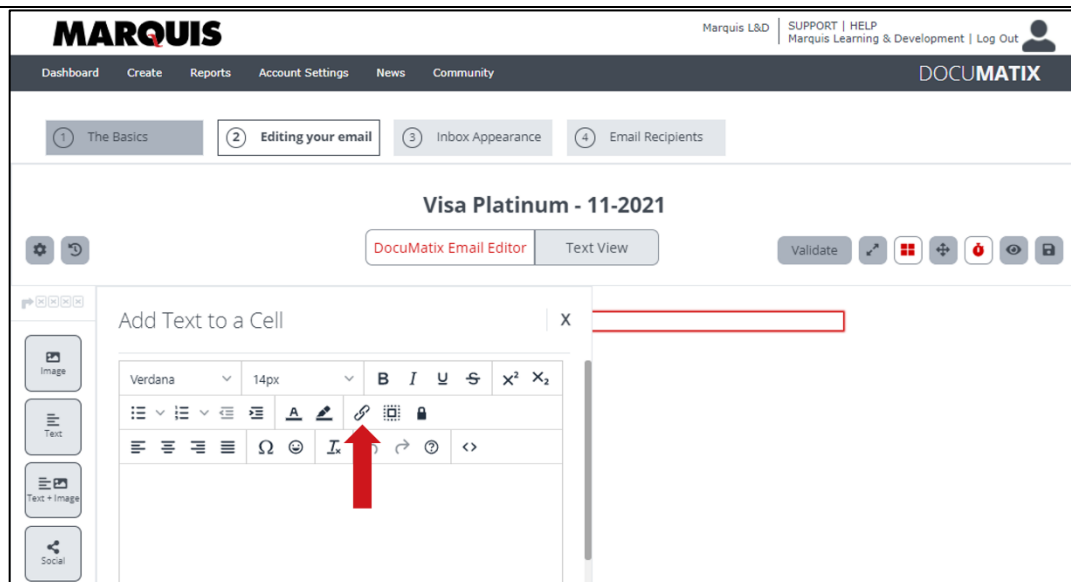
Step 11	Enter the desired name for the merge field in the blank field 
Step 12	Click Insert Merge Field Into Email 

MARQUIS

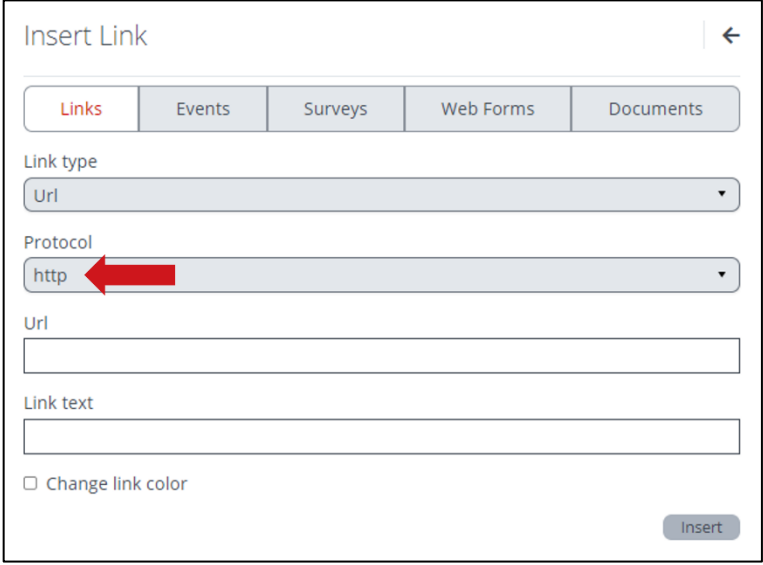
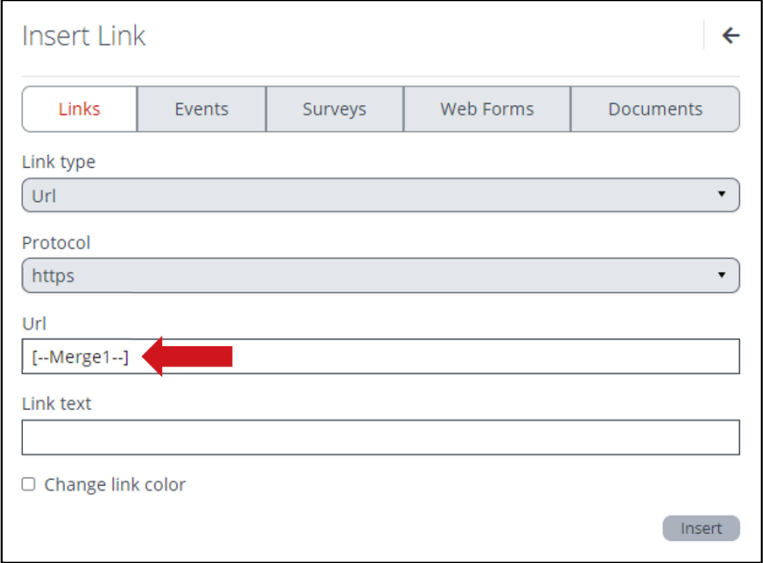
Step 14 Highlight the merge field, right click, and select **Cut**



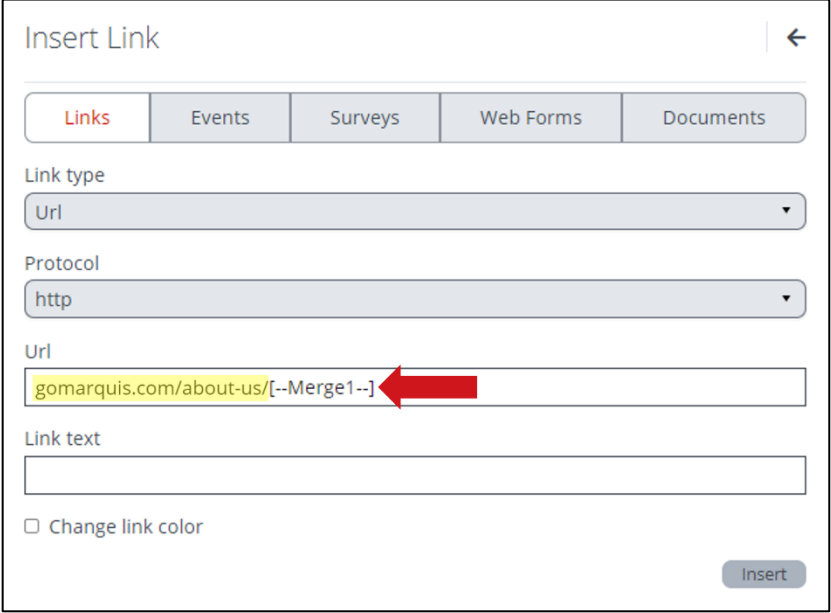
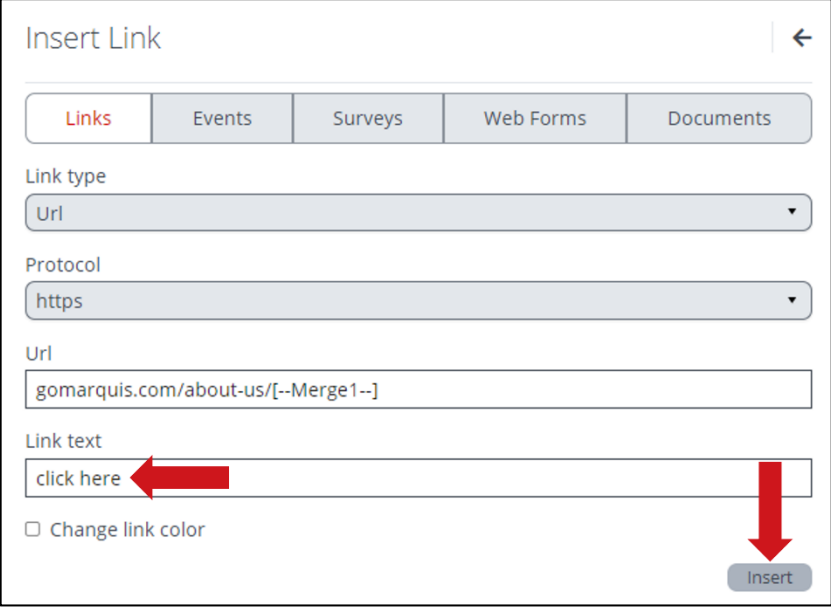
Step 15 Click the link icon 



MARQUIS

Step 16	Click the Protocol drop-down arrow, and select http or https
	 <p>The screenshot shows the 'Insert Link' dialog box with the following elements: a title bar with a back arrow; a tabbed interface with 'Links' selected; 'Link type' set to 'Url'; 'Protocol' dropdown menu open with 'http' selected (indicated by a red arrow); an empty 'Url' text field; an empty 'Link text' text field; a 'Change link color' checkbox; and an 'Insert' button.</p>
Step 17	Click into Url field, tight click, and select Paste
	 <p>The screenshot shows the 'Insert Link' dialog box with the following elements: a title bar with a back arrow; a tabbed interface with 'Links' selected; 'Link type' set to 'Url'; 'Protocol' dropdown menu open with 'https' selected; the 'Url' text field containing '[--Merge1--]' (indicated by a red arrow); an empty 'Link text' text field; a 'Change link color' checkbox; and an 'Insert' button.</p>
Step 18	Locate and copy the static portion of the URL (portion that cannot be modified).





MARQUIS

Step 19	Paste the static portion of the URL <i>before the merge field</i> into the Url field
Note: This will ensure that each recipient listed in the data file will receive their intended variable link.	
Note: The highlighted portion of the URL is the static piece which will remain constant. The merge field will be variable piece that depends on the data provided within the CSV file loaded.	
	
Step 20	In the Link text field, type the desired text to display as a hyperlink in place of the URL, such as "click here", etc.
Step 21	Click Insert
	

MARQUIS

Note: Additional modifications and updates can be made within the email editor if desired.	
	click here to see her profile, and let us know how we're doing.'"/>
Step 21	Click Save
Step 22	When the text cell is ready, click the X at the top right-hand corner of the box to close the Add Text to a Cell window
Step 23	Optional: Preview the email by clicking the Preview icon
23.1	Select the desired preview option.
	click here to see her profile, and let us know how we're doing.'"/>
	<ul style="list-style-type: none">Here, preview with data by typing placeholder data into the fields below, to display a preview of the email.

MARQUIS

	<div data-bbox="341 199 1421 777"><p>DOCUMATIX Download PDF </p><p>Email Preview - New Auto Campaign Preview On Desktop </p><p>HTML TEXT Close </p><p>▶ Email Links</p><hr/><p>FROM: Marquis Learning & Development [email@email.gomarquis.com] REPLY-TO: learning@gomarquis.com SUBJECT: Auto Campaign </p><p>Merge Fields</p><p>Survey [--Merge1--] Representative [--Merge2--] [Survey] [Representative]</p><p><input type="button" value="Preview With Data"/> <input type="checkbox"/> Display highlights</p><p style="text-align: center;">Auto Campaign To view this email as a web page, go here</p><div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 0 auto;"><p>Good morning! Thank you for meeting with Maggie yesterday. Please click here to see her profile, and let us know how we're doing.</p></div></div>
	<ul style="list-style-type: none">• Alternatively, the preview with uploaded data option will populate the designated merge fields with data from a CSV file. The CSV file needs to be attached to the email to be able to use this function.