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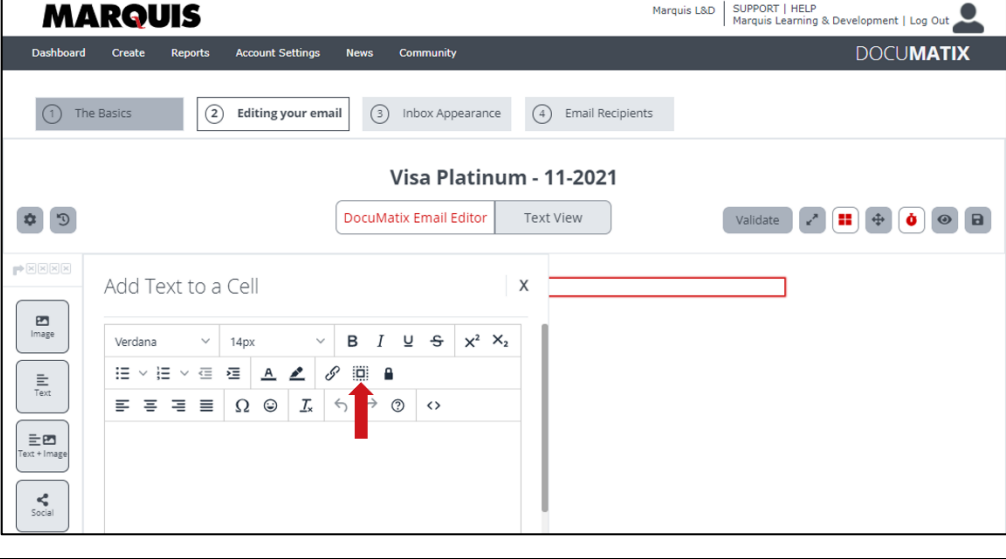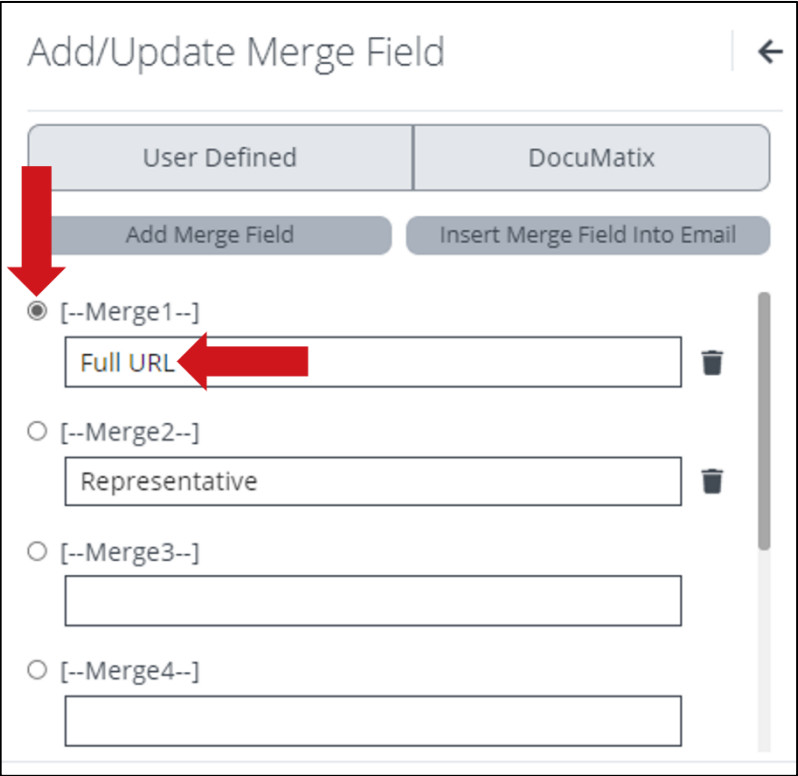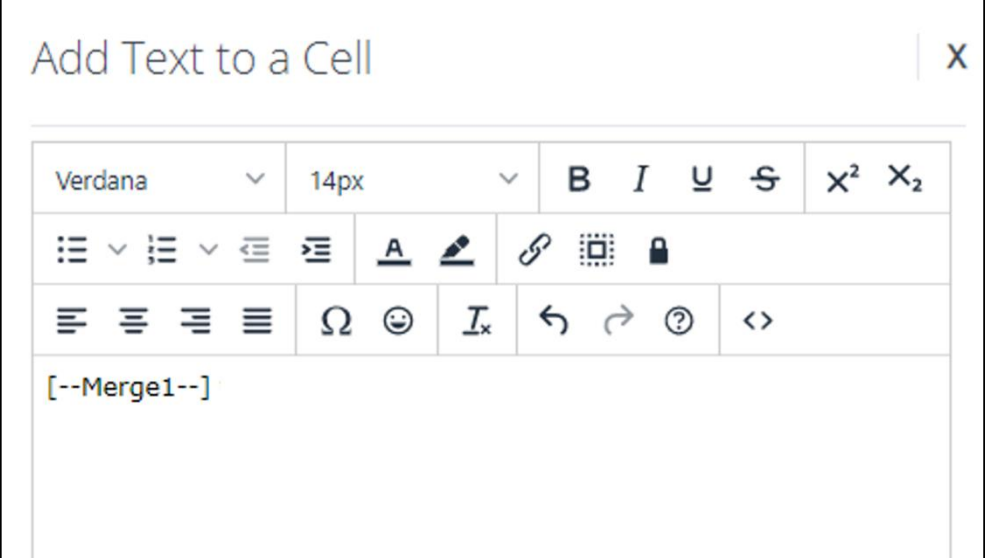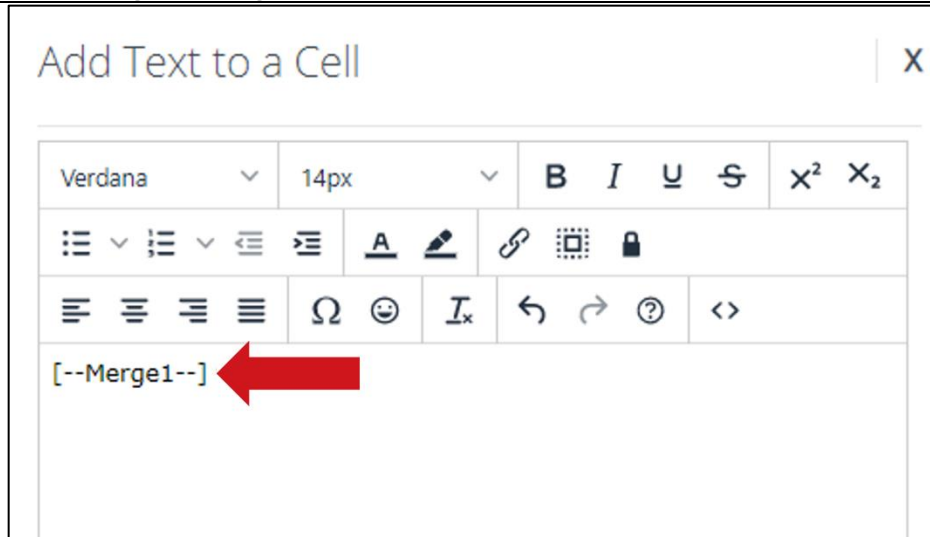| DMX370	Add a Variable URL with Partial Merge Fields
	This procedure is intended for DocuMatix users who wish to include a different URL in an email for varying recipients. The variable URLs will be located in the CSV file. For example: this process could be used when different loan officers have helped different customers, and the merge fields might be their signatures.
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.	
	• Name
	• Description (optional)
	• Store your email in a folder
	• 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	Select the text icon [Text] and "Click, Drag, and Drop" the icon into the body of the email being created

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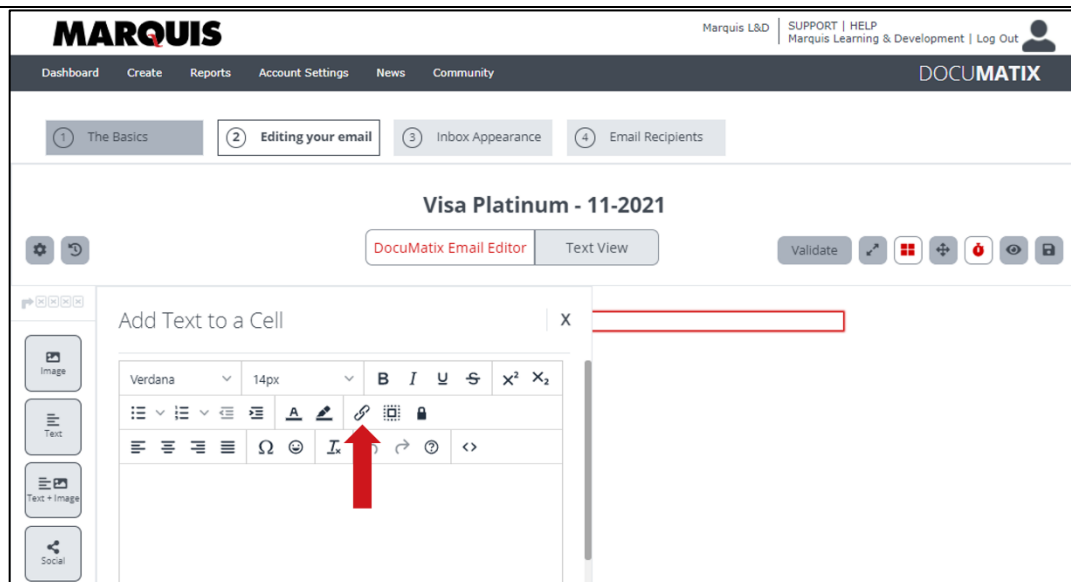| Step 8	Hover over the blank text cell and click the **Edit** icon ✏ to access the editor.
Step 9	Once inside the text cell editor, click the merge field ▫ icon
Step 10	Click the radio button next to the available merge field

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

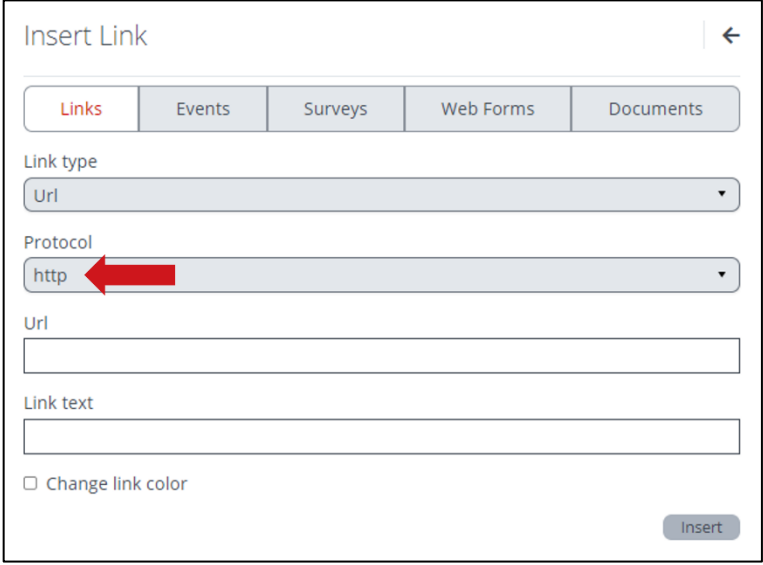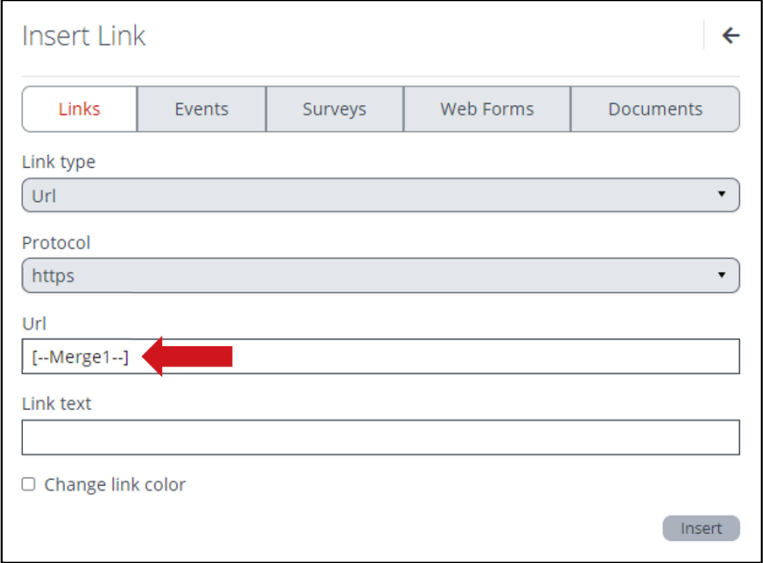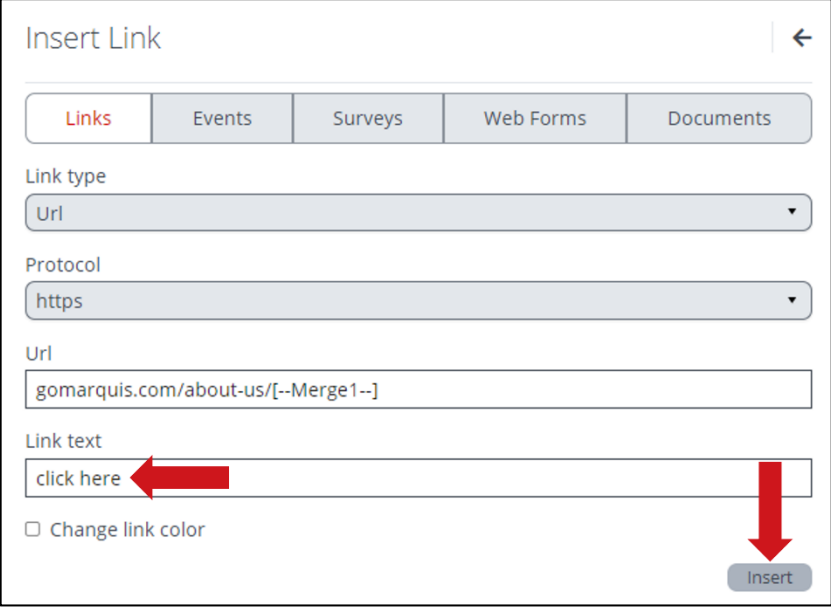| Step 14	Highlight the merge field, right click, and select **Cut**
Step 15	Click the link icon 🔗
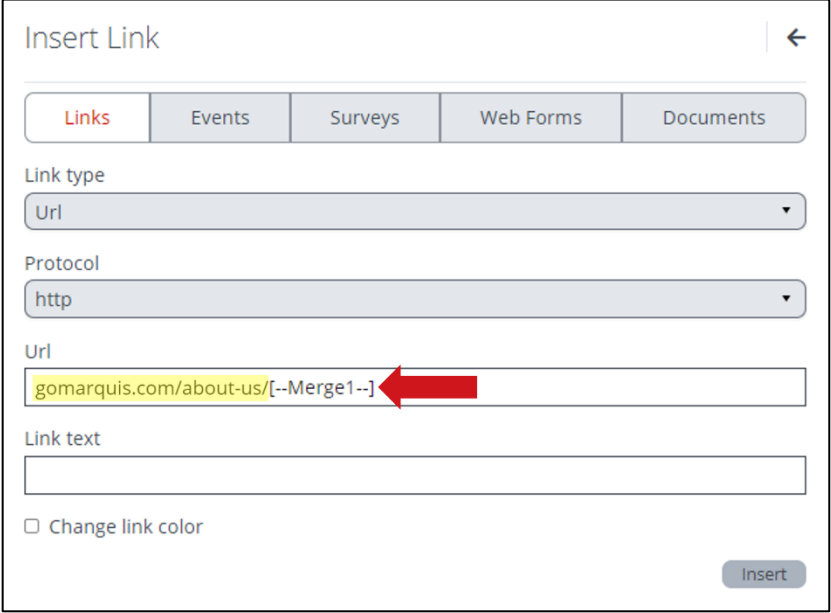
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Step 16	Click the **Protocol** drop-down arrow, and select **http or https**
Step 17	Click into **Url** field, tight click, and select **Paste**
Step 18	Locate and copy the **static** portion of the URL (portion that cannot be modified).

Step 19	Paste the static portion of the URL *before the merge field* 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**

Note: Additional modifications and updates can be made within the email editor if desired.		
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.	
	• Here, **preview with data** by typing placeholder data into the fields below, to display a preview of the email.	

- 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.